

VALUES AND LEADERSHIP CASE STUDY

Purpose

- Examine ethical behavior in a compromising situation.
- Examine leadership skills in a confrontational situation.

Phase I—Case Narrative

The purpose of the case writing phase is to generate and produce a case for another group to analyze the ethical or leadership situation and to make a recommendation for action.

Phase I—Documents

Case Documents

- Executive Summary
- Case Narrative
- Exhibits A-E+
- Discussion Questions

Assessment Documents

- Process Assessment Memo
- Case Writing Rubric
- Performance Review Memo

Phase I—Guidelines

- **Case Situation.** Describe a situation that illustrates the need for an ethical decision or for leadership skills. Base the situation on an actual experience. Generate a list of possible situations based on personal or observed experience. (Create fictitious names.) Allow the following topics to stimulate your thinking.

Decisions based on

- convenience rather than rightness
- need to win, no matter cost or consequence
- rationalization
- literal obedience to rules or authority
- own needs
- group dynamics
- permission or forgiveness
- responsibility
- needs of others we know
- needs of others we don't know
- legal reason rather than a moral reason

Leader's misapplied skills of

- charisma
- commitment
- communication
- competence
- courage
- discernment
- focus
- generosity
- initiative
- passion
- relationships
- self-discipline

- **Narration and Opening.** Write the narrative so that the reader experiences the situation as it unfolds. No decision takes place in a vacuum. All decisions are part of a larger climate that the writer has an obligation to try to capture in the case. It's critical to capture the reader's attention early. A very popular and effective tactic is to begin with a brief vignette, such as an introductory sketch designed to draw the reader quickly into the case setting.

- **Objectivity.** The writer should not be an analyst. One word can make the difference between an objective description and biased interpretation of the facts. For example, suppose you write, “Mr. X decided to hold a strategic planning meeting.” This statement is a neutral description of an objective fact. But if you write, “Mr. X, unfortunately, decided to hold a population planning workshop,” your statement loses its neutrality. The single word *unfortunately* has changed the sentence from a description of fact to an expression of the author’s opinion. Attention to these minor details is crucial because the writer selects and frames the material presented. In selecting facts for presentation, the writer must continually guard against the injection of personal values and beliefs. The writer must let the facts of the case tell the story.
- **Decision Points.** The case must include decision points; that is, the case analyst should be provided with an opportunity to choose among alternative (and equally plausible) courses of action. The case writer may purposely choose to include distracters, much as the writer of multiple-choice questions includes alternatives to the correct answer. In this case, the distracters aren’t meant to mislead; they are meant to help the analyst deal with the complexity of real-life decision making.
- **Exhibits.** The case must include supporting exhibits. Most people are better able to grasp the essential nature of complex systems or the relative importance of statistical or financial data with a pictorial representation or background documents rather than with an elaborate verbal explanation. Readers who lack the necessary technical background will often be able to grasp and interpret pictures and graphs correctly, even though the underlying mathematical information may be highly technical. Examples of exhibits could include the following: flow charts, correspondence, policy statements, mission statements, performance reports, minutes, press releases, employee handbooks, proposals, or financial records. Include a minimum of five exhibits with the case.
- **Discussion Questions.** Include discussion questions in the final product and make them an integral part of the research from the very beginning. They’re important for at least two reasons. First, they give the writer self-generated feedback about whether the case is on track. Best cases are mere snapshots of a real situation. During the writing phase, the researcher must continually decide what to include and what to omit. Well-conceived discussion questions, developed early in the project, can act as a kind of riverboat pilot guiding and directing the writing and editing processes as they move through unknown waters.

The second reason is to help the reader use the case efficiently. In a very real sense, the discussion questions serve as a moderator between the writer and the reader. Good discussion questions guide the reader along a discovery path parallel to that of the writer. The object is *not* to bring the reader to some predetermined conclusion; rather, the objective is to make sure that no important landmarks are overlooked during the journey.

- **Case Writing Submission.** Submit the case in a neatly labeled pocket portfolio. In the left pocket include the executive summary and case narrative, and in the right pocket include the exhibits and discussion questions.

Phase II—Case Analysis

The case analysis phase has two purposes:

1. Analyze the ethic or leadership situation of the case to make a recommendation for action.
2. Evaluate the writing and documents of the case narrative portfolio.

Phase II—Documents

Analysis Documents

- Executive Summary
- Individual Analyses Memo
- LDS Recommendation Report
- Non-LDS Recommendation Report

Assessment Documents

- Revision/Exhibit Request Memo
- Case Narrative Assessment
- Performance Review Memo

Phase II—Guidelines

- **Individual Analyses.** Upon receiving the case narration portfolio, each member of the analysis group will individually read the portfolio without communicating with other group members. Each individual will write a memo (1000 words) to the other group members giving initial reactions and approaches to the case narrative. This step allows each to think through the situation separately to arrive at multiple perspectives.
- **Recommendation Reports.** The analysis group will write evaluate and respond to the case narrative through two formal recommendation reports. Each report should follow formal recommendation procedures of establishing criteria, applying criteria to case narrative, drawing conclusions, making recommendations, and presenting a written discussion. Each report should be 1250-1500 words using 3-5 outside sources for support. One report will rely only on LDS sources written to an LDS audience. The second report will rely only on non-LDS sources written to a non-LDS audience.
- **Case Analysis Submission.** Submit the case analysis in a neatly labeled pocket portfolio. In the left pocket, submit clean copies of the case narrative portfolio, including all exhibits, and in the right pocket include the executive summary, the individual analyses memos, and the two recommendation reports.

Phase III—Case Analysis Assessment

The case analysis assessment phase has two purposes:

1. Analyze the ethic or leadership recommendation for action from the case analysis.
2. Evaluate the writing and documents of the case analysis.

Phase III—Documents

Case Analysis Assessments Documents

- Executive Summary
- Evaluation of Analysis Rubric
- Evaluation of Analysis Writing Report

Phase III—Guidelines

- **Evaluation of Analysis Rubric.** The case analysis assessment group will create a rubric to evaluate the case analysis documents. The group will use the rubric to evaluate and grade the case analysis portfolio.
- **Evaluation of Analysis Writing Report.** The case analysis assessment group will establish criteria and write a formal report evaluating the writing of the case analysis documents. This report will include a grade recommendation and justification.
- **Case Analysis Assessment Submission.** Submit the assessment in a neatly labeled pocket portfolio. In the right pocket, include a clean copy of the case analysis portfolio (not the case narrative portfolio). In the left pocket include the executive summary, the evaluation rubric, and the evaluation of analysis writing report.

Phase IV—Case Study Response

The purpose of case study response phase is to provide each student to reflect on principles learned and applied through the case study project.

- **Reflection Letter.** After the original case narrative group receives a copy of the case analysis and of the case analysis assessment, each group member will write a formal letter (1000 words) addressed to the instructor addressing lessons learned to be a better writer or a better leader.