

# HOW TO WRITE A CASE

A Guide for Case Writers and Advisors

With tips on case writing from Teachers Network Leadership Institute MetLife Fellows —*In their own words*



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Funded by a grant from **MetLife Foundation**

## INTRODUCTION

This monograph is intended to be a guide for case writers – MetLife Fellows in the Teachers Network Leadership Institute. It will provide an understanding of what cases are and are not. In addition, this monograph will address the purpose of cases and how they are used. Finally, it will outline the form, structure, and key components of a case. For both those advising and those overseeing case writers, and for the case writers themselves, this should serve as a thorough introduction.

## CASE BACKGROUND

Before undertaking the writing of a case, it is important to understand fully what a case is and how it is used. It is also important to know how they are related to action research

### What is a Case?

Cases, written by teachers, are dramatizations of real life scenarios about the lives of students, teachers, families, and administrators. Most often, the scenarios revolve around how policies made elsewhere play out in schools. The topics for cases can be any policies that teacher-writers find relevant to their work.

Cases and the case method of instruction have a long history in professional education and preparation. They are usually intended to provide educators – from teachers to superintendents – a test opportunity to view the results of applying policy into their practice. TNLI uses them with policy-makers and educators to help them see how policies play out when implemented in local contexts.

### What is the Purpose of a Case?

Well-developed cases encourage discussion and debate. They engage readers in powerful and sometimes emotional exchanges because they evoke personal beliefs and values. Often, amongst stakeholders, these values and beliefs may be in conflict.

The theory of action behind case use is that by having open and honest exchanges, in which multiple perspectives are aired, we can promote critical analysis and more extensive understanding of the issues. While

the case may lead participants to clarify their own thinking around the issues, the intention is not to develop one ‘right answer’ or a particular viewpoint. Instead, its role is to stimulate thoughtful dialogue, careful listening, and collaborative problem solving.

The goal is to help policymakers understand how policy plays out in real classrooms and in real schools, and to experience, through the case, the consequences (intended or unintended) that result from national, state, and local education policies.

### How are cases related to action research?

Since the mid 90s, TNLI Fellows have been developing a rich library of action research studies, demonstrating the consequences of policy in actual schools and classrooms. Action research is used to inspire the context or the issues for a case. Action research is also used to support different characters’ points of view in a case. In turn, cases may inspire further action research. The goal of these

If you want to add **research** to your case, one additional source of research for your case may be the action research’s bibliography to further research.— Connie Parsons; MetLife Fellow; Sacramento, CA; [\*One Student at a Time: The Fight Against Alliteracy in High School\*](#)

fictional-  
i z e d  
cases is  
to better  
engage  
policy  
c a s e  
makers and allow  
writers the opportunity to use the action research in order to bring in competing interests.

### What Cases Are Not

**Cases are not “case studies.”** The case is fictionalized, while a case study is a retelling of an actual event. In addition, case writers do not provide analysis or reflection on the depiction as a does the writer of a case study.

**Cases, though inspired by action research, are not research studies.** Research studies present and analyze data on an actual event. Cases present dramatized scenarios based on this research.

**Cases do not lead the reader to one “correct” prescribed course of action.** Instead, cases present multiple points of view among which reasonable and well-intentioned people can disagree.

**Cases are not finished stories.** At their end, cases lead the protagonist to a decision point.

# HOW TO WRITE A CASE

Cases are a form of narrative writing. They are written as a piece of realistic fiction, with believable context and characters. They are descriptive. For example, you are not simply naming a certain policy; you are showing how the policy plays out.

A *vignette*, even if not used in the final version of the case, can be very useful in getting you started.—Audra Vanderland; MetLife Fellow; New York City, NY; [In Who's Best Interest?](#)

A well-written case requires five components: Issues, Characters, Context, Action-Forcing Moment, and Discussion Questions.

Know why you are writing the case. You may want to illuminate an issue that is playing out in your school or school system. Build your case around a central dilemma and consistently return to the dilemma to explore it from different perspectives through the differing stances of your characters.

## Components of a Case

Though presented as discrete, for clarity sake, when writing a case, you will find that these five components are overlapping and interactive. Your issue will help determine your characters. Your characters' points of view will shape your central dilemma.

### 1. The Issue

Find an issue that you're interested in that also has relevance in the education field. Reading action research can help identify an issue. You need to be able to present multiple perspectives around your issue, so that it allows for people to draw different conclusions after reading it. Once you've identified an issue, now is the time to think about your central

Be aware that while you may be writing with one overall *issue* in mind, other factors will also arise within the case. Different readers of the case will have different "take-aways" from reading the case. — L. Kelly Escueta Ayers; MetLife Fellow; Fairfax County, VA; [The Case of Alicia and Kids Like Her](#)

dilemma. A dilemma is a situation in which reasonable people can disagree – a situation requiring a choice between reasonable alternatives. A dilemma is different from a problem in that a problem can be solved, while a dilemma may have multiple solutions. For an example of

a clear central dilemma, see *Mastery or Progress?: The Standardized Testing Debate Comes to The Classroom*, by Barbara Condliffe and *What Diploma Are You Worth?*, by Terna Tilley-Gyado.

When choosing a *title* for your case, consider one that does not literally name your issue or state one position. Remember that cases do not promote one side or perspective only.—Cara Shuckett; MetLife Fellow; New York City, NY; [All Students-One School](#)

In order to get to your central dilemma, ask yourself:

- What situation in my school or school district do I want to illuminate?
- What do I know about this issue? What experiences have I had with this issue? What stories can I tell about this issue?
- What constituents does the issue impact?
- What points of view about the issue do I want to express?
- What are the competing arguments in support of these points of views?
- What research is relevant to this topic?
- What issues do I hope to will be discussed and debated by readers of this case?
- What will my action-forcing moment be?
- What are the potential solutions to the dilemma?

Creating a list of *characters* with their backgrounds and personal contexts will help you to flesh out your characters and make them more realistic—people's "itches and ouches."—Jason Wagner; MetLife Fellow; New York City, NY; [The Third Way: A Concept of Mentorship](#)

### 2. The Characters

Cases are character-driven; therefore, your characters need to be well developed – it's important to make your characters come alive. Describe your characters – how they look, what they sound like, their personality. We need to know what motivates their actions; their actions must make sense. Listing the characters can help you to consider multiple perspectives through the players. It helps to think about the points of view you want to present and them match those points of view to believable characters (*see graphic organizer*). Realistic dialogue – writing how people talk – also helps develop believable characters. Jason Wagner's *The Third Way: A Concept of Mentorship* offers an exceptional example of excellent character development.

In order to develop believable characters, ask yourself:

- What points of view am I presenting?
- Who are the best characters to present these points of view?
- How are my characters impacted by this issue?
- Who will be the best protagonist (main character) for this issue?

The protagonist is the character who has the action-forcing moment and is challenged by other points of view.

- What important details about these characters will enhance the case?
- What skills / knowledge / experience (s) do these characters possess that will be important to the telling of the story?
- What underlying beliefs and values do the characters bring to the issue?
- Have I included perspectives from the most relevant stakeholders?

### 3. Situational Context

Think about the context within which your case takes place. What factors about this context are important for the reader to know about the issue?

- What policies impact this issue? How do these policies play out?
- What pressures from outside the classroom or school impact the issue or constrain the characters' actions?
- What problems, opportunities, and risks do the characters face in terms of their actions regarding the issue?
- What kind of supports do the characters in the case have? Who and what can the characters count on and who and what should the characters view as obstacles with respect to the issue?

The case, *A Year and a Day*, by Reema Marji, does a good job describing how the situational context of the school neighborhood affects the policy in question.

Use subheadings within your case to facilitate readability.—Elizabeth Gil; MetLife Fellow; New York City, NY; [A Matter of Reflection or Evaluation?](#)

During the process of writing your case, it will be helpful to have others read it in its various stages and offer **feedback**. Readers ask clarifying questions and bring up points that will enrich your case and help you to more fully develop the context and the players involved in the issue(s) presented.—Anokhi Saraiya; MetLife Fellow; New York City, NY; [The Balancing Act: Effectively Meeting the Needs of ALL Students and Teachers](#)

### 4. The Decision/Action-forcing Moment

The story should not have a conclusion; rather, it should bring the protagonist to a point in time when she has to make a decision about the dilemma that will affect the other characters and herself. Starting with a strong central dilemma helps bring your decision/action-forcing moment

into focus. In *Mastery or Progress? The Standardize Testing Debate Comes to the Classroom*, Barbara Condliffe presents the reader with a clearly articulated central dilemma.

- What compels a decision in the case?
- What are the alternative courses of action?
- What are the potential consequences of different decisions for the characters and the situation?
- What forces the protagonist to take a position?

### 5. Discussion Questions

Your discussion questions should take the particulars of your case and generalize them to the larger issues addressed.

- Do your questions encourage the discussants to take a position?
- Do your questions ask the discussants to question assumptions?
- Are your questions open-ended?
- Do your questions enable discussants to consider multiple points of view?

Think about your **discussion questions** as you write.—Mary Post; MetLife Fellow; Santa Barbara, CA; [In the Wake of "No Child Left Behind"](#)

In *All Students-One School*, Cara Shuckett offers discussion questions that are open-ended – encouraging the reader to consider multiple perspectives.

## CONSIDERATIONS

### **Audience(s)**

While policy seeks to enable more effective education to occur, some policies may be established with little input from the field. The professional judgments and decisions of practitioners are important in deter-

mining how children are educated. In what ways can practice inform policy? Recognizing that policy decisions are made at different levels, we have facilitated cases with state senators, city officials, superintendents, principals, education preparation programs, and other teachers.

When writing a case, it is useful to consider which level(s) of policy your dilemma addresses and where your case could have most impact.

### Case Facilitation

Remember that the purpose of writing a case is that they will be facilitated in order to open dialogue about the issues addressed. This has implications about how you write your case. Take into account the importance of multiple viewpoints. The case should be designed in such a way that reasonable people can disagree. In your case, you are illus-

trating the results of the many competing pressures that are in play. Your discussion questions should help the facilitator structure a useful discussion.

### Structure for Discussion

1. Describe what happened in the case.
2. Discuss what this is a case of. What is the dilemma faced?
3. Analyze the complexities that arise from the interrelationships among multiple points of view and situational context. How does the policy play out in the implementation in the case's context?
4. Make recommendations. What could the protagonist do? How does the larger system need to be changed in order to enable the protagonist to make a good decision?

## Case Writing DO'S and DON'TS

### DO'S

DO Offer multiple perspectives (i.e., show each major character's perspective)

*The purpose of a case is to stimulate dialogue around competing concerns; therefore, present all the points of view.*

DO Give your characters good intentions

*Remember, your characters have the best interests of the students in mind; however, they may disagree about the best way to accomplish these goals.*

DO Use "lively" writing—make it come off the page.

*Be sure to include vibrant description and realistic dialogue.*

DO Make dialogue realistic (real people cough, laugh, use humor)

*Dialogue can be more engaging than narration. Use your dialogue to show, not tell.*

DO Refer to research

*Have your characters refer to research in realistic ways.*

DO Make data come alive (i.e. contextualize your school data within the story of the case)

*School data, such as demographics, are important, but you should only include data that is relevant to the case.*

DO Include discussion questions

*As the author, you want to help focus your reader on some of the broader issues that your case addresses.*

DO Use past verb tense throughout

*Conventional fiction writing uses third person past tense.*

### DON'TS

DON'T write to convince your reader of your point of view—simply present the challenges / difficulties  
*Remember, you want readers to consider equally valid competing points of view.*

DON'T grind any axes—just "give 'em the facts!"  
*Be careful not to demonize any of your characters or the points of view they espouse.*

DON'T use jargon or shorthand (e.g., acronyms); assume the reader has no specific content knowledge

*Consider that your readers may be non-educators; be sure to spell out acronyms and to generalize local titles for tests and policies.*

DON'T advocate any position (i.e. just present the points of view through your characters)

*You don't want to judge your characters; you want the readers to come to their own conclusions.*

## Central Dilemma, Character, POV Matrix

|   |    |    |    |    |    |
|---|----|----|----|----|----|
| Central Dilemma:  |    |    |    |    |    |
| Point of View:  | #1 | #2 | #3 | #4 | #5 |
|   |    |    |    |    |    |
| Character who presents this POV   |    |    |    |    |    |
| Argument in support of this POV   |    |    |    |    |    |
| Why it's reasonable for this character to have this position (back-story) |    |    |    |    |    |