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THE CASE STUDY DISCUSSION METHOD AS USED BY OUTWARD BOUND FOR INSTRUCTOR JUDGMENT TRAINING

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I. Introduction: "When Judgment Is Crucial"

Risk is at the very center of the Outward Bound experience. We lead our students through natural and social environments in which we encounter inherently risky situations. There are the risks that derive from rocky terrain and inclement weather, the risks stemming from the kinds of activities and testing situations we devise to stretch our students physically and mentally, and those that come from the interpersonal dynamic of placing a small and diverse group together in stressful circumstances.

*"What is the meaning of RISK, this well worn and often abused term? Here is the simple definition: **Risk is the potential to lose something of value to us.** What we need to remember is that our **motivation for risk** is to **gain** something of value—good health, self-confidence, recognition, spiritual growth, money, friends, relationships, career move, whatever it might be. But in short, it comes out to a life worth living."*

—Jed Williamson (1997): "Understanding the Meaning of Risk"

"Only those who risk going too far can possibly find out how far they can go."

—T. S. Eliot

Without risk, the Outward Bound growth and learning process could not happen. Insuring that the risky experiences into which we impel our students are both meaningful and manageable, however, requires that our schools and our staffs understand and faithfully practice the effective management of risk.

Once out in the field on a course, a team of instructors must make frequent decisions as they encounter the myriad risks their course provides, and all without benefit of the resources—the help—of the personnel back at the base; they are quite literally on their own; they are the on-the-scene risk managers. Will they know what to do? Will they have the knowledge, the skills, and the judgment to make good decisions when faced with the challenge of choosing the best course of action in the face of a potentially dangerous situation?

To accelerate the process through which our instructors gain in the wisdom needed to make prompt and constructive decisions, Outward Bound USA has created the Instructor Judgment Training (IJT) curriculum, which utilizes the Case Study Discussion Method, as developed at the Harvard Business School. Sound judgment is developed through experience, most certainly, but it also may be fostered through an intentional series of training activities that will advance the process through which an individual acquires the wisdom to make rapid and beneficial decisions when faced with critical situations. The IJT curriculum provides a carefully planned and structured method for engaging all instructors in an active process of analyzing and learning from the experiences of their own colleagues and of other wilderness educators.

Gathered together with peers and senior staff members in a discussion-based workshop format, participants are encouraged to investigate and to debate the significant details of actual incidents and accidents, then draw conclusions about the lessons to be learned from each case. Field staff are thereby provided with a structured opportunity through which to relate their own experiences, perspectives, and understandings, plus those of their colleagues, to the events described in the case studies. Further, a protocol for accident analysis, a model of the decision-making process, and several keys for understanding relevant aspects of human motivation are presented and discussed.

The IJT curriculum thus provides an opportunity for staff members to make significant gains in their personal understanding of the many factors that must be considered when making critically-important decisions, as well as of the process for choosing a course of action which will yield the most favorable consequences, both short-term and long-term, for all stakeholders.

The Harvard Discussion Leadership teaching technique employed by the IJT workshop facilitators also demonstrates for field instructors a pedagogical model that they can use during their own courses for fine tuning, building on, and extending the routine debriefing process used with their students. By adopting the questioning and discussion management strategies of the discussion leadership

method, instructors will find that their debriefing sessions are more interesting, more productive, and, likely, more enjoyable.

“Learn from the mistakes of others; there isn’t enough time to make them all yourself.”

—Eleanor Roosevelt

“The lessons learned from the study of accidents, while not a substitute for actual experience, can be very useful for outdoor leaders when they are faced with similar situations. The discussion, analysis, and evaluation of accidents are important and necessary tools for outdoor leaders to use if they are to learn how to reduce accidents.”

—Drew Leeman and Scott Erickson, in *Lessons Learned* (2000), D. Ajango, ed.

“Those who cannot remember the past are condemned to repeat it.”

—George Santayana

II. The Case Study Discussion Method

We have found that the Case Study Discussion Method is well-suited to providing our instructors with the opportunity to hone their decision-making and judgment skills. In a workshop setting, led by a trained facilitator, participants are presented with a series of case studies drawn from Outward Bound’s four decades of operation in the USA, and from the experience of similar organizations.

The process of reflection, discussion, and analysis of the specific incidents takes place in solo, duo, small group, and whole group configurations, guided by probing questions and clarifying comments from the facilitator. By deliberating about the specifics of each case with colleagues who have both greater and lesser levels of experience, instructors deepen their understanding of the variety of contributing factors, and the dynamics involved, in each critical situation. Role-playing, musical selections, visual aids, journaling, and participant-led case discussions are other teaching strategies used both to add variety and to enhance the learning experience.

Finally, based on their discussions about the cases, and gathered in a whole-group forum, IJT workshop participants derive together a body of learnings that they will be able to apply, should they ever have to deal with a crisis situation of their own.

An endorsement for the use of the Case Discussion approach

In their book about the Harvard Business School’s approach, entitled *Teaching and the Case Method* (Third Edition, 1994), Barnes, Christensen, and Hansen write:

“... we believe that when educational objectives focus on qualities of mind (curiosity, judgment, wisdom), qualities of person (character, sensitivity, integrity, responsibility), and the ability to apply general concepts and knowledge to specific situations, discussion pedagogy may well be very effective.

“Lectures about judgment typically have limited impact. Reading about problems or memorizing principles does little to prepare the practitioner...to apply concepts and knowledge to the complexity of real-life problems.

“Discussion teaching [however]...puts the students in an active learning mode, challenges them to accept substantial responsibility for their own education, and gives them firsthand appreciation of, and experience with, the application of knowledge to practice.”

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III. How to Write a Case Study

1. Always be on the lookout for reports of significant incidents and accidents that might make effective case studies for use in your staff trainings.

2. Sources in addition to your own program’s operations include: stories related by colleagues and published accounts (e.g., media reports; OutdoorEd.com; *Accidents in North American Mountaineering*; *Sea Kayaker* magazine; *Outside* magazine, etc.).

3. Once you have determined that a particular occurrence has good potential, you will need to find out all you can about the facts of the case.

4. Request from the organization on whose course the accident/incident occurred all of the documents related to the particular event, including the internal and/or external review report(s), and the organization’s response to the reports. Gather anything else that you can find about the situation (for example: trip leader’s narrative, students’ narratives, timeline, media reports).

5. Carefully study the snowdrift of printed source materials that you have accumulated.

6. Talk to anyone you know who knows anything about the incident and/or the geographical area where it occurred. Obtain maps, pictures, etc., if possible. GoogleMaps may be useful.

7. Write out a draft narrative of the events as they occurred.

- Note that this may be a straight adaptation of the timeline, or it may be more of a dramatization, or somewhere in between.
- Be very sure to significantly change all names of persons and locations, to disguise the actual incident and its participants.
- To increase the value of the case study for discussion and teaching purposes, you may want to choose to alter some information from an original incident.

Further, some details for a case study report may be either supposed re-creations of the original, or wholly fictional. Be sure that, if you choose the route of mild fictionalization, you keep to the essence and spirit of the original. Also, you should indicate to workshop participants during the final whole-group discussion any parts of the narrative where you have been “creative,” and why you have chosen to do so.

8. Divide the narrative into two distinctive parts (or, possibly three, for a very long narrative) at a logical point during the story. This is necessary to provide a break for the first of the case discussion periods, which comes after the first (or first series of) major decision point(s) in the narrative.
9. Develop a “dramatis personae” page, with a listing of the characters, a description of the setting, and a group of starting questions, to serve as an introduction to and resource for the discussion. Also develop a series of discussion questions for Part B (and C).
10. Share these drafts with others on your staff training team.
11. Revise.
12. Send the revised version to the safety director (and possibly others) at the organization where the incident occurred and ask for his/her feedback, suggestions, corrections, additions, etc.
13. Revise again, and re-submit to the organization, and to your staff training team.
14. Ensure that the Organization is OK with the use of the case study for your workshops.
15. Try the new case study out at your next workshop and make any further revisions on the basis of the trial run.
16. Be sure to re-submit the revised version to the organization if the latest revisions are at all substantive. In any event, an appropriate courtesy will be to send the latest version to the organization where the incident occurred for their files.
17. You may wish to guarantee your “intellectual property rights.” See the Library of Congress’s website, www.loc.gov/copyright. The website’s FAQ section has a good summary of copyright law and how to register your work officially with the government.

If you are interested in contributing your new case study to future editions of *The Outward Bound® USA Instructor Judgment Training Guidebook*, contact the author of this article.

IV. Some Teaching Strategies

Plan out, ahead of time, a series of discussion-provoking questions which you will use to keep things moving, both forward and into greater depth. Try to figure out questions that will really carry things forward. The secret of the discussion method is in the questioning process, not the answering process.

During the discussions, try very hard to hang on to what people say/have said, and who said what. Then, as the discussion proceeds, refer to points made previously when relevant, and mention the names of the participants who made those points.

If there are specific finite details that you as the facilitator want to bring out, get to them first (e.g., to establish the facts of the case, etc.). Then move on to “the questions beyond the answers.”

The discussion leader should be transparent to the discussion; participants should not be able to tell what the leader’s opinions about the cases are.

Facilitators should never give “the” answer, especially since there usually isn’t one “right answer.” But, facilitators may want to give their opinions at the end of the discussion.

Cases are best when there’s some ambiguity in the situation. The questions become interesting when there are legitimate differences of opinion about the situation.

“The goal of the discussion isn’t so important as the direction it’s going in.”

—Professor Lewis B. Barnes, Harvard Business School

Select one participant, either before the discussion of a case begins, or with a “warm call”—a request that he or she be prepared to take over the role after five more minutes—to be the lead instructor/trip leader in the incident being discussed. He or she can then appoint his or her assistant. The group discussion is then directed and run by those two participants, with minimal moderation by the facilitator. Obviously this would only be done after the group has a fair amount of experience with the case discussion method.

Divide the class in half and have each side play the role of one of the contending sides in the situation.

Use visuals: newsprint and markers; blackboard; PowerPoint; overhead projector; maps, etc.

Work with the participants to create flow diagrams or “maps” with decision points and possible alternative courses of action, with the likely consequences (costs/benefits) of each alternative. Small groups could create their own diagrams; then compare with other groups’ versions.

Costs: what if we were focusing on costs, the way a business school case study might? Consider, for example, costs such as financial, emotional, time, public relations, career impact, enrollment figures, course quality, quality of the experience for the individual “customer,” etc.

Brainstorm and identify all of the “stakeholders” in a

case of this kind. What are the impacts—for each of the stakeholders—of the events of this case?

V. Finally, Leading The Workshop: Points Picked Up

A big question to ask with reference to any accident or incident situation: WHY are they making that decision? What led them to decide that way? Always trouble-shoot in your head—it's like “war-gaming”—the worst-case scenarios. Run the “what if” scenarios through your mind, and in your discussions with colleagues.

Since the best discussions of cases stem from a willingness on the part of the participants to place themselves into the scene, to put themselves “in the shoes” of the decision-makers in the scenario, encouraging participants to do this “what if” thinking helps implant that process in their minds, with the greater likelihood that they will use the process when they are out on expedition in the future.

Remember Murphy's Law: “If anything can go wrong, it will.” It's true in the field, but also true in the context of an judgment training workshop!

Do your homework! What do you—the workshop facilitator—see in this case study? What are the issues and themes it raises for you? Why, in your view, should this case be included in the curriculum in the first place?

Professor Barnes of Harvard Business School spends at least one hour of preparation for each hour that he actually spends in class, even when he has taught the particular case study many times before. He's been following that practice for decades.

Be ready to expect unexpected insights from participants, and to include them as points to make in your future workshops.

Be sure to congratulate the insightful participant on his or her perceptiveness.

Keep track of these insights (on newsprint, for example) and record them in a notebook, etc., for future reference.

Reflections from an Outward Bound Trustee

When introducing the discussion of a case study, invite the participants to step back and look at the situation as an outsider would do. Then, try to get into the other person's head (the mind of the person faced with the critical decisions that must be made).

- What does he/she need?
- What does he/she need—or want—to get out of the situation (to derive from the situation)?
- Instructors need to resist pressures from students.
- The instructors are smart enough to deal with difficult situations; they just need to stand back (and think through the consequences of the choices/decisions).
- Remember to highlight the fact that decisions made during stressed situations must usually be made very quickly; so, formulas, protocols, decision models, etc., are often of little use. Instead, it is the combination

of instinct (“gut feelings”), pattern recognition, and the lessons of one's own past experiences and those of others that must serve as the guide to the risk manager in the field.

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