// STRATENOTES

A National Newsletter for SIM Trainers

Volume 4, Issue 6 - March, 1996

Using Cases As the Basis for Teacher Learning*

"[A case] brings a sense of reality to our readings and makes it easier to understand the philosophies and ideas."

"It helped me to get a better understanding of the students I work with."

"They really got me to think actively about the material."

"Since I have not begun teaching yet, the case studies helped give me an idea of some possible things I can expect."

For years, we have been looking for ways to help teachers face change as they are learning to implement new practices that may be difficult. One method that we have found to have particular merit is based on the use of cases or "teacher stories" to help teachers think about and explore implementation issues. For this reason, in this issue of Stratenotes we are introducing some ideas about using cases . We hope that you will consider using cases in some of your SIM training sessions.

How do "Cases" work in SIM training?

Teachers can write cases; teachers can read and discuss cases. Both activities can be used in SIM training.

One way to use cases to promote teacher learning is to ask teachers to write a case about a teaching experience implementing a SIM component. Many times, the assignment to write a "case" or "a story about your teaching," can replace a strategy implementation log. The case, however, will require more reflection and interpretation. Many teachers may feel that "case writing" is a daunting task, therefore, the option of developing a "case" or keeping an implementation log may be offered to teachers.

Many schools are developing school-based staff-development programs. Case writing and discussion can be a powerful staff-development technique. One adaptation to the case writing approach is for teachers to develop case notes, then to tell a story or present a "case" orally to a group and finally to discuss the problems and issues as a group. Such a model has been developed and used very successfully by the GST Service District located in Portland, North Dakota.

The staff at the GST Service District decided to implement a case-based staff development workshop to promote inclusive education for the schools in their rural region. To prepare for the workshop, a regular and general educator team identify a problem that they are experiencing with one student regarding inclusion. The team prepares a typed description of the problem, including what has been tried, what has worked, what has not worked, and one question that they would like to have answered. The case information is sent to the workshop facilitator and copies are made for each member of the workshop. Teams from a variety of schools and from all school levels attend. At the workshop, each case is processed and discussed team by team. First, all members are given five minutes to review the case. Second, the regular education teacher from the presenting team has two minutes to summarize the students and restates the question about the problem. Third, the group has five minutes to ask questions about the student and the problem. Fourth, the group has five minutes to generate solutions to the problem. Fifth, each responding team provides its suggestions. The suggestions are listed on an overhead by the moderator while the presenting team listens quietly. Sixth, the presenting team has one minute to comment and state what they think might and might not work about the suggestions. Seventh, the moderator concludes the discussion and provides his or perspectives and makes suggestions if the moderator has experience in the area. The next case is then read and the process is repeated until all the cases have been processed. At the end of the session, each teacher in the room must state and describe one intervention that was heard throughout the session that will be taken back and tried.

In most situations, trainers will find the discussion of cases to be the most useful training activity. A trainer who uses case discussion will locate a case, usually a very short case, that describes how a teacher implemented and struggled with a challenge. The case should relate to a struggle that will relate to the group of teachers that are currently being trained. The challenge can be based on a classroom problem, a building problem, or a problem that stems from outside of the school but has an impact on teaching. For our purposes, we will concentrate on the idea of using cases to explore a problem related to implementing a SIM component, such as a learning strategy or a teaching routine. For example, a case may be about how a teacher struggled and learned to implement PIRATES with a group of 10th graders, or the case could be about the trials and tribulations that a teacher had with one student in the regular classroom as the Unit Organizer Routine was used.

Once the trainer locates the case, the trainer reads the case and identifies some of the underlying issues that are represented by the case. The case is then used in a SIM training session. A case is used after the strategy or routine has already been presented to teachers, they are familiar with the content, and are personally struggling with implementation. The case is used to help teachers brainstorm issues and solutions. A case describing lots of problems with implementation is usually not used to introduce a strategy or a routine; initial training in the strategy should focus on learning the content. A case presenting general classroom problems and illustrating how a routine or strategy might solve a problem or fit into a classroom or a case showing successful implementation of a strategy or routine may be used as part of the introduction to a strategy.

Once the case is introduced, the trainer leads a discussion by asking participants to identify the issues and suggest what is happening in the case. Case discussion involves what teachers do constantly — namely, forming interpretations or "making meaning" from classroom experience (Wassermann, 1993). Because individuals view experiences differently (influenced by such factors as our own background and culture, experiences as a learner, etc.), cases will convey different meanings to different people. It is important to understand that we each bring a different set of lenses to our reading of a case and that personal factors may influence our perspective. The following suggestions can help a trainer prepare and guide a case discussion.

Guiding Case Discussions

Selma Wasserman suggests it is useful to approach our understanding of a case, or of a classroom experience, as a process of forming hypotheses. This process includes:

1. Observation of data (e.g., learner behavior, classroom environment),
2. Comparison of this experience to others,
3. Consideration of main ideas we might extract from the experience, and
4. Intuition

We use these four ways of thinking or gathering information to guide our hypothesis-testing about the meaning of a case.

Wasserman also encourages us to monitor some ways of thinking that can get in the way of this process. As facilitators, we should caution group members about these habits and help participants identify them as they occur in discussion.

- Making assumptions
- Generalizing from one or a few instances to an opinion or conclusion
- Failing to realize our inflexible thinking has influenced an opinion
- Basing a conclusion on personal belief or bias, rather than the accumulation of information
- Drawing hasty conclusions

Points to consider. The following questions will help determine what ideas or information would be most beneficial for a particular group, the starting point for discussion, etc. ... as well as which case you select.

What is the role of a facilitator in case discussions?

- To invest time up front to plan
- To promote learning and self discovery—NOT to produce "right" answers
- To encourage participant thinking—NOT to be the expert
- To encourage interaction among participants
- To help members learn in an atmosphere where a fruitful, open, and safe exchange of ideas can take place.

Who are the individuals involved in the discussion?

- Is there relative homogeneity or heterogeneity in the group?
- How extensive is the teaching experience of individuals and in what kind of setting have these experiences occurred?
- What are the personal backgrounds of individuals? (cultural, ethnic, gender, economic, urban/rural, education, learning differences, etc.)
- Have any individuals had experience with cases?
- What is the comfort level in the group for expressing personal opinions?

What ideas about teaching or learning would most benefit this group?
For instance ....

- Would this group benefit from seeing a concept illustrated in practice?

- Does this group need to see how complex teaching really is?
- Would it be helpful to discuss why a particular teaching strategy worked or didn't work?
- Might a case help the group understand how what we do as teachers affects learners?
- Does the group need more help in understanding the problem-solving process a teacher experiences?
- Does the group need to develop a better understanding of a particular kind of learner or group of learners?
- Does the group need to develop a better understanding of cultural diversity among learners, and to understand how this knowledge contributes to more effective teaching?

Prior to Discussion:

- Group participants should have had a copy of the case with enough time to read and think about it.
- Provide participants with questions to guide their thinking.

Discussion environment

- Use a chalkboard or flip chart for the facilitator to record discussion points.
- Arrange chairs so group members may talk to one another easily. A U-shaped seating arrangement can allow the facilitator to walk among the group.

Time: Allow a minimum of 1 hour for discussion. Allow more time if you plan to use small groups or other exercises with a large group.

If an hour is not available, then a short scenario may be used, followed by a more abbreviated discussion of issues. The same points could be explored but the discussion will not be as rich.

After choosing a case: How to prepare

(1) Read the case several times, or enough times to become thoroughly familiar with the individuals involved and what occurs. These questions can guide your analysis:

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- Who are the main people involved in the experience, what parts do they play?
- How do these people express themselves and behave? What were the students (teacher) feeling or thinking? How did they communicate these thoughts and feelings?
- With whom does an individual interact, and how would you describe the nature of their interaction or relationship?
- What action occurs among individuals; what ideas are expressed directly or implied?
- When and where does this experience occur? Do these factors seem important?
- Why do the individuals do what they do? What instances or details in the case support your ideas about this motivation?

(2) List some possible "meanings" the case may hold and identify examples or data from the case to support these meanings.

(3) Consider the composition of the group that will discuss the case. What points or meanings might they miss, given their backgrounds and experience?

(4) Plan the discussion, outlining what you view as main points and a meaningful progression of those points. The analysis questions above in # 1 (who, what, etc.) can be good places to start.

(5) Develop questions that will elicit discussion and emphasize what you think are the important points.

(6) Guiding the discussion:

- Elicit the main facts or information about the case, using the analysis questions (who, what, why, etc.) in # 1 above to prompt discussion. You may list the main points on the board or flip chart.
- What did the teacher do? What were the results of the teacher's actions?
- Identify the problems in the case and the probable causes of the problems. What risks did the teacher take?
- Identify the solution(s) in the case, and then elicit alternative solutions from participants. Look at various decision-points in the case and their consequences will help this process. What risks were or might be involved?
- Help participants identify principles illustrated in the case.
- Elicit the meaning(s) the case holds for participants.
- Consider cultural views. What, if any, cultural perspectives influenced the teacher's views or

behavior? The students' views or behavior?

- The facilitator may encourage participants to articulate the values and beliefs that have informed their views (e.g., how do you see the teacher-parent relationship? under what circumstances would you change a grade?).
- Elicit personal experiences from group members. Have you run into a similar situation? What happened and how did you manage the problem? Did any information in this case or discussion suggest an alternative plan you might have followed?
- Elicit what participants may have learned from the case—an idea, new way of thinking, practical information.

(7) General guidelines for facilitators:

- Be a facilitator — elicit ideas, encourage thought — rather than being the expert. Avoid criticizing and judging — these behaviors will discourage discussion.
- Convey your respect for participant opinions by listening carefully and reflecting your understanding of their ideas. You may reflect this understanding nonverbally or verbally.
- Encourage all group members to contribute.
- Point out similarities and differences among perspectives/ideas generated. When appropriate, synthesize views or reframe to clarify.
- Keep bringing discussants back to the case, asking for examples or the source of their ideas/opinions.
- Inquire about alternative views.
- At some point, you will likely need to make the point that there are no "right" answers. Cases, as life, are complex and there are any number of ways to deal with an issue. There may also not be any clear-cut way to deal with a particular problem.

These ideas were drawn from several sources on case writing and case discussion, particularly: (1) Selma Wasserman's book, Getting down to cases: Learning to teach with case studies (1993), New York: Teachers College Press, and (2) Amalia Mesa-Bains and Judith H. Shulman, Facilitator's guide to diversity in the classroom: A casebook for teachers and teacher educators (1994), Hillsdale, NJ: Lawrence Erlbaum.

The following case has been written by a beginning teacher about her experiences teaching learning strategies to students. This case can be used to help teachers identify the important issues and solutions regarding the challenge of getting started - on a variety of fronts. What do you like about this case? What are the issues and dilemmas? What are the solutions or potential solutions? What is really happening here? Share your comments in the Open Forum section of StrateNET and we will have a session at the National SIM Trainers' Conference in June to discuss this and other cases and how to use cases in training. Additional case studies will be found in the next edition of *Stratenotes*.

This Case is a Selection From: TEACHERS AS LEARNERS: MAKING A CASE FOR LEARNING STRATEGIES

Compiled by Dr. Juliana Taymans
Department of Teacher Preparation and Special Education The George Washington University

The Evolution of Student Success
Leigh Ann Tyson

I have been a special education teacher for students with emotional disturbance and learning disabilities for six years. Although my first teaching experiences were with predominately middle-class children from my native Connecticut, I have been working with urban children with severe learning disabilities within the District of Columbia for almost two years. In the self-contained secondary school where I worked, my students were 99% Africa American, predominantly from lower socio-economic backgrounds. Many of my students, due to successive school failure and poor parental involvement, greatly mistrusted and disliked school and anything concerning school. These were the disenfranchised children, children who had failed miserably within the "regular" classroom setting and with traditional instructional methods. My initial goals were to engage and motivate the students to learn. That was much more difficult than I ever could have imagined.

My first encounter with the Learning Strategies Curriculum came during my graduate program studies at The George Washington University. At GWU, graduate students in Learning Disabilities are required to take a course in the Learning Strategies model. To say that I was greatly unimpressed with the "practicalities" and "workability" of the model would be an understatement. Although I had been impressed with a group of students with learning disabilities who paid a visit to my graduate class one evening with the proof that the strategies worked, I was still extremely skeptical. My misgivings were mainly in the areas of personal motivation (Did I truly wish to utilize the strategies?) and bravery (Could I really implement the strategies effectively?). The students who visited my graduate class and presented their proof seemed to be more or less from solid middle-class backgrounds and well motivated to improve their lot in school. How could this then work with my often unruly group of students with marginal reading, writing, and math skills?

My choice to implement a strategy was, however, not left up to me. Due to the fact that my school at that time had accepted the strategies model within the basic school curriculum, I was forced to teach the Test Taking Strategy (PIRATES) as part of my teaching responsibilities for that year. I was terrified.

With gentle encouragement and reassurances from my team-teaching members who had previously implemented a strategy, I was able to put together the paperwork and folders needed for my classes. After many nervous evenings practicing my "dialogue" in front of my mirror, I began.

The beginning was quite rough. Instead of simply laying out the manual and following the scripted dialogue, I attempted to memorize the information, which proved to be impossible. As I later accepted, using the manual is much simper for me and for my students. I felt incredibly clumsy using my overhead projector as I felt the need to warn students each time I needed to change the transparency. I vividly remember the end of a day when I did not feel I could face another day of all the paperwork and reading from a prepared script. My attitude and motivation changed as I saw my students change.

My students, the students who seemingly could not recall the capitol of the United States of America from one day to the next, were recalling vital bits of information. Even if they did use their cue cards as part of the recall process, they were remembering and finding validation for the previously learned information. Even after a day or two of presenting the strategy and briefly reviewing the mnemonic (PIRATES), my students could see a basic rhyme and reason to the class activities. In the days to follow, the students remained invested and were able to learn and rehearse the basic format of the strategy.

Throughout the Describe, Model and middle parts of the Controlled Practice stages, my students remained motivated and focused. During difficult times (school break or lowered productivity), re-focusing and reiteration of personal goals have helped students to get back on target. I thought that the eventual split of practice testing students, feedback to students, and students with empty strategy time would cause a major problem with classroom management. Three out of the four classes that I did the strategy with "governed" themselves. They made a group consensus that this was something important to them and agreed that an orderly classroom was the only way to go. I provided the daily newspaper and word search puzzles for them, and students not engaged in actual strategy work did those activities or homework. I was amazed.

Another strange event began to happen later during the strategy instruction. Although generalization is a vital stage of the strategies curriculum, I believed that this would be a very difficult step for my students. During the advanced practice stage of the strategy, several of my team teachers began to show me quizzes and tests that the strategies students had recently completed. On the top of many of the tests was the PIRATES device and evidence throughout many of the tests that showed that some of the students were actually trying to use the strategy outside of my class.

From a management point of view, the early stages of work necessary for the strategies is crippling. It took me forty-five minutes to correct my first practice test! At that rate, I initially believed, I would be correcting paperwork each night until three a.m. As I became more comfortable, confident and organized, I found that the paperwork was not that difficult to keep up with. During the end of that ten week advisory period, I could actually correct a practice test within five minutes.

Reflecting upon of my first attempt to implement a learning strategy, my overall impression is that the curriculum works. Children, even a bunch as unruly, unmotivated, and school-fearful as mine, can and do become quickly invested and stay motivated and invested throughout the instruction. A very important consideration is the fact that the Strategies Curriculum has been adopted and used by the school in which I taught. This eased first time implementation since I did not have to teach a predetermined curriculum as well as the strategy. My school administrator believed that the learning strategies model had potential and organized our teaching schedules to meet the needs of our students. Along with this vital support, I also had the daily encouragement and support of my team members, some of whom had previously taught a strategy and some who had not. What counted was the cohesive mind-set and teamwork that existed among us. "Use your strategies" was heard throughout the school day, and our students were encouraged by all of their teachers to implement what they had learned.

My students succeeded and, most importantly, saw their success unfold in front of their eyes. I learned a new skill and found that, with some personal fine-tuning and more effective time management, it worked. I think that's what education is all about.

*The CRL would like to thank Mary Vance for her contributions related to "Guiding Case Discussions" and Juliana Taymans for sharing the cases from teachers.

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PAIRED ASSOCIATES MANUAL

The Paired Associates manual by Janis Bulgren & Jean Schumaker is now available for purchase from the KU-CRL for $15.00 plus the fee for shipping and handling. The Paired Associates Strategy is a strategy designed to enable students to master information in their content courses. Specifically, this strategy enables students to learn pairs of items that are related (e. g., George Washington was the first U. S. President, Topeka is the capitol of Kansas, World War II began in 1941).

ACTIVE/INACTIVE STATUS FOR TRAINERS

Due to varying circumstances of the approximately 900 persons who have become SIM trainers over the years, an active status and an inactive status for trainers have been established. In order to be an active member of the SIM Trainers Network, two criteria need to be met. These criteria are: 1) to attend an update training session at least once every two years and 2) to be a current subscriber to Strateworks.

Recently a letter was sent to each of the preservice and certified inservice trainers who have not been to an update training session in the last two years and/or who are not current subscribers to STRATEWORKS. In this letter, we asked each person to let us know as to whether he/she prefers to be an active or inactive member of the SIM Network. Those who choose the active status will be eligible to order materials from CRL and EDGE.

Any person who wishes to be an active member but has valid reasons for not being able to meet either of the two criteria should put the information in writing on the form provided with the letter and return the form to KU-CRL.

We hope that each person receiving the letter will realize that there are numbers of people on our training lists who are no longer interested in SIM training or who have not kept current with what has developed within the last ten years. We need to know if a person is no longer training so we do not give his or her name to prospective trainees. Also we hope to conserve on excess mailings that may not be used. If a person chooses to be inactive at this time and later wishes to become an active member, that person will be able to do so by meeting the criteria.

NORTH CENTRAL REGIONAL SIM TRAINERS MEET

By the end of the two day conference, the thirty-plus SIM trainers and teachers who met at the beautiful four-star Sofitel Hotel in Minneapolis, MN, on January 26 and 27 had made connections with each other that firmly established the feeling of "regionality". Even though the weather was extremely cold, participants took home new knowledge, fresh ideas, and feelings of great warmth from a superbly planned and executed conference. Under the outstanding leadership provided by Shari Schindele, the regional planning committee composed of Janet Jones, Carl Skordahl, Sharon Saunders, Deb Sylvara Shepley, Michael Brown, and Sandy Van Pelt went far beyond the expectations of the participants. Participant evaluations even made references to the "Magnificent Seven". In addition to the sessions on newer and older strategies, highlights of the conference for many included the presentation by Larry Bemish on "Some Considerations in the Use of Humor". In her final evaluation, Linda Hartman praised the overall effectiveness of the conference and added, "This was the stress reliever I needed now."

MICHAEL PRESSLEY AT NATIONAL SIM CONFERENCE

The keynote speaker at the National SIM Conference in June will be Michael Pressley from State University of New York at Albany. Michael Pressley is one of the most prolific authors and researchers in the area of learning strategies. He has been one of the chief consultants to the KU-CRL regarding its strategies research for the past 8 years. He just received the Albert J. Harris Award from the International Reading Association for an article that he wrote on reading failure in at-risk students. Plan now to attend the conference on Thursday, June 27, to hear Dr. Pressley speak. You are in for a treat!

CONGRATULATIONS TO JEAN SCHUMAKER

At the recent CEC Annual Convention held in Orlando, FL, Jean Schumaker was awarded the DLD Individual Award for Outstanding Contribution to the Field of Learning Disabilities. Jean was recognized for her research on instructional innovations and her commitment to translate her research into teacher-friendly materials. The lives of tens of thousands of teachers and students with learning disabilities throughout the world have been touched as a result of her contributions. The staff at KU-CRL is very pleased that Jean has received this well-deserved recognition.

REGISTRATION FORM

NATIONAL SIM TRAINERS MEETING
June 27, 28, & 29, 1996
Lawrence, Kansas
Eldridge Hotel (913-749-5011 for reservations)

Name: ______________________ Work Phone: ______________________

Work Address: ______________________

____

Home Address: ______________________ Home Phone: ______________________

____

Social Security Number (required): ______________________

Please send any future mail to my _____ home _____ work address

Registration Fee all 3 days - $90.00	Registration Fee 2 days - $70.00	Registration Fee 1 day - $45.00
Thursday June 27 ☐	Thursday June 27 ☐	Thursday June 27 ☐
Friday June 28 ☐	Friday June 28 ☐	Friday June 28 ☐
Saturday June 29 ☐	Saturday June 29 ☐	Saturday June 29 ☐
	Please check days you plan to attend	Please check day you plan to attend
Total Amount Enclosed: $	Total Amount Enclosed: $	Total Amount Enclosed: $

Please note: Add a $10.00 late fee for registration after May 15, 1996

Make check payable to KU-CRL.

Your receipt for registration will be available at the Trainers' Meeting

Mail to: Janet B. Roth
The University of Kansas
Center for Research on Learning
3061 Dole Center
Lawrence, KS 66045

1996 CALENDAR OF EVENTS

June 27, 28, & 29, 1996, Lawrence, KS, *National SIM Conference*
July 16-20, 1996, Initial Training Workshop University of Kansas
July 16-20, 1996, Advanced Training Workshop University of Kansas
July 29 - August 2, 1996, Potential SIM Trainers' Workshop University of Kansas

***Reminder- -**

Each trainer is asked to attend a Regional, State, or National Trainers' Update Meeting every two years. At this time there are opportunities to attend the June National SIM Conference.

Note: Due to the increase in shipping rates, our minimum shipping charge will now be $4.00 rather than $3.00.

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