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Note on Developing a Teaching Plan for an On-Line Class

I have taught only one case method course on line, so my thoughts clearly are nascent. In addition I was teaching an accounting course (management control systems) where the analyses tend to be a bit more structured than with some other subjects (although not as much as in a basic accounting course). On the other hand, as they say at Harvard Business School, a single—well designed—case study may shed a lot of light on a problem.

Based on my experience, I have a few ideas that an instructor might think about incorporating into an on-line teaching plan. I found these ideas increasingly helpful as the semester evolved, my anxieties lessened, and my confidence grew. Nevertheless, had I been given a choice between on-line teaching and waterboarding, the decision would not have been easy!

Discussion Questions

The class discussion is much easier, in my view, if you follow the discussion questions at the end of the case. If not, you probably should have a specific set of questions in mind, and communicate them to the students in advance. You should tell them to answer these questions rather than the ones at the end of the case. It is a lot more difficult to "wing it" with the questions when you are teaching on line.

"Blackboard" Plan

During the discussion of a case, I found it helpful to take notes on a Word document or something similar (I use Pages), much as I would have done on the board in a live class. Depending on the sharing platform (Zoom or something else) it may be possible for students to see this document as it emerges. However, I preferred to keep it to myself, and then make it available for all to see later on in the discussion. (This is mainly because I make a lot of typing mistakes and did not want to distract the students with my error corrections; it was bad enough that I was distracting myself!)

At some point, or maybe at several points, in the discussion, I would ask the students to review some or all of this document and comment on it. I would ask questions like "Has this recorded your views correctly?" "What important ideas have been excluded?" "Where do you see discrepancies?" "How might you resolve them?" I would sometimes ask a specific student if his or her views were adequately represented, or some such thing. This is because with an on-line course it is easy for some students to "tune out," and I wanted to try to avoid this as much as possible. This approach also allowed me to bring the shyer students into the discussion much more easily with a classroom class.

How often you break up the discussion to do this depends on your style and your goals, as well as the depth at which the discussion has taken place. Two or three times during the class seems about right to me, but, this clearly will vary depending on a variety of factors. The easiest approach is to present the document after discussing one of the questions, but this is not always as easy as it sounds as there are segues and connections involved.

This note was prepared by Professor David W. Young. It is intended to assist with case analyses, and not to illustrate either effective or ineffective handling of administrative situations.

Sharing of Documents

With on-line teaching, I tend to use more documents prepared in advance than otherwise. Since I teach accounting courses, these documents often take the form of a spreadsheet. Depending on a variety of factors (e.g., size of the class, progress through the semester, complexity of the analysis, etc.) I ask students to comment on the spreadsheet document. This is very tricky. You do not want the students to think they can rely on you to prepare an analysis for them to review rather than having them do it themselves. Getting the right balance can be very tricky.

I sometimes found it helpful to leave some blank spaces in the spreadsheet and to ask the students to fill them in. This helped me to deal with the advance-preparation problem. It also meant that I needed to suspend the discussion for a while, which is not necessarily a bad thing. Some students need time to recover from the distractions associated with on-line discussions, and to get their heads back in the game. In general, I would say that pausing for 5 or 10 minutes to ask students to fill in some information (whether in a spreadsheet or in some other framework or schematic) is not necessarily a bad thing.

Spreadsheets versus Frameworks

Courses in subjects other than accounting usually do not use a spreadsheet or some version of one. However, all courses that I know of use conceptual frameworks. Therefore, rather than a spreadsheet, an instructor could use a document that includes a framework (or some sort of conceptual structure) that students can use to organize their thinking.

Use of a framework like this is not normal in a case-method course. Normally, students need to figure out the framework on their own. My own view is that this a little silly. If a framework exists, give it to the students and ask them to use it. Clearly, this is a personal preference, and you may disagree with me. However, I believe that on-line teaching can benefit from students having a framework in advance rather than having them induce it during a discussion. On-line teaching introduces an efficiency factor that must be considered.

Role of Teams

I was fortunate to teach a course with very few students. Even with large courses, however, I think instructors need to think carefully about the role of teams in their on-line discussions. Also my class sessions were three hours long, rather than 80-minutes. So I had some flexibility. This does not change the importance of using teams; only in how you will use them.

In general, then, I think an instructor needs to consider how he or she might involve teams in the on-line discussion. Here are a few thoughts:

1. In my course, I normally would spend the first 30 minutes or so of the discussion getting the class to the point where there were some major issues identified and some unanswered questions. I would then ask the class to break into teams and I would ask each team to prepare a PPT slide to present its analysis to the decision-maker in the case.

   I gave each team 20-30 minutes to prepare its slide. This meant that the slide could not be prepared "on the fly;" the team needed to have some ideas beforehand about what is was going to present. I often found it helpful to distribute the "framework" document before class. The framework usually was contained in a reading, so it was not something new.

2. I would use the remainder of the class to have each team present and discuss its slide. How you divide this time depends on the number of students in your class and the number of teams. Perhaps not all teams can present for a particular case, so you need to be careful about how you create "sharing fairness."

3. My sharing platform (Google Hangouts) allowed me to "drop in" on each team while it was preparing its slide. (I assume that Zoom and others allow this). I could listen, offer suggestions or criticisms, and, in general, make sure they were focusing on the "right" issues.

This approach, in my view, allows an instructor to incorporate the role of teams (which is becoming increasingly important in the business world) into on-line teaching. With large class sizes and only 80 minutes per class, there clearly is a need to decide which teams will present. But this can be done fairly with a little extra work.

Team Memos

Because on-line discussions can be biased in ways that most of us do not yet understand, I added a feature to the course. I asked each team to prepare a one-page memorandum for each of five cases (the number clearly depends non the length of the course). Each memo was to be sent to the key decision maker in the case, discussing the team's analysis of the problem facing that person, and recommending a course of action. Fifty percent of each student's grade was based on the quality of these memoranda. This meant that much of the course grade was outside the on-line discussions. **Exhibit A** describes the nature of what I expected in these memos.

A key issue here is that the instructor does not need to be involved in all of the team discussions. Each team needed to figure out how it was going to organize its on-line interactions in order to prepare the memo.

Grading

In my view, the way students are graded in an on-line course must differ from how it is done in a classroom course. First, depending on the class size, it simply is more difficult for a student to make a contribution on-line rather than by raising his or her hand in class. Second, the idea of a summary page with questions asked directly to the shyer or less-involved students can help to bring them into the discussion. Third, I have found that asking teams to assess the contribution of their individual members helps to make sure that there are no (or at least fewer) "free riders" than otherwise might be the case" **Exhibit B** is the mechanism I use to do this.

Summary

I am sure that, as educators, we all wish that on-line teaching will go away once the pandemic is over. However, as many organizations have discovered, on-line communication will not disappear soon, if ever. As David Leonhardt discussed in a *New York Times* editorial,[1] many companies have found that on-line communication is the new norm. Therefore, as educators, we need to do our best to help our students adapt to the reality of the next several (or many) decades, during which on-line communication replaces face-to-face communication.

[1] https://www.nytimes.com/2020/07/10/opinion/sunday/coronavirus-economy-two-years.html

Exhibit A. Instructions for the Memos Prepared by Your Team

Each memorandum should be a team effort, and there should be no collaboration with individuals from other teams or with people outside the course.

Structure of the Memoranda. A memorandum may be single spaced, but it should be no more than 1 page in length, plus, if you wish, one page of exhibits. Please adhere to these limits—both in letter and spirit. Preparing a longer memorandum, using a multiple-page or fold-out exhibit, putting text on an exhibit, and so forth are inappropriate. In order to enforce the limits, I will not read beyond one page nor accept exhibits that fail to adhere to the above guidelines.

A memorandum should (a) be addressed to the decision maker specified in the assignment, (b) discuss what you consider to be the key issues involved in the decision, (c) present your analysis in a clear and concise fashion, and (d) where appropriate, recommend a course of action.

Grading Criteria for the Memoranda. While there is no "formula" approach to preparing a good memorandum, there are several criteria that I will use in assigning a grade. A memorandum earning a grade of 90 or above typically has the following characteristics:

1. It is analytical. That is, it adds value to the information available to you, and, in fact, may include information that you found from other sources. It analyzes the case data using concepts and frameworks from the reading or from other sources.
2. It is realistic given the recipient's scope of responsibility, and what, in general, is possible within his or her organization and its environment.
3. It is internally consistent and free from statements that have no factual basis. If it contains assumptions, they are both reasonable and clearly identified.
4. It makes good use of one or more exhibits.

Here are some common problems that characterize a memorandum receiving a low grade:

1. You don't really put yourself in the position of someone sending a memo to the recipient. Your recommendations are unrealistic or you don't provide the recipient with much guidance for taking action.
2. There are platitudes and/or statements that are relatively meaningless without some more specific information.
3. There is little or no analysis of case data. The readings you have done, prior case discussions, and other coursework should give you some frameworks to bring to your analysis. Your analysis should use those frameworks
4. Your memo has no exhibit(s). You can get a grade of 90 or above without an exhibit, but those instances are extremely rare. Since you only have one page for your text, and since there typically is much to analyze and discuss, you need exhibits to help with your presentation.

   Your exhibits do not need to be tables with numbers, although that is fine. You can use an exhibit to structure some information in a way that adds value, or to illustrate how a framework might be applied to case data, or even to summarize schematically something you are saying in the body of the memo. If nothing else, an exhibit, done properly, allows you to say more in your memorandum than otherwise would have been possible.

All team memoranda are due no later than the beginning of class on the assigned day.
They may be sent to me by E-mail earlier, if you wish, but late memoranda will have points deducted.

Note: Prior to sending me your memorandum please send it first to one of your teammates
to make sure that he/she agrees that it looks as your team wants it to look.
Then send it to me as a pdf file (not as a Word file)

Exhibit B. Accounting Team Member Assessment

Please evaluate each of your team members in terms of whether he/she was a responsible team member:

A responsible team member:

- Attends all team meetings, arrives on time, and stays for the entire meeting.
- Acts in such a way as to move the case analysis forward (e.g. contributes with questions, suggestions, research, analysis, constructive comments).
- Is collaborative in terms of the team's work process to prepare the final draft of the memorandum
- Helps the team be effective and efficient.

Any student deemed by the majority of his or her teammates to have ***not*** been a responsible member will receive a lower grade than the other team members. How much lower will depend on the comments that explain the reasoning for a "no" answer.

Your Name:

……………………………………………………………. Team #: …………

Other Team Members:

Name	**Responsible? Yes/No**
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For those people for whom you have indicated NO, please explain your reasoning and specify the applicable case(s) if appropriate. Use the back of the form if necessary.