

I. Proposed Title

Case-centered Teaching and Learning in Evaluation

II. Volume Editor(s)

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III. Brief Overview

Evaluation, as a practice-oriented discipline, is taught in higher education and professional development organizations around the world. Typically, professors, researchers and instructors with experience in designing and conducting evaluations develop theoretical and practical courses for learners. Case-centered teaching and learning supports the development of the knowledge, skills and competencies required for the professional practice of evaluation in varied and complex settings. Evaluators-in-training need to develop skills related to reading people and situations, exercising influence, negotiating and compromising; such skills can best be acquired through interactive methods such as case-centered teaching and learning (Brock & Alford, 2015; Gatti Schafer, 2016). Adapting definitions from Peters, Cellucci, and Ford (2015), the Yale Center for Teaching and Learning (2019), and the Stanford University Center for Teaching and Learning (1994), a case for teaching and learning is a series of real events, or events that could reasonably take place, which tell a story about an evaluation, its context, and/or an issue with an evaluation. However, little is currently known in our field on how to best develop and use cases from an instructional perspective.

The purpose of this volume, therefore, is to further our understanding of how case-centered teaching and learning can support the development of evaluation knowledge and skills. To do so, we plan to organize the volume into two sections: the first section will include an overview of case-centered teaching and learning, through reviews of the literature and exploratory empirical research. These chapters will describe teaching cases and provide an overview of the literature related to case-centered teaching and learning, in evaluation and other disciplines; the use of case-centered teaching and learning to support the development of evaluation competencies will also be presented. The second section of the volume will provide more practical guidance by focusing on how to develop and use cases to teach and learn evaluation. These chapters will also critically examine existing cases of evaluation practice in relation to the purposes of teaching and learning, as well as professional competencies. Finally, the volume will end with a call to action focused on both continued scholarship and practice in this area by highlighting specific gaps in our current knowledge and identifying potential practice innovations for the future.

IV. Justification

Scope

Evaluators require a vast array of skills, abilities, knowledge and experience in order to make appropriate decisions about how best to design evaluation studies, how to manage them as they unfold, and how to make judgements about the quality and value of the evaluands. The multifaceted skills needed are articulated in various sets of evaluation competencies, published by different evaluation associations. Although some of the more detailed aspects of these competency sets may vary between associations, most include similar foundational elements that are necessary to evaluation practice, such as technical and interpersonal competencies. Case-centered teaching and learning can significantly contribute to the development of evaluation competencies by providing a low-risk environment in which learners can engage with their instructor and each other about real-life scenarios that present them with organizational, intervention and contextual challenges. The interactive engagement demanded by case-centered teaching moves beyond the traditional “show and tell” teaching methods to simulating a situation from which experience can be gathered to prepare learners more comprehensively for the complex reality of evaluation practice (Patton & Patrizi, 2005). In other words, case-centered teaching and learning supports the development of five skills that are crucial to evaluation. These include: a) critical analysis (Menzel, 2009; Patton & Patrizi, 2005); b) evaluative judgment (Brock & Alford, 2015); c) consideration of ethics of practice (Borry, 2015; Culpin & Scott, 2011; Combes et al., 2015; Diamantes & Ovington, 2003; Gatti Schafer, 2016; Heitzman, 2008; Menzel, 2009); d) problem-solving (Austin & Packard, 2009; Menzel, 2009; Patton & Patrizi, 2005); and e) negotiation and communication skills (Austin & Packard, 2009; Gatti Schafer, 2016; Mallinson, 2018; Patton & Patrizi, 2005).

In addition to the development of these skills, case-centered teaching and learning enables emerging evaluators to develop professional experience from which they can draw upon in the future. The cases themselves, therefore, can serve as a foundation for new professionals, in the absence of real-life experience (Jonassen & Hernandez-Serrano, 2002). A 2005 issue of *New Directions for Evaluation* tackled case teaching in evaluation. Two of the six chapters focus on teaching and learning with cases. The first chapter briefly reviews the history of case method teaching in other professions and explores its applicability for evaluation education, and the final chapter presents ideas for teaching use based on the evaluation cases included in other chapters of the volume. According to the authors, even though case narratives are often present in the evaluation literature, there continues to be a lack of high-quality, readily available teaching cases in the field (Patton & Patrizi, 2005). Moreover, there is little guidance for evaluation educators interested in developing their ability to teach and learn with cases. To date, only Patton (2005), King and Stevahn (2012), and Preskill and Russ-Eft (2016) offer guidance, and it is limited and not likely to be useful for inexperienced case facilitators. In other words, even though the 2005 NDE issue is an important contribution, the fact that it is the only published set of papers on case-centered instruction in evaluation is troubling for a few reasons. One, the fact that this is essentially the only scholarship available in evaluation is worrisome in and of itself. Clearly, this is an ignored area in our extant literature. Two, while both the introductory and closing chapter are helpful starting points for beginning the conversation on using cases in evaluator and evaluation education, they are brief in both their breadth and depth as a function of page limits

imposed by the journal. To date, we lack a coherent analysis of how we teach and learn evaluation competencies with cases. Moreover, there is a substantial body of literature in other applied professions, such as education, medicine, and business on case method teaching that is applicable to evaluation. Yet, here too, the extent to which these ideas and concepts can be transferred to the field of evaluation remains unclear and unexplored.

The proposed volume seeks to explore the theoretical and practical aspects of case-centered teaching and learning in evaluation, in order to provide readers with a strong foundation on which they can develop their own instructional practice and their ability to learn from cases. More specifically, the volume will focus on the instructional design theories and principles that support case-centred teaching and learning, and will establish linkages between these elements and the substantive knowledge and skills required by evaluators in their professional practice. The volume will therefore primarily be of interest to evaluation educators who teach evaluation courses in academia or professional development programs, in person, on line, or through other mechanisms. The multiplication of educational opportunities observed in recent years, in universities and through professional associations, has resulted in many evaluators taking on the role of educators. The volume will support them as they develop their own teaching skills and seek new ideas to support learners. It may also be of interest to evaluators who have developed “professional stories” over time, based on their experience, and who wish to share these stories with emerging evaluators by crafting teaching and learning cases. Finally, evaluation learners may be interested in how cases can support their ongoing development efforts; this volume will provide them with guidance on using cases to learn and develop evaluation competencies.

Novelty and Timeliness

This volume represents a novel extension of previous work, and has the potential to make a significant contribution to evaluation teaching and learning by providing an in-depth examination of how case-centered teaching and learning supports the development of evaluation competencies, and how best to develop and use cases in various evaluation-related instructional settings. Indeed, rich cases that capture experience for reflection have largely eluded professional training in evaluation. Alkin, Daillak, and White (1979) were early pioneers in presenting educational evaluation cases, but their primary purpose was cross-case analysis to generate theory on evaluation utilization rather than constructing and using cases for teaching. Other early sources offer particular insights into the evaluation craft: the Council on Foundations’ *Evaluation for Foundations: Concepts, Cases, Guidelines, and Resources* (1993), the use of illustrative cases in the Joint Committee on Standards for Educational Evaluation’s *Program Evaluation Standards* (1994), and “The Ethical Challenges” section in past issues of the *American Journal of Evaluation*. Alkin’s *Evaluation Roots* (2004) makes evaluation theorists and their development the subject of cases, but these cases are written by the theorists themselves and do not include a specific teaching component. Our proposed volume will advance theory and practice by providing theoretical and literature-based overviews of case-centered teaching and learning, as well as empirical and practical papers focused on how case instruction and learning can support the development of essential evaluation knowledge, skills and competencies and how to best develop and use cases in the specific context of evaluation education.

In addition to the timeliness and novelty of our proposed volume, the way in which it will be developed also represents an innovative approach to conducting research on evaluation (RoE) and may serve as a model to other international research groups. Our volume will be developed by the CASE Collaborative, a group of evaluators engaged in teaching evaluation through university courses and professional development workshops. Members in the group represent a variety of substantive areas (e.g., education, international development, public health, psychology) and national contexts, including South Africa, Canada, United States, New Zealand and Pacific Islands. The CASE Collaborative formed after initial on-line sessions sponsored by the International Society of Evaluator Education (ISEE) in 2018. The impetus for the formation of ISEE, now a Voluntary Organizations for Professional Evaluation (VOPE), was spurred by the work of Gullikson, LaVelle, King and Clinton (2017). Gullikson and colleagues provided an initial assessment of the state of evaluator education and a call for further research on this topic. The development, and use of, cases represents one of these calls to actions. The breadth of experience among this group positions us to produce a volume that is applicable across a variety of evaluation contexts.

Quality

Case-centered teaching and learning is a critical approach for teaching a professional practice, as evidenced in other fields such as law, business and medicine. Given the growth in evaluation and the focus on developing competencies in a variety of domains, it is essential for the field to align training and education with appropriate practices for teaching and learning. Quality training and education directly supports quality evaluation practice. This volume will provide the field with innovative and empirically-derived guidance in developing cases to support teaching and learning, and utilizing cases to support professional growth. As conversations about the professionalization of evaluation continue to be held around the world, and as VOPEs investigate the possibility of implementing professional certification or accreditation systems, the issue of evaluator education is likely to increase in importance. Therefore, it is essential to conduct research on evaluation (RoE) that will directly inform VOPE policies and evaluation education practices. Our proposed volume is an essential step in supporting case-centered instruction in evaluation undergraduate and graduate university programs as well as in professional development training and workshops.

The CASE Collective is in a position to develop a high-quality volume, as evidenced by its previously cited breadth and scope and by the publication experience held by its members. Members of the group have published extensively in *New Directions for Evaluation* (including previous experience as co-editors of a volume), the *American Journal of Evaluation*, the *Canadian Journal of Program Evaluation*, and *Evaluation and Program Planning*, to name a few. This collective experience will enable group members to produce quality papers in a timely fashion, and the editorial process will ensure internal reviews within the group and a critical stance towards our final product.

Audience

We envision several audiences within the field of evaluation benefiting from this volume. First, case-centered teaching is a critical issue in supporting the professionalization of the field, which

is likely a shared interest that cuts across a range of evaluators. Second, faculty members, lecturers, and professional development providers on evaluation-related content will benefit from an understanding of case-centered teaching for evaluation. Case-centered teaching is appropriate for workshops and courses related to evaluation theory, evaluation practice, and evaluation methodologies. It is also appropriate across various instructional platforms, such as the classroom, online, and hybrid approaches. Finally, practicing evaluators may use cases to engage in reflective practice and improve their evaluation practice. We hope practitioners also gain an understanding of how to assist the field in developing quality cases that are rooted in their practice.

Level of Presentation

Because the readers of this volume will be evaluation scholars and professionals, they will have the requisite knowledge and experience to engage with the issues in the volume. First, they are aware of the important issues facing our field, such as the development of evaluation competencies and their link to the professionalization of the field. Second, they will have experience with some level of education and training in evaluation, such as workshops or university degree programs. Third, they will have some knowledge and experience with practicing evaluation. We do not anticipate any material will be difficult to understand among a wide evaluation audience.

V. Outline of the Volume

Editor's Notes.

Leanne Kallemeyn, Isabelle Bourgeois, David Ensminger

Chapter 1. What is the Case for Teaching with Cases in Evaluation? (3000 words)

Ken Linfield, Tiffany Smith

Chapter 2. How Do We Teach and Learn with Cases? (6000 words)

Bianca Montrosse-Moorhead, David Ensminger, and Christine Roseveare

Chapter 3. How Does Teaching with Cases Support the Development of Evaluation Competencies? (6000 words)

Isabelle Bourgeois, Lauren Wildschut, and Marla Steinberg

Chapter 4. What are the Characteristics of Cases We Use to Teach and Learn Evaluation? (6000 words)

Leanne Kallemeyn, Kim Castelin, Eleanor Titiml

Chapter 5. How Do We Share Our Stories as Good Cases for Instruction? (6000 words)

David Ensminger, Bianca Montrosse-Moorhead, Ken Linfield

Chapter 6. What Does the Use of Cases Look Like in Practice? (6000 words)

Leanne Kallemeyn, Christine Roseveare, Marla Steinberg, Tiffany Smith

Chapter 7. What's Next for Cases in Teaching and Learning Evaluation? A Call to Action (3000 words)

Jennifer C. Greene, Tiffany Smith

Total Estimated Word Count: 36 000

Abstract

Evaluation, as a practice-oriented discipline, is taught in higher education and professional development organizations around the world. Typically, professors, researchers and instructors with experience in designing and conducting evaluations develop theoretical and practical courses for learners. Case-centered teaching and learning supports the development of the knowledge, skills and competencies required for the professional practice of evaluation in varied and complex settings, by exposing learners to real events, or events that could reasonably take place, which tell a story about an evaluation, its context, and/or an issue with an evaluation. Case-centered instruction supports the development of various essential evaluation skills, such as reading people and situations, exercising influence, negotiating, and compromising. However, little is currently known on how to best develop and use cases from an instructional perspective. The purpose of this volume, therefore, is to further our understanding of how case-centered teaching and learning can support the development of evaluation knowledge and skills. To do so, the volume focuses on both theory and practice, by describing teaching cases and providing an overview of the literature related to case-centered teaching and learning, as well as demonstrating some of the links that exist between case-centered instruction and evaluation competencies. The volume also provides practical guidance on how to develop and use cases to teach and learn evaluation as well as concrete examples of cases and how they are implemented in the classroom. Finally, the volume ends with a call to action focused on both continued scholarship and practice.

Editors' Notes

This brief section will introduce the volume and the CASE Collective to provide some grounding for the chapters. More specifically, the evaluation teaching and learning cycle will be described, and the focus and use of the term “competencies” will be explained. Other key elements found throughout the chapters, such as reflective practice, will also be described within the context of this volume.

Chapter 1. What is the Case for Teaching with Cases in Evaluation?

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Introduction and Purpose: The purpose of this chapter is to set the stage for the remainder of the volume. Specifically, this chapter will frame the case for teaching with cases in evaluation. Why is the use of cases integral in the teaching and training of future evaluators, and how ought we to use cases in our teaching practice? First, we will provide a brief history of how we began the journey toward better understanding the use of cases in teaching and learning in evaluation. Then, we will note important themes in the use of cases to teach evaluation. These brief introductions will foreshadow the more detailed developments in later chapters. Next, we will present our working definition of a case, grounding it in the range of approaches in the broad field of case-based teaching and learning. Finally, we end the chapter with a focus on the role of reflective practice in this volume.

How We Got Here: The current CASE Collaborative began in December 2018 following some virtual presentations regarding the use of cases in evaluation education as a part of the International Society for Evaluator Education. Along with monthly virtual conversations about a range of elements, the group made progress developing a system for coding cases that can be used in instruction as well as on a number of presentations and publications.

Themes in the Use of Cases: One of the common values that cases provide for instruction is helping students learn to think like an evaluator. Cases provide a rich set of specifics not only

about what evaluators do but also who evaluators are and *how good evaluators think*. As such, cases may function as a signature pedagogy, a central and vital component of evaluator education. One particular challenge that faces evaluation education is that evaluators function in a broad range of fields, from education to public health and many other disciplines. With such different settings, general evaluation concepts can seem disconnected from the details of the particular program. Cases provide the specifics of given settings even as students learn concrete points that are connected to general concepts. The later chapters in this volume will provide specifics that are context dependent but also attuned to the general principles and competencies of evaluators.

A Working Definition of “Case”: Although there is clear agreement among many for the value of cases, there is less agreement on what makes a case. Although Peters, Cellucci, and Ford (2015) suggest that cases must present real events, others hold that fictionalized accounts may either be an acceptable alternative (e.g. Stanford University, 2014) or even preferable (Wohlfarth & Morgan, 2017). We will address several other elements that likewise can take two or even more forms in cases that have value for education. We thus argue for a broad rather than narrow definition of “a case”.

Reflective Practice and This Volume: This volume has been written as a result of a constant, dynamic, and iterative process of reflection with the Case Collaborative team. The end of this chapter serves as an invitation for the reader to join the Case Collaborative team in the reflective process (Smith & Skolits, under review), and to think about how they can incorporate case teaching and learning in their own practice as they digest the text. This section will close with a preview of chapter seven, which provides a call to action regarding what’s next for cases in teaching and learning evaluation.

Chapter 2. How Do We Teach and Learn with Cases?

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In applied fields where preparation for professional practice is fundamental to training and education efforts (e.g., business, law, medicine), cases play a central role. Preparation for

professional practice is also fundamental to evaluation, and yet, we have very little scholarship on the use of cases from an instructional perspective. In this paper, we aim to illuminate how evaluation educators, including those in institutions of higher education and those providing ongoing professional development opportunities, teach and learn with cases.

Aligned with this purpose, in the first section of the chapter, we review extant literature on the learning philosophies and concepts that ground case-centered teaching and learning across academic disciplines. We start by briefly describing the sociocultural view of professional practice that is central to case-centered teaching and learning across several professions. A sociocultural framework defines practice by what practitioners do, who they are, how they think, and the environment they work in (Chaiklin & Lave, 1996; Dewey, 1965; Shulman, 2005). We then go on to review important and relevant theories and concepts that are visible across applied professions where cases serve as key educative texts. These include:

- *Signature pedagogies*: Methods of teaching that define what the profession considers as the core knowledge, skills, and dispositions that constitutes expertise (Shulman, 2005). This NDE proposal and chapter argue that teaching and learning with cases should form part of evaluation's signature pedagogy.
- *Core concepts*: General ideas or understandings that are central to a profession (e.g., the difference between formative and summative evaluation). Cases can be a useful instructional method of introducing and helping students learn these concepts.
- *Threshold concepts*: Portals or gateways to previously unknown ways of thinking...[and these] new understanding[s] may be at the level of the way of thinking about or generating knowledge in a discipline (epistemological) and/or with respect to one's own being and identity (ontological)" (Barradell, & Kennedy-Jones, 2015; Meyer & Land, 2003, 2005). Cases can be a powerful teaching strategy for exploring these concepts.
- *Reflection-in-action*: Ongoing experimentation and reflection for the purpose of assisting the learner in developing a reservoir of practical and theoretical knowledge that they can draw upon in the future (Schön, 1983). Cases can help learners develop this reservoir, which is especially important for novice evaluators who have little or limited evaluation experiences from which to draw.
- *Cognitive apprenticeship*: Aims to teach the thinking processes experts use to handle complex practice with a focus on making this thinking visible to novices, so that they can observe, enact, and practice these processes (Collins, 2006). Cases can help learners learn to "think" like an evaluator.
- *Constructivist understanding of learning*: Frames learning as socially constructed meaning that people construct understanding both individually and through discussions/interactions with others (Piaget, 1959, 1985, Vygotsky, 1978). These understandings of how learning occurs can help inform educators about how to use cases.
- *Decomposition of professional practice*: Entails organizing practitioner learning around essential elements of practice and focuses attention on the ways in which educators segment practice into parts for purposes aligned with instructional goals (Grossman, Compton, Igra, Ronfeldt, Shahan, & Williamson, 2009). These understandings of how learning occurs can help inform educators about how to structure learning with cases.

The second section of the chapter addresses more practical considerations of employing cases as pedagogical tools. This discussion necessarily focuses on:

- *Instructional design*: Using backward design principles to determine the both cognitive and affective outcomes that the instruction will be designed to achieve. (Anderson, & Krathwohl, 2000; Krathwohl, 2002; McTighe, & Wiggins, 2004).
- *Use of case types to meet objectives*: Selecting cases that can support stated learning objectives and outcomes based on cases taxonomies (e.g., case vignettes, case exemplars, well-structured problem cases, simulation cases, and open end problem cases) (Jonassen, 2006).
- *Context and learner analysis*: Considering aspects of a case that would improve learner engagement and motivation, such as authenticity of case, contextually, culturally and professionally relevant to learners, and developmentally-appropriate for learners (Ladson-Billings, 1995; Keller, 1987).
- *Questioning*: Using questions to facilitate discussion, dialogue, reflection, and clarification, that will support students' acquisition of the learning objectives and deepen understanding from cases (Ertmer, & Koehler, 2014; Rosenshine, 2012).
- *Constructing case learning environments*: Cultivating the type of learning environment case-centered teaching and learning demands (Ellet, 2007), including setting the learning and instructional process of using ill-defined problem cases (Jonassen, 1997).

Our overarching aim is to better articulate how evaluation educators both in and outside the academy teach and learn with cases and to provide practical guidance for instructional design. Moreover, consistent with calls for more research on evaluator and evaluation education (Gullickson, King, LaVelle, & Clinton, 2019), we hope to inspire a new generation of research on case-centered teaching and learning in evaluation by offering theoretical frameworks and concepts that might undergird such studies.

Chapter 3. How Does Case-Centered Teaching Support the Development of Evaluation Competencies?

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Evaluators require a vast array of skills, knowledge and experience in order to make appropriate decisions about how best to design evaluation studies, how to manage them as they unfold, and how to make judgments about the quality and value of interventions. The skills, knowledge and values critical to evaluation practice are articulated in various sets of evaluation competencies, published by different evaluation associations (for example AEA, ANZEA, CES, UKES). These competencies include both the technical and management skills required to carry out evaluations, as well as the interpersonal and contextual skills required to adapt to changing circumstances and engage stakeholders appropriately.

Case-centered teaching is particularly well-suited to the development of these competencies (Brock & Alford, 2015; Gatti Schafer, 2016). Case-centered teaching draws upon the existing knowledge and experiences of the learner while introducing new concepts, theories, and practices within a framework that can promote retention and retrieval (Austin & Packard, 2009). In addition, it encourages learning by discovery and is thought to increase learner motivation (Menzel, 2009; Mallinson, 2018). Case-centered teaching also provides a problem-solving safe space for students to learn from their instructor and each other through dialogue and engagement with a range of scenarios that accelerate their experience of organizational, intervention and contextual challenges. This interactive setting is more likely to prepare students for the complexities of evaluation practice by providing them with the opportunity to develop the tools and skills needed for practice, before they take on their professional duties (Brock & Alford, 2015).

However, rich cases that capture experience for reflection and learning have largely eluded professional training in evaluation. Moreover, there is little guidance for evaluation educators and instructors from a range of settings interested in developing students' competencies in line with current competency frameworks. There is also a paucity of information in terms of whether instructors use cases, and if case-centered teaching supports competency development in evaluation.

This chapter will focus on the latter issue and describe the findings from an exploratory study of how instructors use cases to support the development of evaluation competencies. We will share ideas from international instructors from a range of settings - face to face, online, in both academic and professional development - on how cases can be used to support the development of evaluation competencies. Specific suggestions, examples and ideas will be provided as guidance to instructors interested in competency development through cases.

Our proposed methodology features an electronic survey and key informant interviews. The survey sample will be composed of English-speaking evaluation instructors belonging to International Society of Evaluator Education (ISEE), the Canadian-based Consortium for University Evaluation Education (CUEE) and the American Evaluation Association Topical Interest Group (AEA TIG) Teaching of Evaluation. This will ensure representation of instructors from the academic and professional development sectors from a range of countries. Personal contacts will also be leveraged to include as many evaluation instructors as possible and to cover various evaluation teaching modalities. The key informants will be identified through the survey.

The survey instrument will be based on the literature review presented in Chapter 2 as well as our own review of the case-centered skill development literature in other fields. In order to ensure that all respondents are able to share their current instructional practices, we will not impose one single competency framework; rather, we will create a framework that aggregates the common domains across country-specific competency frameworks. Respondents will provide information on the use of competency frameworks and case-centered teaching. The ways in which instructors bridge the two to create meaningful learning experiences for learners will also be explored. The key informant interviews will delve more deeply into the cases themselves and how they are developed and used and enable us to provide concrete examples; the cases will then be added to the CASE Collective's repository of cases, described in Chapter 4. Ethics approval will be obtained through the University of Ottawa's Research Ethics Committee.

Chapter 4. What are the Characteristics of Cases We Use to Teach and Learn Evaluation?

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Research on the uses of cases for teaching and learning is woefully understudied. The purpose of this paper is to describe the characteristics of existing cases trainers, instructors, learners, and practitioners utilize for teaching and learning evaluation. These descriptions provide insights for the evaluation field regarding areas for developing new cases and improving pedagogy when writing and using cases. We, more specifically, use content analysis to empirically study the meaning of what is represented in cases (Krippendorff, 2018). Content analysis is an appropriate methodological strategy because it provides an approach to identify what is communicated from a text to an audience, or in this study, from cases to learners.

We employed several steps to identify our sample of cases. The CASE Collaborative members first generated a list of cases, and solicited cases from colleagues, members of the International Society for Evaluation Education, and during presentations at professional association conferences (e.g., American Evaluation Association in 2019). Sources for the cases ranged from textbooks, supplemental textbooks, websites from organizations involved in evaluation (e.g., professional associations, foundations, evaluation and research firms), journals, and unpublished instructor-developed documents. Next, the team developed inclusion and exclusion criteria for initial content analysis. Cases from textbooks were excluded from this study for several reasons. Evaluation educators can easily identify cases in textbooks, and based on collective experience

these cases are typically exemplars. Excluding cases in primary textbooks, a total of 122 cases have been identified to date.

After the sample was identified, seven CASE Collaborative members developed a coding tool that addressed four main areas: qualities of the evaluand (e.g. sector, geographic location), qualities of the evaluation (e.g., evaluation theory/approach, methodological design), ethical principles/standards/competencies addressed, and the nature of the cases for teaching evaluation (e.g., open or closed; stated learning objectives). The tool includes a brief set of questions on all cases. One of these questions was to classify the cases as closed or open. The tool then included distinct questions for closed and open cases. The questions focused on what the case was designed for, as presented, but also provided opportunities to indicate how the case could be used for teaching and learning.

In coding the cases, we assume that authors of cases explicitly used terms that aligned with knowledge and skills for professional evaluators. At the same time, learners and instructors may also infer the meaning of the content in cases, given understandings of professional practice in the field of evaluation. We pay particular attention to how beneficiaries and communities are represented in cases, in an effort to understand how issues of power, privilege, and oppression are evident in cases. This attention is justified because “demonstrates cross-cultural competency” was rated as one of six competencies high in importance and high in need of training by professionals in the evaluation field, out of the total 61 AEA competencies included in the survey (Galport and Azzam, 2017).

Although coding and analysis is ongoing, we briefly present some preliminary findings using descriptive statistics to summarize and represent trends in the qualities of the cases. Cases represent a variety of sectors in evaluation (see Figure 1), most commonly education (33.6%), social welfare/human services (20.5%), and health (18%). Although cases represent all areas of the globe, cases predominantly represent North America (61.5%) (see Figure 2). Finally, only 15% of cases specify evaluation standards, ethical principles, or competencies that they aim to teach. Should this observation hold true as we continue to code cases, it would suggest that, in general, cases have been written in such a way that they do not have a clear pedagogical intent or learning objective(s) that align with key professional guidelines. We also plan to do analyses based on subgroups of cases, particularly closed and open cases, to look more intently into how these cases may support student learning regarding ethical principles, standards and competencies. We see emerging patterns that cases tend to be closed, rather than open-ended, indicating they are not best-suited to support problem-based learning.

We conclude with implications for what areas the field may need to focus on developing cases. We also interpret the findings in relation to pedagogical practices identified in previous chapters in this volume, in addition to identifying study limitations. These conclusions inform evolving guidance to the evaluation field on content needs for developing evaluation teaching cases. Finally, the cases we are compiling and coding for this study will be the basis of an online database for evaluation instructors and practitioners to access cases.

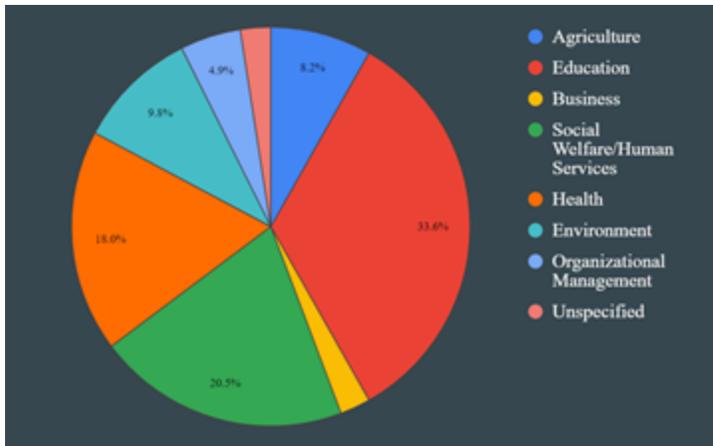


Figure 1. Sectors in evaluation represented in cases for teaching and learning (N = 122).

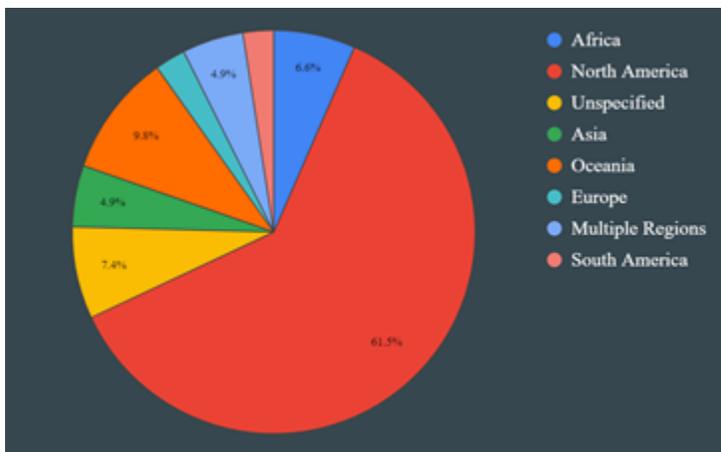


Figure 2. Geographic region represented in cases for teaching and learning (N = 122).

Chapter 5: How Do We Share Our Stories as Good Cases for Instruction?

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Often thought of as forms of entertainment, it is not uncommon for societies to employ oral histories, parables, fairy tales, myths and legends to facilitate learning. Narratives have been used to increase empathy, provide examples and exemplars, share knowledge, persuade others, alter behavior, and communicate norms (Shaffer, et.al., 2018). Within a social cultural perspective, stories and narratives can be viewed as cultural tools that mediate learning (Vygotsky, 1997).

Stories and narratives can also support learning within a profession. As professionals engage in practice, they may convert their experiences into professional stories. These personal narratives can support self-learning by assisting professionals as they make meaning of their practice. As

practitioners reflect on their practice (Schön, 1983) they can situate and organize their knowledge, skills, thinking, decision making and problem solving in relation to events and experiences that serve as the context of a professional story. Through inspection of one's own professional stories practitioners examine their practice, question themselves, understand themselves professionally, and make changes for future practice. As professional stories are developed and reviewed, they become a reservoir of knowledge, skills, thinking, decision making and problem solving from which a professional draws upon or modifies when addressing new work (Schön, 1983).

Well-crafted stories and narratives can play a significant role in educating those entering a profession (Lave, 1998). Professional stories illustrate authentic experiences by representing the context and culture of experiences (Bruner, 1990; White, 1981); demonstrating critical reasoning and actions of professionals in practice (Bruner, 1990; Huberman, 1995; Jonassen, & Hernandez-Serrano, 2002); allowing for vicarious experiences related to practice (Bruner, 1990); and allowing learners to understand the profession from the perspective of the expert (McEwan, & Egan, 1995). Often communicated directly between the learner and the expert (i.e., storyteller) during apprenticeships (Lave, & Wenger, 1991), stories can be valuable instructional tools when written down as cases for learners who do not have direct access to the expert.

A problem often arises in case development, when subject matter expertise is privileged to the exclusion of pedagogical knowledge and pedagogical content knowledge. We know from educational experts that the knowledge used for teaching extends beyond *specialized knowledge of content* (e.g., Ball, Thames, & Phelps, 2008; Baumert et al., 2010; Hill et al., 2008; Hill & Ball, 2009; Hill, Rowan, & Ball, 2005; Kersting, 2008; Kersting, Givvin, Thompson, Sangata, & Stigler, 2012; Lederman, & Gess-Newsome, 1992; Loughran, Milroy, Berry, Gunstone, & Mulhall, 2001; VanDriel et al., 1998). Teaching evaluation does require deep content understanding of the field; however, it also requires *pedagogical* and *pedagogical content knowledge* (Shulman, 1986). It is this knowledge that guides an educator's actions to promote learning. It is *pedagogical and pedagogical content knowledge* that uniquely differentiates the writing down of one's story from the development of one's story into a case for teaching.

When purposefully developed, professional stories can become instructional teaching cases. However, we believe several issues have hindered the development of instructional teaching cases in evaluation. Evaluators often lack the pedagogical and pedagogical content knowledge needed for writing well-crafted teaching cases. Said another way, we suspect that evaluators may not be familiar with how to write cases for the purpose of instruction. Given the nature of their own formal education, they may not be well-versed in literature on instructional design, task analysis, types of cases, frameworks for problem-based learning, etc.

In response to this problem, the purpose of this chapter is to assist evaluators, who are subject matter experts, in converting their professional stories into instructive cases. The first part of this chapter will provide guidance on using instructional design principles and practices to help evaluators include the pedagogical elements that can turn their professional story into a teaching case. The second half of the chapter will focus on establishing the guidelines for the different types of cases, building instructional supports and using checklists to self-assess their case's quality.

Turning professional stories into teaching cases. In this section of the chapter we will focus on how practitioners can develop useful cases to be used as instructional tools. We will provide information to help case builders by introducing the readers to practices within instructional design that they can use to translate their stories into practical instructional tools. This will include:

- Shifting their position from subject matter expert to instructional designer, by helping them think of their cases from the perspective of the learner.
- Using various forms of task analysis to deconstruct their story and identify critical elements that will need to be communicated in the case (Jonassen, Tessmer, Hannum, 1999).
- Helping them define the instructional purpose, goal, objective of the case in order to situate its development.
- Using the 3Cs-3Rs framework for problem construction to establish the blueprint of a case (Hung, 2006; 2008).
- Selecting the type of case (i.e., example/exemplars, well defined problem, critical analysis, and open-ended problem) to be developed (Jonassen, 2006, Anderson, & Krathwohl, 2000; Krathwohl, 2002).

Creating your teaching case. In this section, we will provide guidelines for developing each type of teaching case. This will include the guidelines for what needs to be included in the case, how to structure the case, and how to build instructional supports (e.g., strategies for presenting the case, additional resources, discussion questions, assessments) that will facilitate the use of the case by instructors. Drawing inspiration from the history of using checklists in evaluation (e.g., the Evaluation Checklist Project at Western Michigan University’s Evaluation Center), for each type of case, we will provide a checklist that practitioners can use to self-evaluate teaching case quality.

Chapter 6. How Do We Facilitate Learning with Cases?

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Christine Roseveare (See contact details above)

Marla Steinberg (See contact details above)

Tiffany Smith (See contact details above)

Although we have previously learned from, and taught with, cases, we approach case-centered teaching and learning with new insights and experiences based on our work in the CASE Collaborative and the previous chapters in this volume. Most evaluation trainers, instructors, and practitioners who teach with cases draw from their own experiences in designing and using cases in their teaching. This chapter provides additional insights to what has been shared in the previous chapters by presenting the reflections and learnings of three teachers of evaluation all of whom use cases in diverse settings. We present three contextually rich “cases” of teaching and learning evaluation through the use of cases. We engage in a collaborative reflective process

(Smith, Barlow, Peters, & Skolits, 2015) to consider the impact of case teaching on our learners and pedagogical practices.

The cases of teaching with cases will include the following learning settings:

- **Online Graduate Course and Face-to-Face Workshop for Practicing Professionals.** Leanne Kallemeyn uses cases in graduate courses for students in a variety of social science disciplines, particularly education, in on-line and face-to-face formats. She also is a member of the AEA Guiding Principles Working Group that supports the use of cases in training materials for AEA members. She plans to utilize cases in an AEA workshop on the Guiding Principles.
- **Undergraduate Online University Course.** Christine Roseveare uses cases in her online evaluation course for undergraduate health science students. A trained teacher and recent evaluation practitioner she came to the online learning environment with a background of using cases in face-to-face teaching and professional development workshops. She's enthusiastic about the potential of cases to support learning both in face-to-face and in the online environment.
- **Online professional development courses.** Marla Steinberg is a practicing evaluation consultant and the volunteer Director of the Canadian Evaluation Society's e-Institute, an online learning platform of self-directed evaluation courses. All e-Institute cases make extensive use of cases to support a variety of learning objectives.

In an effort to understand how cases shape learning and teaching, we will collect feedback on students' learning and reflect on our teaching practices and courses. Through engaging in reflective practice, we will surface best practices and lessons learned in teaching with cases. We will explore a variety of questions including: How do we choose appropriate cases, and which type of cases do we use in which contexts? How do we integrate cases into a larger curriculum? How do we prepare students to learn through cases? How do we facilitate a quality learning experience for students using cases? How do we know that the case is addressing and meeting the learning objectives? How do we ask the right questions to facilitate dialogue in response to cases? How do we ensure that learners share their diverse experiences in response to cases? We will explore these questions, among others, during the collaborative process among the authors of this chapter. Through this reflective process, we will identify lessons we learned that can support trainers and instructors of evaluation to use cases in their practice. We will also identify lessons from students that can support learning processes.

Chapter 7. What's Next for Cases in Teaching and Learning Evaluation? A Call to Action

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Introduction to the Chapter: This chapter will begin with an introduction that overviews two guiding questions: (1) "What have we learned about teaching and learning with cases in

evaluation?” and (2) “What’s next?” At the end of the chapter we provide a call to action for the readers of this volume in their future teaching, learning, and writing of cases.

What Have We Learned About Teaching and Learning with Cases in Evaluation?: In this section, we will reflect on the strength of the case that has been made for using cases in teaching and learning in evaluation. We will overview what has been learned about teaching and learning with cases in this volume, and discuss what counts as good case teaching and learning on the basis of the other chapters (including elements of inclusivity, exemplars versus problem cases, and how cases are used to meet learning objectives related to critical thinking, reflective practice, and evaluative thinking in development of evaluators' competencies). We will also reflect on the importance of the use of language and how different concepts melded together in this volume.

What’s Next: This section will outline what’s next, for both the Case Collaborative, practically, and implications for the field, leading to the call to action. The Case Collaborative will continue their work on the basis of this volume, and this section will overview the group’s intention to build a practical online database that is searchable as well as practical tools so that people can write and easily share cases to facilitate learning. Implications for this work will reiterate the importance of problem-based teaching and learning in the evaluation practice.

The Call to Action: Case teaching and learning is only as good as the reflection process it facilitates. In other words, good case teaching and learning comes from facilitating genuine and critical reflection on the case being presented, its key players, and its contextual nuances. We will reflect on how we can get new evaluators to think like professional, seasoned practitioners. Multiple indicators of reflective thinking, including problem-based learning, evaluative thinking, and others, have been presented in this work. We will be referring to and reflecting on these multiple indicators through the lens of reflective practice (e. g. Dewey, 1933; Mathieson, 2016; Schön, 1983; Smith et al., 2015; Smith & Skolits, under review; Stevahn et al., 2005; Yanow, 2009) and provide guidance on how to utilize these behaviors more intentionally in both the writing and facilitation of cases for teaching and learning.

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