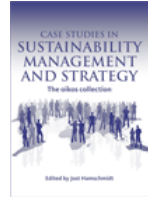




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# 1.3

## Teaching Notes

### Combining Contents with Concepts

Excellent cases are always linked to learning objectives, which include concepts, theories and methodologies. However, the underlying conceptual ideas are sometimes not wholly explicit in the case; therefore, teaching notes provide the means for an educator to explore the full learning potential of a case in class. Within the oikos Competition we have observed a surprisingly widespread lack of knowledge concerning concepts, goals and contents of case teaching notes. In this section we therefore provide a brief description of what useful teaching notes should look like.<sup>1</sup>

Teaching notes should provide useful background information in order to better understand a case. According to the European Case Clearing House,<sup>2</sup> which holds the world's biggest case collection, only about 50% of their registered cases are accompanied by teaching notes. However, 80% of the 50 most popular cases do provide teaching notes. This leads us to the assumption that teaching notes confer important benefits to case instructors.

All of the cases included in this book have excellent teaching notes, which are available for faculty, free of charge, by request from Greenleaf Publishing at the following link:

**[http://www.greenleaf-publishing.com/oikos\\_notes](http://www.greenleaf-publishing.com/oikos_notes)**

Basically, teaching notes are guidance documents which enable potential case instructors to teach a case, providing a case summary, teaching goals, key issues, con-

- 1 See also Lapierre/Cardinal (2003): *Guidelines for Writing Teaching Notes*. HEC Montreal. Online resource available at: [http://www.hec.ca/en/casecentre/case/guide\\_redaction\\_np\\_a.pdf](http://www.hec.ca/en/casecentre/case/guide_redaction_np_a.pdf).
- 2 See <http://www.ecch.com/about/writing-teaching-notes.cfm>; see also the information in Chapter 6.3.

cepts, open questions and potential approaches to the case. While the style, length and design of a teaching note may vary widely, we consider here the following elements:<sup>3</sup>

- **Case summary.** The case summary is a short version of the case and highlights the major points. What is the context and storyline? Who are the main players? What is issue framed by the case? The aim is to provide the case instructor with the key elements of the story as concisely as possible.
- **Case teaching objectives, target audience, targeted courses.** A teaching note explicitly clarifies the teaching objectives (e.g. concerning content and theoretical concepts), target audiences (e.g. undergraduates, MBA or executive MBA students). It should also mention the courses in which the case can be applied. Is the case suitable for a mainstream marketing, strategy or management course or should it be taught in an environmental management or CSR course? What knowledge base is needed in order to successfully deal with the case?
- **Sources of the case material.** The case author should explain how the case was developed, including the steps involved in information gathering and data collection (e.g. interviews with company representatives and/or stakeholders, annual reports, media reports, Internet searches, press coverage, internal documents, scientific articles, etc.).
- **Teaching approach and didactic elements.** The teaching note should enable the transfer of knowledge. Cases are question-oriented and the teaching note should systematically help the instructor to raise relevant questions in order to promote a learning experience. It should also provide possible answers to questions that are likely to arise during in-class discussion. Questions can be developed to prepare students for in-class discussion, in order to open or to advance the discussion. It might be helpful to develop an ideal structure for this, where each issue is allocated a certain amount of time. These guidelines serve as a starting point for the instructor and will have to be adapted to suit particular circumstances. Other didactic elements can be the introduction of additional information during the course, the use of the blackboard, online research during class, suggestions for group work, role-plays, or student assignments in order to consolidate the learning process.
- **Analysis and methods.** Of course, the questions posed in a case require answers. Therefore, the teaching note should include the necessary links to concepts and theories and provide comprehensive response options to the questions. The frameworks provided should also help the students to develop their personal synthesis and should encourage further reflection. It should be noted that an excellent case will have multiple “solutions” to business challenges. Teaching notes should therefore reflect possible trade-offs among competing alternatives (e.g. how to evaluate a short-term cost reduction against a long-term reputational risk). The identification of trade-offs and the

3 The proposed elements include the standard elements of ECCH requirements for a teaching note; see <http://www.ecch.com/uploads/teachingnote.pdf>.

understanding of the logic of these trade-offs will improve the students' strategic perspective on business challenges in a sustainability context.

- **Further reading, references, media support.** A further reading and reference list, useful in mastering the concepts and theories addressed by the case, should be provided. Suggestions for reading assignments for students are helpful; and references to relevant websites and other sources of information are becoming increasingly important. The use of additional multimedia support, if available, should be briefly outlined.
- **Feedback and perspectives.** Teaching notes should also communicate any tips or hints the author has gained from their personal teaching experience with the case. What has worked well and what has not and for what reasons? If there is information available on the real outcome of a case, it should be included in the teaching notes. Also helpful are suggestions for other possible avenues of exploration, which could provide the basis for a more detailed study or some form of knowledge transfer in other contexts.

These are some basic suggestions for constructing teaching notes. We also acknowledge that there are a variety of other valid approaches. In essence, however, the user of teaching notes will be well served if they are: brief (a maximum of ten pages), well structured and comprehensive.