

A NEWCOMER'S GUIDE TO Western Casewriters' Association (WCA) The Annual Conference¹

WCA's annual conference is similar to the annual meetings of other professional academic organizations. Its members meet once a year for the purpose of critiquing each other's research. Case research incorporates a case study accompanied by an Instructor's Manual (teaching note). After a case has been submitted, blind refereed, and accepted for the conference, the case is distributed to a small group of casewriters whose cases have also been accepted. We attempt to form groups of three to five case participants around similar case subjects or topics. For example, participants with cases focusing on business ethics and social responsibility would be grouped together as would strategy and policy cases, healthcare cases, etc.

In addition to the round table discussions, there are always special presentations that focus on some aspect of case research, writing, publication, or teaching. Participants spend time developing and maintaining a network of contacts, an invaluable source of ideas and support for the case method.

Round Table Assignments, Case Presentations, and Case Discussions

Table assignments are made with an eye toward providing a mix of experienced and inexperienced casewriters. Each roundtable group will include a session chair, and for each individual case a recorder will be assigned on a rotating basis. Group members have the responsibility of reading and critically evaluating all the cases in their groups so that during the meeting they can make constructive and useful recommendations for the improvement of the cases presented. The case sessions usually begin with the session chair determining the time available for the presentation and discussion of each case, typically about 45 minutes. Then, a casewriter will be asked to give a very brief overview of his/her case and its history. This is followed by the other casewriters seated at the table giving comments and suggestions--both written and oral, on how that particular case might be improved for future use and publication. This process continues until all cases have been presented and discussed.

Some participants may become alarmed because the first case discussed often will consume more time than allotted to others. That happens because certain types of comments are applicable to several of the cases presented, but need not be talked about at length when they recur in subsequent cases.

Four Reasons to Attend a WCA Conference

One important reason to submit a case and to attend a conference is to improve your case. The round table discussions provide an opportunity for feedback that otherwise would be difficult to obtain.

¹ We would like to thank NACRA for allowing WCA to modify their original document. We know that our members will find great value in NACRA's insights. This document was written by Dick Eisenbeis and David Rosenthal in August 1997 and modified by Linda E. Swayne in 2003. Jeff Shay (2005) and Duane Helleloid (2011) modified the document for WCA's purposes.

Another reason is that it provides a chance for the casewriter to hone and refine her/his case research, writing, and teaching skills. By participating in a serious, constructive debate over cases, discussants will gain a variety of valuable insights that will assist in the development of the case presented and cases to be written in the future. A third and equally important purpose of the conference is the assistance casewriters receive in making their cases publishable either in a case journal or textbook. A high percentage of WCA cases are published in one form or another every year. A fourth reason is that the casewriter will meet a lot of terrific people--dedicated case researchers, writers, and teachers to whom they can turn for friendship and assistance for years to come.

The Case and Instructor's Manual (Teaching Note)

The case, which must be research based and depict real life events, is simply a short history of a particular situation facing an organization and managers (or administrators) and employees within an organization. The Instructor's Manual (also called Teaching Note), is the intellectual contribution portion of the case. The IM relates the situation and events described in the case to the theoretical constructs within a particular discipline. It outlines the goals and objectives of the case, the courses in which the case has relevance, provides suggestions for using the case in the classroom and identifies alternative scenarios that may lead to reasonable solutions to the problems revealed or hinted at in the case.

There are many different answers for the question of what makes a good case. However, there are some common themes. Good cases should:

- 1) Tell a story. There should be a beginning, background, a middle, and a conclusion.
- 2) Be interesting and able to capture the interest of the reader.
- 3) Be accurate. Cases are histories of decisions and situations. They should report the reality of what happened in an unbiased and non-judgmental manner.
- 4) Generally have a decision focus. They should place the reader in a position of having to consider alternatives and make decisions. However, in some disciplines such as Business Ethics, Business & Society, and Organizational Theory, cases that bring to light complex issues or lead to identification and application of theoretical constructs are highly valued.
- 5) Be self-contained. That is, sufficient information should be contained in the case, or previously assigned material in the course (or its prerequisites), so that students have the information needed to identify reasonable alternatives and make informed decisions.
- 6) Have real characters to identify with within the case. The characters in a case are often the source of a great deal of insight. It is difficult to separate real decisions from the people who are making them.
- 7) Generate conflict. There should be more than one viable option before the decision maker. It is the weighing of pros and cons of identifiable alternatives that generates learning. Conflict should not be created or invented; if it existed in the real situation, report it.
- 8) Be field researched. The detail needed to really understand a situation and all of the richness involved almost always requires interviewing the people who were in the organization at the time the research was conducted. However, sometimes appropriate to rely solely on secondary data.

Once again it should be emphasized that from an intellectual contribution and pedagogical standpoint, the Instructor's Manual is the most important part of the case package. The IM links the field observation of the case to the scientific theory and structure of the appropriate discipline. It should describe the purpose of the case, the courses and situations for which the case is useful, provide identification and analysis of key issues in the case, and report on various teaching approaches. An Instructor's Manual is required by WCA for a case to be considered for the workshop or publication.

Overcoming First-Time Jitters

Always a concern to the WCA newcomer is the intensity of the oral critiques of her/his case during the roundtable discussion. Do not be concerned. First, remember that the case was accepted because the reviewers believed that it had promise and could be developed into a publishable work. In some instances, participant comments and recommendations will require minimum revision. At other times, recommended changes can be substantial and time consuming. Usually, the "worst case scenario" is that the casewriter will have to go back to the subject and develop additional information. Always remain aware that the overriding purpose of these group discussions is to put the casewriter on a path that will make the case as good as it can be.

First time attendees might also experience some undue anxiety because they are expected to critique other cases written by more experienced casewriters. However, they should be reminded that the usual readers of cases are students. If one of the roundtable participants is confused or left hanging, just imagine how the students will react. First-time presenter's ideas and opinions are important, do carry weight, and are of considerable value to even the most experienced casewriter. Most first-time participants may attempt to incorporate all of the comments and suggestions that surface during the discussion of their case, or decide they don't want to use any of them. Your case is your work and you can do with it as you please. However, don't be too defensive. Everybody's case can be improved. Generally, without some revision a case presented at the conference is unlikely to move forward and be published in a journal or in a book. But, as with most reviews, if you have a good reason not to change, then that reason needs to be stated as the case moves forward in the review process.

After you return home from the WCA conference you should immediately begin revising the case and instructor's manual while the comments and suggestions are still fresh in your mind.

Opportunities for Assuming a Leadership Role

For those participants at the conference who wish to become more involved, WCA has leadership positions available. Look at the page in the conference program listing the officers, and inform one of them of your interest. In addition, we encourage WCA participants to become active in one of our national and regional affiliates and associate organizations. These include the North American Case Research Association, the Eastern Case Association (Eastern Casewriters), the Southeastern Casewriters, and the Southwestern Casewriters. NACRA is a national organization that we highly recommend WCA participants consider for future conferences. Participation in any or all of these groups is encouraged, and will assist participants in accomplishing many of the same goals they had in joining WCA.