Using Case Studies

Why use case studies?
Case studies allow trainees to carefully analyze a situation and make well considered decisions about how to apply the technical information they have learned. Analyzing case studies gives trainees the opportunity to apply new knowledge and skills in situations similar to those they will face in their workplace, which helps ensure that the knowledge and skills are transferred to the job.

In addition, case studies facilitate transfer of knowledge and skills by allowing trainees to:

- Employ different techniques for accomplishing both familiar and unfamiliar tasks
- Approach problem-solving using new strategies
- Become comfortable following new practice recommendations by collaborating with other professionals who may have similar reservations (or enthusiasm) for change
- Practice in a safe environment
- Receive targeted feedback and support, which is the key to achieving that a high level of proficiency and attaining workplace performance expectations

Preparing for the activity

1. **Read the case studies.** Carefully review the details of the cases and study the answers to the sets of questions that the trainees will be discussing. Choose situations that suit the objectives of the training and match the needs of the trainees.
2. **Adapt the activity to make it relevant**. Adapt the cases so that they reflect the cultural practices, conditions, and circumstances that trainees will encounter at their work sites.
3. **Anticipate and know how to address issues**. Review the technical information in *Family Planning: A Global Handbook for Providers* (CCP and WHO, 2011) related to the issues addressed in the case study so that you are prepared to address questions that trainees might raise.
4. **Familiarize yourself with the related tools and job aids.** Which tools are the trainees expected to use when solving the case? Make sure that you are familiar with the material and be prepared to describe proper use of the tool or job aid—whether it is a screening checklist for medical eligibility, a client brochure that describes the characteristics of a particular method, or pages from the counseling tool.
5. **Decide how you will introduce and use the case study.** If this is the first time that trainees are working through a case study, you should conduct at least part of the activity with the entire group. As trainees become more familiar with the expectations, divide them into smaller groups or pairs so that each trainee has more responsibility for resolving the case. If you have several small groups, you may want to assign each group to a different set of questions. Ensure that each small group reports back to the larger group so that all trainees can reflect on and benefit from the lessons learned in other groups. Alternatively, you can assign the case studies as “homework” that trainees can work on—either individually or in groups—outside of the classroom.

6. **Practice giving instructions to the trainees**. Make sure you can provide clear, simple guidelines so that the activity is easy to understand.
7. **Prepare copies of resources.** Make sure that you have copies of the necessary resources available for the trainees. Ensure that trainees have copies of the tools or job aid(s).

Conducting the activity

1. **Introduce the activity**. Emphasize that case studies provide trainees with an opportunity to analyze a case and to make well-considered decisions about how to apply the technical information they have learned to situations similar to those they will encounter in the workplace. Provide step-by-step instructions that clearly describe how you (the facilitator) and the trainees are expected to analyze the case study. Tell the group how much time they have to complete each portion of the activity.
2. **Encourage trainees to work as a team and take advantage of all the available resources when answering the questions**. Groups should consider each question in the set one at a time and use their job aids, counseling tools, fact sheets, study notes, and PowerPoint slides from the presentation to arrive at the most complete response. Each group should select a spokesperson who will report their answers to the larger group.
3. **Describe the case.** Review the handout of the case studies. Ask one trainee to read the client description aloud. Ask trainees if they have any questions.
4. **Provide support and feedback as trainees work through the sets of questions.** Each small group should answer their assigned questions independently. Move from group to group, and listen to the suggestions the trainees are making, offer encouragement, suggest strategies, and redirect trainees who are moving towards or have given an incorrect response. If multiple facilitators are available, assign one facilitator to each small group.
5. **Ask spokespersons to report back.** After the groups complete their analysis and questions, ask the spokesperson from each group to share their answers with the entire group so that all the trainees have an opportunity to learn the correct answers to each set of questions. As each group reports, encourage other trainees to comment and offer additional feedback.
6. **Use the answer key to guide the discussion.** Each case study has an answer key that can help you process the reports, comments, and feedback. As necessary, intervene if neither the spokesperson nor the trainees can suggest the correct response. It is imperative that trainees know whether their answers to the case questions are correct.