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**THE CASE METHOD:
AN ENHANCEMENT TO CURRICULUM IN AVIATION MANAGEMENT COURSEWORK**

D. Scott Worrells

ABSTRACT

This study defines case method from a practical application perspective, in a specific aviation curriculum environment. A detailed discussion of the application of the case method in four courses in the Aviation Management department of the College of Applied Sciences and Arts at Southern Illinois University Carbondale is provided. This discussion describes the evolution of the process first applied in the spring semester of 1996.

A survey of student perceptions of the case method was conducted over a four-year period. The survey instrument, methodology, population, questions, and responses is discussed. Preliminary evaluation of the data indicates that student respondents "agree" far more often than "do not agree" that the case method is an enhancement to their studies in aviation management. An evaluation of these perceptions forms the basis from which recommendations for further research is suggested.

**THE CASE METHOD IN AVIATION
MANAGEMENT COURSEWORK**

At the outset the case method was brought into the classroom to augment a textbook that was more than 10 years old. During the spring semester of 1996 the format was loosely structured and casual. At the conclusion of that semester the impact of the case method on the learning environment was judged by the instructor as mediocre. Although the instructor believed that it was a meaningful process; a structured format for conducting and evaluating it was needed. The effort to discover a better methodology lead to the discovery of numerous articles on the topic. Two of these articles in particular provided a structured format to conduct case analysis.

This paper reports on the application of the case method in aviation coursework and provides the results of a survey on student perceptions of it. At the time of this article the application of case analysis has become a significant component in the curriculum of four courses taught in the Aviation Management (AVM) program at Southern Illinois University Carbondale (SIUC). Student perceptions of the case method were surveyed over a four-year period with 779 surveys distributed and 665 returned providing a response rate of 85.4%.

NATURE OF THE STUDY

The case method was initially incorporated into AVM coursework to stimulate in-class discussion, to augment the subject matter of the textbook, and to provide a connection between the classroom and the real world of the aviation industry.

As the use of the case method evolved it was determined that student perceptions of this process should be gathered and reported on. The present application was derived from previous studies by Lutte (1996) and Lutte & Bowen (1995). Those two studies provided the cornerstone for the application of the case study method discussed herein.

LITERATURE REVIEW

According to Towl (as cited in Lutte & Bowen, 1995) application of the case method can be documented as early as 1915 at Harvard. It has continued to find application in a wide variety of subjects over the years. Definitions are as diverse as is their application. These definitions range from the basic one by Taylor: "a description of an organization or organizational situation" (as cited in Lutte, 1996); to the more complex by Jain, Gooch, & Grantham as an opportunity to generate knowledge (as cited in Lutte, 1996), from Shapiro as a

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metaphor for a selected set of problems and issues (as cited in Richards, Gorman, Scherer, & Landel, 1995), and to the pragmatic by Lutte & Bowen as useful in keeping students attention and applying previously learned skills to real world situations (1995). Bridges, Elliot, McKee & Rice (1997) credit the case method with:

... representing the complexity of the process of change in particular contexts. Case study explores intentions, practice and understandings within a case. This generates information about what is happening and people's understanding of it. It is common for case study to represent different perspectives, different understandings, the unforeseen and unintended. In the inevitable shortfall between intentions to bring about change and the full realisation of those intentions, case study offers the possibility of illuminating the process of change and informing future action.

Getting, and holding on to, a students attention is a difficult task. The classroom environment of today has myriad competitors for a student's attention. The case method has been identified as a school-based teaching/learning strategy that assists students in understanding the relevance of learning. The case method enables the learning environment by providing the link between knowing and doing; thereby capturing and maintaining the attention of the student (Finch, Frantz, Mooney & Aneke, 1997). Case method stimulates active involvement on the part of the student requiring more than simply assimilating information (Richards et al., 1995, p. 375).

The impact case analysis has on communication can not be overlooked. Case studies can help students understand all aspects of communication in the workplace: reading, writing, speaking, and listening. Case studies significantly improve the quality of education, provide a variety of workplace scenarios, and expose students to all facets of workplace communication (Graves, 1999). The degree to which a student masters the skills of communication will directly and proportionately determine their probability of thriving in the real world.

PURPOSE OF THE STUDY

The purpose of this study was to: (1) define case method, (2) discuss the application of the case method to course work in an aviation management environment, (3) provide an evaluation of student perceptions of the case

study process, and (4) make recommendations for further research.

METHODOLOGY

The Case Method Approach

Case analysis, as it was applied in four courses in the AVM program at SIUC, was based upon "How to Use Case Analysis as an Entire Semester Course in Aviation" (Lutte, 1996). The case method in SIUC's AVM curriculum had a dual purpose: to enhance the lecture with case studies and to intensify development of student communication skills. The intent was not to replace lecture based teaching but, rather than that, to augment the lecture with case analysis.

The case method was used to establish the foundation for an interactive learning environment. "A case study is a narrative description of a realistic event that requires a solution to a problem or answers to questions" (Finch et al., 1997). Case analysis of relevant issues, conditions, or situations allowed students to express thoughts, concepts, and beliefs in the safety of the classroom. Subject matter of the case was, to the greatest extent possible, relevant to the curriculum. Case method activities elicited a student capacity to communicate. The instructor, having established an environment for open expression on a topic of common knowledge, enabled students to relate what they understood to others and, simultaneously they received feedback on their interpretations. An opportunity was provided for students to be exposed to different perspectives on a common topic. This process established the foundation for students to refine their communication skills.

These case method activities were not spontaneous and random acts. On the contrary a considerable amount of planning was required for the execution of case method activities to be effective. According to Mostert and Sudzina (as cited in Finch et al., 1997) instructors must:

- Have a thorough understanding of the case study content.
- Select a case study that is relevant to the subjects being studied and that will capitalize on student interests and current knowledge.
- Structure the classroom for multiple small group discussions that provide opportunities for active participation in case discussion.

- Review the questions to be discussed and the decisions or outcomes each group is expected to share with other groups.
- Develop guiding questions to review and summarize the main concepts to be learned as a result of the case study activity.
- Model case discussion and interpersonal communication skills.
- Direct students to respond in their analysis to five areas of inquiry: (1) issues, (2) perspectives, (3) actions, (4) consequences and (5) knowledge needed.
- Assist students in articulating (verbally and in written form) their group and individual responses to the dilemmas posed in the case.
- Relate the outcomes of the case analysis and discussion to the course content.

Case method activities in the SIUC AVM program, that were initiated in one course in the spring semester of 1996, evolved over the study period. This evolution has resulted in a combination of the Mostert and Sudzina model with a modified version of the "Case Analysis Worksheet" and "Guidelines for Writing Case Analysis" (Lutte, 1996). Appendix A illustrates the combination and modifications that were made for conducting a case analysis. The resultant case analysis process was integrated into the curriculum of four AVM courses in the fall semester of 1997. With few and minor adjustments, this process was used throughout the study period.

The Survey Instrument

When the case method process had reached an acceptable level of maturity, spring 1998, it was determined that a study of student perceptions would be useful in determining further application. A survey instrument was developed, submitted to SIUC's Human Subjects Committee for review, and the survey process began in the fall semester of 1998.

The study reported on by Lutte & Bowen (1995) provided the structure for case study analysis as previously discussed. It also provided the framework for the student

survey reported on in this study. The Lutte & Bowen study tabulated data into three frequency categories: Student Evaluation of Teaching, Student Evaluation of Teacher Performance, and Student Preference for Learning Technique. Eighteen of the 24 questions from the Lutte & Bowen study were incorporated into a questionnaire containing 44 questions. This questionnaire was segmented into three categories: the Instructor, the Course, and Case Studies. The questions were formatted in typical Likert scale ranging from: Strongly Agree, Agree, Neutral, Disagree, Strongly Agree. Students/Respondents were provided with an Instruction Sheet (Appendix B), the questionnaire (Appendix C), and a General Purpose NCS Answer Sheet. As indicated on the instruction sheet participation was totally voluntary and there was no intent to identify respondents. Respondents were however, asked to identify the course number, semester, and year in which the questionnaire was administered.

The Human Subjects Committee of SIUC approved the project in March of 1998 (file number 98298) before the questionnaire was first used. The survey was initially administered in the fall semester of 1998. Three extensions were requested and subsequently approved to cover the entire period of the project (1998-2001). The survey was last administered in the spring semester of 2001.

RESULTS OF THE STUDY

Student Perceptions of the Case Study Method

Seven hundred and seventy nine students were surveyed over the survey period. Of these 665 responded to the questionnaire for an overall response rate of 85.4%. Twenty of the answer sheets were determined to be unusable due to multiple answers to one question, unreadable responses, or damaged answer sheets. Due to these anomalies the number of useable responses were 645 with an adjusted response rate of 82.8%.

In 1998, fall semester only, the response rate was 83.8%, in 1999 the response rate was 90.4%, in 2000 the response rate was 84.7%, and in the spring semester of 2001 the response rate was 78.0%. The mean response rate for the survey period is 84.2%. Table 1 provides aggregate respondent data gathered as well as the response rates (not adjusted) across the survey period for each of the four courses in which the case method was used.

A representative cross-section of survey questions and responses (5 questions per category) are illustrated in Table 2.

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The instructor.

Overall student perceptions of the instructor's application of the case method was favorable. Thirteen questions were asked in this category. These questions were designed to determine student perceptions of the instructor's effectiveness with the case method. Students/Respondents were asked about the instructor's effectiveness, responsiveness, enthusiasm, and preparation in the application of the case method. The data indicated: (a) 37.3% of those responding to the survey "Strongly Agreed", (b) 44.2% "Agreed", (c) 12.2% were "Neutral", (d) 5.1% "Disagreed", and (e) 1.1% "Strongly Disagreed" that the instructor made an overall positive impact on students with the application of the case method.

The course.

The data gathered in regard to student perceptions of how well the case method contributed to the course were, in general, less favorable than the responses regarding the instructor. In relation to the course, and case method impact thereto, there were 10 questions which covered such areas as to what degree did the case method enhanced the course, whether or not it should be used at all, and did it keep the course interesting and current. The data in this category indicated: (a) 17.9% of those responding to the survey "Strongly Agreed", (b) 41.3% "Agreed", (c) 22.5% were "Neutral", (d) 14.3% "Disagreed", and (e) 3.6% "Strongly Disagreed" that the case method made an overall positive impact on the course.

Case study method.

The last category of questions asked for student/respondent perceptions of the case study method. Here responses were also less favorable than those for the instructor and, although similar to those responses towards the course, the trend toward a less favorable overall perception continued. In this category there were 21 questions that were intended to determine whether or not respondents would recommend the case method, found it challenging, thought that it should only be used in upper-level courses, and/or believed it enhanced communication skills.

The data in this category indicated: (a) 17.1% of the respondents "Strongly Agreed" with the use of the case method, (b) 34.3% "Agreed", (c) 26.1% were "Neutral", (d) 16.7% "Disagreed", and (e) 4.8% "Strongly Disagreed"

with this approach.

CONCLUSIONS

There are as many definitions for the case method as there are applications. In aviation coursework the case method was defined as a written description of events and circumstances that affect the aviation industry, an aviation organization, or a basic unit of the aviation industry. The full effect of the case method is realized when all aspects of communication are applied: reading, writing, speaking, and listening. The goal of the case method in aviation coursework is student/teacher interaction through guided exploration and discovery. Proper planning on the part of the instructor will ensure that the students make the connection from what they are studying in the classroom and what is going on in the real-world workplace of the aviation industry. The case method allows the student to become a decision-maker and practice being a manager. Critical thinking may also be exercised through the case method. The proper selection of cases will challenge students to make decisions when all the information is not available or when there is no specific correct answer. This aspect of the case method allows students to apply the concepts of maximizing, satisficing, and optimizing. Through practice students learn to assess risks and balance them against the potential consequences of their decisions.

Presentations on case studies further develops a students ability to integrate, organize, and succinctly convey the results of their analysis to others in a way that contributes to the discovery process. Discussion provides an opportunity to strengthen skills in orderly discourse, agenda setting, organizing and orchestrating argument and debate that has an impact on listeners.

As the results of the survey data indicate the majority of students approve of the case method in aviation coursework. The data indicates that instructor effectiveness and course value is enhanced by the use of the case method.

Further research in this area should be directed at evaluating the impact of the case method on grade point average and comparisons between traditional students and non-traditional students in adapting to the case method. A follow up study to determine what impact the case method has had on employability and application to the working environment of those participating in the four year survey period would be of interest to case study practitioners. □

D. Scott Worrells earned a Master of Science in Aviation Management, a Bachelor of Science in Aviation Technology-Avionics, and an Associate of Science in Aviation Maintenance Management from Embry-Riddle Aeronautical University. He is an associate professor in the Department of Aviation Management and Flight at Southern Illinois University Carbondale.

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APPENDIX A

Instructions for Writing a Case Study

Case Study

Case studies are an excellent means to bring current, real time occurrences and issues into the classroom for detailed analysis. You are not bound by any rules in conducting your analysis. What you have here are guidelines to conduct a case study. You should consider them base line requirements; you may elaborate to any extent you wish. However, part of the exercise is to help you express yourself efficiently and effectively. Each case study should be no less than one page and no more than two pages. You do not need to be verbose. State the facts, as you see them, as clearly and concisely as you can.

In number 3. Do you agree with the article? Why? simply indicate whether or not you agree or disagree and justify your stand. In number IV. Alternative Actions you must provide at least two alternatives that are derived from the article, each must have justification, and each alternative must have two advantages and two disadvantages. In number V. Recommendation provide your suggestion for resolving the problem. Your recommendation must be justified and have at least one advantage and one disadvantage. Using an alternative from number IV. Alternative Actions is **not** acceptable.

You must cite the article in text, by either quote or by paraphrase. At the end of your analysis you must provide a reference to the article according to the Publication Manual of the American Psychology Association, Fourth Edition.

Case Analysis Worksheet.

After reading the entire case, answer the following questions:

1. What is the single, main strategic issue or problem? Be specific. (.5 points).
2. What are the critical factors (the most important facts) of the case? (.5 points).
3. Do you agree with the article? Why? (1 point).

Was the article's/author's objectives fulfilled? Yes/No. (1 point).

Guidelines for Writing Case Analysis.

I. Summary (1 point).

The summary should be concise and briefly recap the case. The primary purpose of the summary is to refresh the reader's memory of the case. Keep this section to no more than one paragraph in length (three to five sentences).

II. Problem (1 point).

Begin this section with a clear statement of the problem. Elaborate on what caused the problem if need be. The problem should be specific and action oriented. The problem or issue statement reflects a situation that must be addressed. However, do not confuse SYMPTOMS of the problem with the problem itself. This entire section should be no longer than one paragraph (three to five sentences).

III. Critical Factor (1 point).

Identify the most relevant FACTS you considered when thinking through the problem, possible alternatives, and outcomes. Critical factors are such things as industry decline, weak financial position, etc. Briefly state critical factors pertaining to your case and tell why you believe these to be critical. This section should be no more than one paragraph in length (three to five sentences).

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IV. Development of Alternative Actions, two each, (2 points).

Each alternative should provide a feasible, realistic way to solve the problem. Describe each alternative in two or three sentences. Then briefly list the primary advantages and disadvantages for each alternative (2ea). Be consistent with critical factors. Some cases may have only two or three alternatives while others may have several. These alternatives should be derived directly from the case study. This section should be no more than two paragraphs in length. A matrix format, explained by the instructor is encouraged.

V. Recommendation (2 points).

Now, based upon what you have read in the textbook, listened to in class, and experienced in your aviation career, provide a recommendation, just one, completely outside of what is identified in the case study and elaborate on it. Explain why your recommendation is superior and why it's advantages outweigh it's disadvantages. How might disadvantages be overcome or minimized? What is involved in implementing this recommendation? How long will it take? How much will it cost? What results do you anticipate? BE CREATIVE! You may have to make assumptions in formulating your recommendation. Assumptions are acceptable to the extent that they are clearly articulated. Use the information you have and work with it. Rarely do decision makers have all the information they would like to have. This section should be no more than two paragraphs. Do not hesitate to go out on a limb. Innovation is highly desirable. A matrix format, as discussed for number IV. Alternative Actions above, is acceptable.

APPENDIX B

Student/Respondent Instruction Sheet

Student/Respondent:

The attached questionnaire is submitted to you from David S. Worrells, an Assistant Professor in the Aviation Management and Flight Department in the College of Applied Sciences and Arts at Southern Illinois University at Carbondale.

This questionnaire is intended to gather information on student opinions related to the use of case studies in aviation related classes. The information will be used to support research in the area of case studies utilized as instructional aides to classroom lecture.

To complete the questionnaire you should follow the instructions on the answer sheet provided. Select the response that best describes your feelings. The responses range from A. Strongly Agree; B. Agree; C. Neutral; D. Disagree, and E. Strongly Disagree. The questionnaire should take no longer than 15 minutes to complete.

The questionnaire is being submitted to students taking aviation related courses in which case studies have been used to augment instructor lecture. Those responding to the survey should have taken at least one of the following courses: AVM 371 Aviation Industry Regulations, AVM 374 General Aviation Operations, AVM 376 Aviation Maintenance Management, or AVM 461 Aviation Product Support. If you are not an aviation student and you have not taken at least one of these courses you should not respond to the questionnaire.

Completion and return of this questionnaire indicates voluntary consent to participate in this study.

There is no need for you to put your name on, or in any other way identify, your questionnaire. The intent of this research is to gather information about your opinion of case studies. There will be no numbers, coding, or any other attempt made to identify questionnaire respondents.

Should you wish to have access to the data gathered by this questionnaire you should contact David S. Worrells at 618-453-8898, AVM/AF, Mail Code 6623, CASA, Southern Illinois University at Carbondale, Carbondale, IL 62901-6623. Any and all information requested shall be provided upon request.

This project has been reviewed and approved by the SIUC Human Subjects Committee. Questions concerning your rights as a participant in this research may be addressed to the Committee Chairperson, Office of Research Development and Administration, Southern Illinois University, Carbondale, IL 62901-4709. Phone: (618) 453-4533.

Thank you for your cooperation,

David S. Worrells

APPENDIX C

Questionnaire

Note: A Likert scale was used:

A. Strongly Agree B. Agree C. Neutral D. Disagree E. Strongly Disagree

The Instructor

1. Provided clear and understandable instruction for completing case studies.
2. Was enthusiastic about case study analysis.
3. Was responsive to student questions about case studies.
4. Assigned case studies that have been effective aids to learning
5. Explained and clarified case study subject matter.
6. Graded case studies fairly.
7. Was helpful in understanding how to conduct a case study.
8. Specified objectives for conducting case studies.
9. Clearly identified case study expectations.
10. Evaluated and returned case studies in a timely fashion.
11. Stimulated thinking through case study analysis.
12. Was well prepared.
13. Overall, effectively used case studies in teaching this course.

The Course

14. Was significantly enhanced through case studies.
15. Should be taught without employing case studies.
16. Was kept current utilizing case studies.
17. Was made interesting with the use of case studies.
18. Was meaningful to me with the application of case studies.
19. Was brought to life through case study exercises.
20. Helped me grasp complex issues by conducting case studies.
21. Facilitated my ability to methodically analyze issues with the case study approach.
22. Through the application of case studies provided real time examples of the working environment.
23. Through the application of case studies, established an environment for the meaningful exchange of thoughts and ideas related to subject matter of the course.

24. Are a recommended means for students who want to understand a subject.
25. Challenged my ability to get information.
26. Increase professor/student in class interaction.
27. Are best used in upper division courses.
28. Dealt with current issues.
29. Gave me a broader perspective of the aviation industry.
30. I don't like them.
31. Enabled me to learn more than in classes which utilize simulations of lecture only.

Case Studies

32. Encouraged me to write better.
33. Were graded fairly.
34. Improved my willingness to speak in class.
35. Are my favorite technique.
36. Should be assigned as homework only.
37. Helps me understand complicated subjects.
38. Should count toward a greater part of the class grade.
39. Enabled me to learn more than reading and outlining a chapter.
40. Should be based upon articles that students provide.
41. Help me remember concepts.
42. Enabled me to learn more than through term projects or term papers.
43. Should be conducted in class, as group projects.
44. There should be fewer case studies required.

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Table 1

Response Rates: Overall and Specific AVM Courses

Year	Surveys	Respondents	Response Rate (%)
Overall			
1998	191	160	83.8
1999	228	206	90.4
2000	269	228	84.7
<u>2001</u>	<u>91</u>	<u>71</u>	<u>78.0</u>
Totals	779	665	85.4
Aviation Industry Regulation AVM 371			
1998	65	45	69.2
1999	61	56	91.8
2000	53	49	92.5
<u>2001</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>
Totals	179	150	83.8

(table continues)

Table 1 (continued)

Response Rates: Overall and Specific AVM Courses

Year	Surveys	Respondents	Response Rate (%)
General Aviation Operations AVM 374			
1998	29	27	93.1
1999	54	49	90.7
2000	53	43	81.1
<u>2001</u>	<u>46</u>	<u>35</u>	<u>76.1</u>
Totals	182	154	84.6
Aviation Maintenance Management AVM 376			
1998	69	63	91.3
1999	95	84	88.4
2000	152	127	83.5
<u>2001</u>	<u>31</u>	<u>27</u>	<u>87.1</u>
Totals	347	301	86.7

(table continues)

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Table 1 (continued)

Response Rates: Overall and Specific AVM Courses

Year	Surveys	Respondents	Response Rate (%)
Aviation Product Support Management AVM 461			
1998	28	25	89.3
1999	18	17	94.4
2000	11	9	81.8
<u>2001</u>	<u>14</u>	<u>9</u>	<u>64.3</u>
Totals	71	60	84.5

Note. In 1998 and in 2001 only the fall and spring semesters, respectively, were surveyed. For the purposes of this chart the response rates are not adjusted based upon $n = 665$.

Table 2

Results: the Instructor, the Course, Case Study (n = 645)

Question	SA	A	N	D	SD
The Instructor					(%)
Provided clear and understandable instruction for completing case studies.	40.9	44.3	8.2	5.9	0.6
Specified objectives ... case studies.	34.9	46.2	11.3	7.0	0.6
Clearly identified case study expectations.	35.3	49.9	9.1	0.1	0.5
Evaluated ... in a timely fashion.	60.0	33.6	3.6	2.2	0.6
The Course					
Was significantly enhanced	16.3	38.6	25.4	14.7	4.5
Was kept current utilizing case studies.	28.1	49.0	15.0	6.0	1.6
Was meaningful with ... case studies.	14.0	38.8	29.1	14.6	3.1
Provided realistic examples	26.4	52.4	14.6	4.7	1.7
Case Study					
Dealt with current issues.	37.5	51.3	7.9	2.5	0.5
Should be assigned as homework only.	9.6	25.4	36.1	22.6	5.4
Challenged my ability to get information.	19.1	40.3	24.3	13.3	2.6
<u>Were graded fairly.</u>	<u>35.0</u>	<u>45.0</u>	<u>11.9</u>	<u>6.0</u>	<u>1.2</u>

Note. Text of some questions was altered to fit the table.

