



7th International Conference on Intercultural Education “Education, Health and ICT for a Transcultural World”, EDUHEM 2016, 15-17 June 2016, Almeria, Spain

## The use of case studies as a teaching method in Brazil

Minniti, L. F. S.<sup>a</sup>, Melo Jr, J. S. M.<sup>b</sup>, Oliveira, R. D.<sup>b</sup> & Salles, J. A. A.<sup>b\*</sup>

<sup>a</sup>INVISTA, São Paulo, Brasil

<sup>b</sup>UNICEUMA, São Luis, Brasil

---

### Abstract

This paper presents a proposal of application the teaching case method. This method, based on case studies, helps to develop the arguments to a point of view. The case study is defined as an in depth exploration method of realities (cases); presenting investigative analyses. This method promotes critical thinking, encourages debates and stimulates teacher and students interaction. This article presents the teaching case method and a brief history of the case method in Brazil. This work was conducted through literature review and ends with a proposal of application of the method as an active learning strategy. Conclusions point the feasibility of the method as a teaching strategy.

© 2017 The Authors. Published by Elsevier Ltd. This is an open access article under the CC BY-NC-ND license (<http://creativecommons.org/licenses/by-nc-nd/4.0/>).

Peer-review under responsibility of the organizing committee of EDUHEM 2016.

*Keywords:* Case Study; Teaching Case; Didactic and Pedagogical Methodology.

---

### 1. Introduction.

This paper aims to stimulate the debate on teacher and student interaction through the presentation of the methodology of teaching case as a didactic and pedagogical alternative in classroom. Based on several authors (Roberts, 2001; Gil, 2009; Martins, 2007; Rodrigo, 2008; Ventura, 2007; Fagundes, 2009; Yin, 2005; Wang & Wang, 2001) the teaching case is a powerful methodology for management classes, once it makes possible to establish a link between the learning environment and the real world of organizations, favoring the development of cognitive skills in the students through analysis, synthesis and judgment, encouraging them to be active protagonists in the learning process.

---

\* Corresponding author. Tel.+00 55 19 981320440.

E-mail address: [jasalles@terra.com.br](mailto:jasalles@terra.com.br)

The case study is defined as immersive exploration method of realities, presenting investigative nature. Its operation can be driven by one or more provocations, which may arise along the immersion experience, posing new outlines and analyzes. So, the case study as a teaching strategy enables the experience of data collection and its systematization, placing the student in the context where the phenomenon analyzed happens or expressed.

The case study approach implies in a closed and prolonged contact of the researcher with the situation or object of the research. It requires accurate practices for reading angles relevant to the exploration of the problems and to propose solutions. In fact, the case study allows penetration into a social reality, not fully achieved by a sample survey and exclusively quantitative evaluation.

Gil 2005 defines the following steps: problem formulation; set a unit case; determine the number of cases; protocol development; data collection; review and analysis; and preparation of the report. Vasconcelos (2012) suggests the following steps: planning; choose and definition of unit case; formalization of the study protocol; immersion on-site observation; data collect; data organization; analyze and discussion; drawing the conclusions from the theoretical framework and results.

A practical case study still demands skilled researchers in the topic object that motivated the study, capable to understand the reality investigated. The case study as a teaching strategy must be orchestrated by the experienced teacher, with the active participation of the students.

A single unit case has the potential to house different lines of development, circumscribed in well-defined limits. This means that the same problem situation can be evaluated from different perspectives, which makes them always particular cases. Case studies when adopted as a research strategy ranging from simple studies to those complex and abstract. What matters is the peculiarity of the analysis.

Vasconcelos (2012) defines the case study as a prospective analysis, including: articulation of the contents in different disciplines; connection with business reality; critical in assessing problems; obtaining backing for the decision-making process, considering a larger universe of variables.

The case studies deliver interpretations, explanations, descriptions, comparisons, evidence that contribute to the clarification of outstanding issues and thematic provocation. Its application is a preliminary exercise in the decision-making process, sharpening his critical perspective, assessing the contribution of management techniques, an inductive approach.

## **2. Case study, case method and teaching strategy.**

The case study is a qualitative research technique that has turned its attention from the search for a diagnosis of a case. The case method, in turn, presents educational purposes and serves mainly to illustrate concepts and develop skills in students, and may also be drawn from a case study. The case study, in line with a research method, not to be confused with a teaching strategy since this latter condition requires involvement, full immersion in the reality investigated or explored. It also does not match the case method, where the real situations are presented to students for analysis and discussions, without flexibility to intervene in reality or even possibility of perception spot. In fact, the method is implemented in the classroom.

The case method consists of an educational strategy whose aim is to get students to reflect on situations presented in the case and may involve making decisions about the episode studied. The aim of the technique is basically present a problem to the students, making the analyze and reflect on the subject.

### *2.1. Case study as a method of research.*

Investigate very specific and limited objects contextualized in temporal and spatial dimensions. The student researcher co - participates in the planning and design of the study most of the time process, but in some cases their autonomy is relativized by the frequent interventions of the teacher or the imposition of a rigid model. It requires in-depth knowledge of the unit case, but not necessarily, a full immersion. It includes multiple dimensions of analysis.

## 2.2. Case study as a method of teaching strategy

Objective learning and professional growth, as well as understanding of labor practice. The student has autonomy in the planning and design of the study process. The teacher's role is to guide and mediate the process of comparing and contrasting realities. The protocol comes from the discussion and negotiation process. Deep integration with the unit case. Complete immersion in that reality to systematic and prolonged observation. It houses different analytical perspectives, as defined protocol and guidelines the pedagogical level.

## 2.3. Case study general concept.

Its purpose is to prepare for the assessment of complex situations and decision making. The teacher presents the description of the situation. The student is limited to review of documents submitted, guided by questions or points established by the teacher, although this direction is a rule. Does not require integration with the unit investigated the case. The cases can be evaluated by different points of view.

## 3. The Teaching Method in Brazil

Despite the scarce number of Brazilian authors that produce teaching case, the interest has increased with the proliferation of courses in Administration and due to the search for methods of active learning.

Since 2007 the National Association of Post-Graduate Studies and Research in Administration – ANPAD accepts the submission of teaching cases for your most significant Congress, the Annual Meeting of the National Association of Post Graduate Studies and Research in Administration (EnANPAD). The Journal Revista de Administração Contemporânea –RAC (Journal of Contemporary Management) has a special section dedicated to them.

A bibliometric study developed by Faria & Figueiredo (2013) analyzed the publications of teaching cases during the period 2007-2011 at EnANPAD, EnEPQ (Teaching and Research in Administration & Accounting Meeting) and in the Brazilians journals with high impact until B2 according to CAPES classification.

The result confirms the small number of publications of teaching case in Brazil as shown the table below:

Table 1: Teaching Cases Published in Education Journals and Annals of Congress in Brazil Source: Adapted from Faria & Figueiredo (2013, p.185)

Congress and Journals	Number of teaching cases published
Annals of EnANPAD 2007	24
Annals of EnANPAD 2008	18
Annals of EnANPAD 2009	11
Annals of EnANPAD 2010	17
Annals of EnANPAD 2011	8
Annals of EnEPQ 2007	0
Annals of EnEPQ 2009	12
Annals of EnEPQ 2011	12
REAd (Electronic Journal of Business Administration)	1
RAC (Journal of Contemporary Management)	19

The authors found that in 2007, when Anpad accepted for the first time teaching cases on its main congress, EnANPAD, the cases represented 2.5% of total papers accepted for presentation and subsequent publication in the Annals of Congress. After this year until 2011 the publication of teaching cases decrease. In 2011 the cases represented only 1% of the total published papers at EnANPAD

Regarding the congress EnEPQ, in 2009 was published 12 cases representing 14.5% of total papers. In the 2011 the cases represented 12% of total approved articles.

In Brazilian academic journals, publication of teaching cases is still very scarce. Only two of the most important journals published teaching cases during this period REAd published only one case, while the RAC published 19 teaching cases.

#### 4. Protocol application.

According to Martins (2008) the steps of the method employed as a teaching strategy are:

##### Teacher:

1. Integration between curricular content and market experiences through field research phase comprising from identifying the possibilities of performance and expertise necessary to operate the recognition of the expectations of the target audience.
2. Selection of content prerequisites to experience.
3. Planning on the implementation of the strategy.
4. Guidance on the composition of protocol case study.

##### Students:

1. systematic study of the basic content and those cross.
2. Composition of the theoretical framework supporting the work.
3. Planning of the study in the light of the review undertaken and guidance of the teacher.
4. Professional Immersion. Observation and data collection.
5. Treatment of data, triangulation and systematization.
6. Analysis and conclusions, through the articulation between content and practice.
7. Presentation of the results and collect feedback.
8. Composition of the case, which could be used as the source for the case method applications, this distinct strategy described.

The protocol defines the design of the study and directs the work of the student, allowing for targeting to the study questions, and corresponds to a year of planning and systematic observation. Use professional guides, parameterizing the immersion approach; avoiding the product case study is limited to a report of facts, devoid of any critical analysis, focused on the discovery and innovation, driven by the need to understand the reality.

The systematization of data imposes criteria and organization, including the process of transcribing reports, comments and opinions from structured indexing predefined parameters laid down in the protocol. It is noteworthy that the strategy of case study as presented does not involve rigid, inflexible protocols.

The document in question is also useful for the preparation of the letter of intent, giving start to dialogue with the market.

We highlight the case study does not correspond to an oversight or inspection, because of its strong constructivist and critical component, since it provided a learning tool assumes didactic function, complementing the experience in the classroom. This mediated contact with the professional reality has the potential to prepare the student for the internship experience by providing ripening.

The uncompromising look with institutional linkages prevents contamination and influences the composition of interpretations, usually resulting from employment relationships, beliefs and values. Actually produces the opposite effect, extends the lens of analysis, inciting varied and not predicted thoughts about the object of study. The use of the method as a teaching strategy shifts the control of the teaching-learning process for the student, forcing him to plan and prepare their track learning, leading the teacher to acting as advisor and mediator realities. This is where the reflections of the experience differ from those produced by the case method. One hopes that the case be a catalyst for construction and not exclusively for discussion.

There are two categories of information on a case study: those of argumentative support and secondary support. Information argumentative support structure that make up the shaft fieldwork, giving identity to the study. One of the fundamental attributes of a case study is the existence of well-defined limits, the light of a theoretical axis of development and elaborate planning.

Information for secondary backing are those relevant to the context or even and characterization of unit case. Their contribution should be dosed to not entail the loss of focus. Gil (2004) highlights this last item as a constraint, however, it is understood that the continuing review of studies from the need to follow trends, the evolution of knowledge itself.

The effectiveness of the strategy is a direct function of the quality of planning and study protocol, commitment, motivation, autonomy and predisposition of student learning. It requires discipline, initiative and dedication. The reconfiguration of the role of the teacher in this approach is critical.

The development of case studies is hampered by difficulties or restrictions, especially the time needed for its preparation and immersion. This feature does not absolve the facility of the debate on the appropriate conditions for the method in the local context, contemplating on the applicative analysis limitations. The methodological background is important, but without losing sight of the quality parameters and necessary for its achievement structural demands.

## 5. Conclusions

It was proposed in this paper, the case study as a didactic - pedagogic strategy constructivist approach, provided immersive experience. The complementarity of the features of the method and the demands of the Administration area qualify.

This paper aims to stimulate the debate on teacher and student interaction through the presentation of the methodology of teaching case as a possible alternative to streamline the education of business administration in classrooms. The teaching case is a powerful methodology for business administration classes, once it makes possible to establish a link between the learning environment and the real world of organizations, favoring the development of cognitive skills in the students through analysis, synthesis and judgment, encouraging them to be active protagonists in the learning process.

Despite the importance given to this method in the literature and in other countries such as United States where recognized universities applies the method in a regular basis, in Brazil it's still very scares the author and published paper with this method.

The case study as a teaching strategy enables the experience of data collection, its systematization and difficulties by placing the student in the context where the phenomenon analyzed happens or expressed.

The methodological arrangement of a case study is complex and chained, often driven by questions like 'how' and 'why'. In order to answer such questions, the reality is preserved during analysis, without giving the potential intervention of the student.

The proposal redeems the contributory potential of students in constructing meaning from the connection with the market reality. The student is not a passive element in the learning process.

The concatenated arguments converged on the feasibility of applying the method as a teaching strategy, but points to the need to rethink aspects related to the conditions of application because of limitations in this study mapped.

## References

- Fagundes, T. C. P. C.(2009). Metodologia de pesquisa: especialização em EAD. Salvador: UNEB/EAD.
- Faria, M. & Figueiredo, K. F, (2013) Casos de Ensino no Brasil: Análise Bibliométrica e Orientações para Autores RAC. 176-197.
- Gil, A C.(2009) *Estudo de caso*. São Paulo: Atlas.
- Gil, A C.(2009). Elaboração de casos para o ensino de administração. *Revista Contemporânea de Economia e Gestão*. Vol.2 - Nº 2 (07-16), jul-dez 2005.
- Martins, G. A.(2008). Estudo de caso: uma reflexão sobre a aplicabilidade em pesquisas no Brasil. RCO - *Revista de Contabilidade e Organizações* – FEARP/USP, v. 2, n. 2, p. 8 - 18 jan./abr.
- Roberts, M. J. (2001). *Developing a Teaching Case*. Harvard Business Publishing.
- Rodrigo, J. (2008). *Estudo de caso: fundamentação teórica*. Brasileira: Vetscon editora.
- Ventura, M. M(2007). O Estudo de Caso como Modalidade de Pesquisa. *Revista SOCERJ*. 20 (5): 383-386
- Wang, S., & Wang, H. (2011). Teaching design thinking through case analysis: joint analytical process. *Decision Sciences Journal of Innovative Education*, 9(1), 113-118.
- Yin, R. K. (2005). *Estudo de caso: planejamento e métodos*. Porto Alegre: Artmed.