

# ПЕДАГОГІЧНІ НАУКИ

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Batryn Natalia

Ternopil National Economic University

## CASE STUDY METHOD IN TEACHING ORGANIZATIONAL BEHAVIOR IN UKRAINE

**Summary.** In this article, the author investigates the use of case study method in teaching of Organizational Behavior in Ukraine. Organizational Behavior (OB) is a discipline that explores human behavior in a work environment and examines its impact on job performance, communication, motivation, and leadership in the workplace. Both simple scenario-based cases and complex detailed cases can assist effectively in delivering the main themes of the discipline. Analysis of Ukrainian OB text-books and OB educational programs (syllabi) showed that Ukrainian authors focus more on the theoretical part of the discipline. Though many instructors in Ukraine use case-study technologies, the content of the cases is seldom aligned to Ukrainian organizational culture and lifestyle. Therefore, it influences the process of discussion, analysis, and problem solving. The purpose of this article is to investigate how the case study method is explored and applied by Ukrainian instructors and researchers and to encourage the Ukrainian scholars to pay closer attention to the applicability of the method in practical classes, particularly, in teaching the OB course.

**Keywords:** organizational behavior, case study method, active learning approach, work-with-a-case technology.

Батрин Н.В.

Тернопільський національний економічний університет

## ВИКОРИСТАННЯ МЕТОДУ УЧБОВИХ СИТУАЦІЙ (КЕЙС-МЕТОДУ) У ВИКЛАДАННІ ОРГАНІЗАЦІЙНОЇ ПОВЕДІНКИ

**Анотація.** В цій статті автор досліджує використання методу учбових ситуацій (кейс-методу) на заняттях з дисципліни «Організаційна поведінка» в Україні. Кейс метод – це інтерактивна технологія, що базується на основі дискусії та аналізу реальних чи вигаданих ситуацій з метою засвоєння теоретичного матеріалу та формування при цьому нових вмінь та навичок аналітичного, критичного та креативного мислення. «Організаційна поведінка» – це дисципліна, яка вивчає поведінку людини в робочому середовищі та її вплив на результати роботи працівників, спілкування, мотивацію, лідерство тощо. Метою викладання дисципліни є опанування прийомів та методів управління поведінкою особистості в організації, набуття умінь аналізу групової (міжгрупової) та командної роботи; розробки напрямків розвитку організаційної культури та управління організаційним розвитком. Використання методу учбових ситуацій є доцільним, ефективним та дієвим і може суттєво допомагати в досягненні мети вивчення цієї дисципліни. Аналіз українських підручників з «Організаційної поведінки» та навчальних програм курсів «Організаційної поведінки» показав, що українські автори зосереджуються більше на теоретичній частині. Хоча багато викладачів в Україні використовують учбові ситуації, зміст кейсів рідко узгоджується з організаційною культурою та стилем життя України, що суттєво впливає на процес обговорення, аналізу та вирішення проблем. Частіше використовуються кейси на основі вигаданих ситуацій та нереальних подій чи організацій. Проте творчий підхід до викладання та можливості мережі Інтернет можуть суттєво допомогти викладачам віднаходити проблеми та ситуації, що відповідають тематиці дисципліни. Мета цієї статті дослідити, як застосовують українські викладачі метод учбових ситуацій на заняттях з даної дисципліни. Застосування кейс-методу на заняттях з «Організаційної поведінки» збагачує зміст дисципліни. Проте як свідчить досвід зарубіжних авторів, саме ситуації засновані на реальних подіях, організаціях, та особистостях є цікавішими для студентів і тому ефективнішими в навчанні.

**Ключові слова:** організаційна поведінка, активні методи викладання, метод учбових ситуацій, кейс-метод.

**Problem statement.** The use of case studies in business, law, and medical schools proved to be an effective technique. However, the method can be used in teaching any discipline that is aimed to develop students' analytical thinking, problem-solving, and decision making. Organizational Behavior is a discipline that explores human behavior in a work environment and examines its impact on job performance, communication, motivation, leadership, etc. Both a simple scenario-based case and a complex detailed case assist effectively in delivering the main themes of the discipline and are properly aligned well with the course objectives. Many instructors in Ukraine use case-study tech-

nologies. However, the content of the cases is seldom aligned with Ukrainian culture and lifestyle. Therefore, it influences the process of discussion, analysis, and problem-solving.

**Literature review.** The case study method does not belong to the tools that can be called innovative. Harvard Business School established its case study method in the 1920s and today in most business schools the instructors use cases to teach business. However, the history of the case study method is definitely longer starting at least with the Socratic Method also known as a case method [7]. According to C. Herreid, the definition of a case study varies enormously. The author wrote that "having strug-

gled with that very topic for many years early in the game, I believe it is important to get to the heart of the matter right from the start. It took me some time to reach my present broad definition, which is: “A case study is a story with an educational message” [8, p. 27]. It will be fair to say that the case study method evolved from teaching based on Socratic principles and today the application of the case method is very extensive being widely applied in teaching different disciplines. For example, L. Burko (2016) investigated its application in teaching college physics. The case study method is included in the introductory calculus-based and algebra-based physics courses at Georgia Gwinnett College. The author stated that “the richness and versatility of this method extend far beyond the original Socratic interrogation, which was brilliantly featured in the movie and follow-up television series *The Paper Chase* by Professor Kingsfield” [5]. Z. Ozdilek (2014) investigated the use of case study teaching in the chemistry courses. The author emphasized that the case method “allows students many benefits, specifically regarding how to learn by doing, which is believed to be one of the best ways to integrate new knowledge” [13, p. 696]. K. Bonney (2015) proved that case studies are “more effective than classroom discussions and textbook reading at promoting learning of key biological concepts, development of written and oral communication skills, and comprehension of the relevance of biological concepts to everyday life” [3, p. 846]. P. Asquith and L. Weiss (2019) analyzed the use of case study approach to financial tools, financial policies, and valuation [2]. Thus, despite the long history, the case study method is still popular in recent research of scholars who investigate various areas and differ in their research focus.

Case studies are ideally suited to teaching the OB course. In their research study, Brown, Charlier, Rynes, and Hosmane (2013) examined the syllabi of 241 required OB related classes in full-time U.S. MBA programs. The researchers discovered that there was a large variation in cases used with 315 cases in the 87 syllabi. The average number of cases per course was 4.6. There were courses using no cases and others relying on them extensively [4]. Based on their findings, the authors offered the following recommendations:

- to broaden the sources of readings and cases in OB-related courses;
- to supplement content with education in which students receive practice in doing and reflecting on the reasons for (and implications of) their actions;
- to create syllabi that will more effectively aid learning [4, p. 464–466].

The authors stated that OB scholars have long been distinguished by their enthusiastic interest in teaching OB as well as conducting research about it. In 1974, OB instructors at Stanford and the University of California–Berkeley organized the first OB Teaching Conference. There were attendees from 15 prominent American universities. As a result, the Organizational Behavior Teaching Society (OBTS) was founded. Its current mission is “to enhance the quality and promote the importance of teaching and learning across the management disciplines with a focus on the dynamics within and at the interface of individuals, groups, organizations, and cultures” [4, p. 448].

For the last two decades, the case-study method has been intensively explored in Ukraine. Yu. Surmin emphasized the benefits of using the case study method in Ukrainian educational space and defined the types of cases and dominant functions of cases. The author stated that the need for the application of the case-study method in education is urgent due to the generalization of educational processes and lack of focus on development of skills and abilities, such as the ability to learn, process huge amounts of information, and think critically [16, p. 28].

N. Stepurko and O. Ignashchuk analyzed the case study application as a teaching method and stated that it is “one of the active learning approaches considered as a more effective way to develop professional skills and achieve learning outcomes than traditional teaching methods” [15, p. 71]. The authors revealed that “interactive teaching methods require more responsibility and involvement of students in the educational process and it is not always typical for Ukrainian context” [2, p. 72]. The authors investigated the use of this method in health care management courses. O. Tulska investigated the use of the case study method in the formation of the professional culture of ecologists. The author analyzed the challenges that professional ecologists face due to dynamic and often unpredictable situations. The professionals are expected to have such skills and abilities that can be developed only in conditions as close as possible to real life. [17, p. 187]. O. Antonova explored the classification of cases and their use in teaching. The author developed work-with-a-case technology and defined video case study features. The researcher highlighted that a case-study is a problem-solving method that is based on specific examples or situations and allows students to apply theoretical knowledge to solving practical problems. The case is a real situation that may arise in a certain field of activity and it is aimed to make a teacher and students work together to find a solution [1, p. 28].

**The purpose of the article** is to investigate how the case study method is explored and applied by Ukrainian instructors and researchers and encourage the Ukrainian scholars to pay closer attention to the applicability of the method in practical classes, particularly, in teaching the course of Organizational Behavior.

**Main material.** Research on OB has a long history. It is difficult to identify the year at which OB became a distinct discipline. According to Miner (2006), it could be in the 1940s in the USA [11]. Now it is taught in every management program. Obviously, American researchers thoroughly explored the area and have a great experience. Besides, many American text-books on OB became best-sellers at the beginning of 2000. J. Greenberg and R. Baron published the first edition of their *Behavior in Organizations* in 1995. In the 8<sup>th</sup> edition (2003), the authors wrote that the book is a blend of research, theory, and practical application and named the field of OB the ultimate reality show because it is constantly adjusting to reality [6]. Each chapter contains two cases. Many cases are completely new or updated in each new edition. There is one case at the beginning of the chapter and it is called *Preview Case*. It is designed to set up the material that follows by putting it in the context of a

real organizational event. At the end of each chapter, there is a second *Case in Point*. It is designed to review the material presented in the chapter. Its purpose is to bring that material to life. All the cases are drawn from real life. For example, there are the following cases: In Part 1, the *Preview Case* is "Pharmacia: where People are the Prescription for Success" (based on the story of the Monsanto Company, an American agrochemical and biotechnology corporation. *Case in Point* is "No Business like SHOYU Business". It is about Kikkoman – one of Japan's oldest and largest companies [6, p. 35]. In Part 2, the *Preview case* is "Preparing Sales for the Real Whirled". This is a story of six women and two men who lived together in a small house in St. Joseph, Michigan washed their clothes, prepared their meals, and cleaned their house using only Whirlpool products. The *Case in Point* is "Finding a Safe Way to Smile at Safeway" is about a Safeway store in California. Overall, there are 15 *Preview Cases* and 15 *Cases in Point* in the text-book. All of them are based on real organizations' experiences and bring the theoretical material to real life.

In order to create a Canadian edition of *Organizational Behavior*, S. Robbins and N. Langton have revised the entire research base from the 8<sup>th</sup> American edition and included the research of Canadian scholars where possible. They have added new examples that come from Canadian firms. Revealing the underlying theories of *Organizational Behavior* and providing Canadian examples that illustrate those theories, the authors went a step further asking the questions of how those theories apply in Canadian workplaces. For example, in Chapter 1, the case study is about the president of Toronto-based specialty coffee retailer Second Cup Limited. In Chapter 2, the case study is about the first woman to rise to a high level in the male-dominated auto industry, Maureen Kempton Darkes, the head of General Motors Canada. In Chapter 3, a story of Frank Stronach who was born in Weiz, Austria but moved to Canada at the age of 22 with 200\$ in his pocket and within two years he had scraped together enough money to start Multimatic Investment Ltd, a small automotive tool-and-die shop located in the east end of Toronto [14].

The text-books of Ukrainian authors present relevant content and are mostly research-based. For example, in the textbook *Organizational Behavior* compiled by Lepeyko T., Lukashev S. and Myronova O., there are six main chapters. Each chapter ends with Questions for Self-control and Practical Exercises (personality tests) [10]. *Organizational Behavior*, written by Molchnova A., Volyanyk I., and Kondratyeva V consists of five parts. Each part has three chapters. The chapters start with the main questions that it focuses on. Then the theoretical material is presented. At the end of the chapter, there is a section called Methodological Examiner that includes questions for students' individual work, some tasks and tests to solve, creative tasks, and references. Overall, the section summarizes well the key points of the chapter and makes the students think critically and creatively. However, it also lacks the case studies that could bring the material to real-life [12].

The application of teaching methods is reflected in syllabi for students. The syllabus should be clear

and easily understood by students, provide enough information for students to understand what is expected of them and how the course proceeds. Optimally, the course syllabus contents should be in compliance with other documents (course catalog and policy documents) and text-books, in order to ensure that there is consistency with the educational program. In American Universities, the use of a case-study method is reflected in syllabi in the section Grading that shows the learning activity weight. A similar approach is in Canadian Universities. In Ukraine, the course programs require including a lot of information, such as, the purpose and objectives of learning the discipline, its structure, the content of lectures, the themes of the practical classes, questions for students' individual work, evaluation, etc. Analysis of Ukrainian programs showed that in most of them there was no sign of using a case study method in the seminars or practical classes. However, there were several programs that indicated the use of case studies. For example, in Zaporizhia State Engineering Academy, the OB course program includes interactive methods. In the program, they are named psychological games or solving a conflict situation. The descriptions are very close to the cases and can be called the case studies but they are not based on real organizations and real events. For example, the name of the case is "Shame". Situation: the supervisor constantly finds some mistakes in the work of the subordinate. And, despite the fact that the work is 99% done very well, accuses the subordinate of the failure of the whole task. The employee feels guilty, begins to apologize and he forms a complex of inability to perform work at the request of the supervisor (the position of the victim). The objective of this case study is to determine the problem solving strategy being in both the role of the supervisor and the role of the subordinate.

**Results.** Analysis of Ukrainian text-books on OB and educational programs (syllabi) on the course of OB showed that Ukrainian authors focus more on the theoretical part of the discipline though trying to add creative tasks, psychological tests, and games. Ukrainian scholars investigating the case study method pay more attention to its methodological side, classification, and application. However, this research area lacks the articles devoted to the development and creation of cases based on Ukrainian real organizations, their culture, performance, leadership, etc. Besides, the authors of OB text-books could have included updated cases based on situations in Ukrainian organizations. On the Internet, there is a plethora of sites devoted to case-study writing that give good tips and recommendations on how to develop a good case study in different fields of study (in English). There are also sites that give professional case study examples (design tips and templates). For example, Resilient Educator, a virtual space that understands the needs of teachers and the importance of *resilient educators*, with content and resources created by real educators with real experience [9]. The educators define that the purpose of a case study is to walk the reader through a situation where a problem is presented, background information provided and a description of the solution given. The goal of the writer is to give the student (reader) ex-



periences similar to those the writer had as he or she researched the situation presented.

Several steps must be taken before actually writing a case:

1. Choose the situation on which to write.
2. Gather as much information as possible about the situation.
3. Analyze all of the elements surrounding the situation.
4. Determine the final solution implemented.
5. Gather information about why the solution worked or did not work [9].

The authors share the effective tips on how to describe the situation/problem, give background information, describe solution, evaluate the responses to solutions, and tell the whole story.

Thus, the case study method is an effective tool because storytelling has already proved its influence on learners. According to C. Herreid, “storytelling as a method of education has much to recommend it. It is teaching in context. Aesop knew it. Homer knew it. We are storytelling animals. The Bible is the most widely published book in history:

It is filled with one story after another. Arguably, one can make the case that its great appeal to the public is not because it is a deep philosophical treatise but because it is a profound storybook” [8, p. 1].

**Conclusions.** The use of the case study method is important in teaching OB because the discipline is directly concerned with human behavior in the workplace. The cases based on real-life situations and events help gain a better understanding of a subject or process under discussion. The case study method has been in the research focus of Ukrainian scholars for several decades already, however, it is urgent now to shift the focus to writing new cases based of Ukrainian lifestyle and creating the updated collections of cases that will be effectively used in teaching OB. Analysis of Ukrainian OB text-books and OB educational programs also showed that Ukrainian authors focus more on the theoretical part of the discipline. It is critical to use the experience of foreign authors and include the cases into the OB textbooks so that the students could get used to generate an in-depth understanding of complex issues in the real-life context.

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