

## **ТЕОРЕТИЧНІ ЗАСАДИ ВИКОРИСТАННЯ ІНШОМОВНОГО КЕЙСА ЯК ЕФЕКТИВНОГО ЗАСОБУ НАВЧАННЯ ІНОЗЕМНИХ МОВ У НЕМОВНИХ ВНЗ**

**А.О. Борисова, В.О. Архипова, А.О. Колесник**

*Практичне володіння іноземними мовами неможливе без застосування інтерактивних методів та прийомів навчання, серед яких не останнє місце займає case-study (аналіз навчальних проблемних ситуацій). Написання кейсів (як студентами, так і викладачами), підготовка до їх обговорення, проведення командних та індивідуальних проєктів і ділових ігор, запрошення на заняття практиків є активною спробою виразити словами невербальні знання. Результатом дослідження є визначення авторами характеристик і критеріїв підбору матеріалу для створення якісних кейсів та рекомендації щодо проведення практичних занять з їх використанням, а також акцентування ролі викладача як модератора роботи студентів.*

**Ключові слова:** кейс, професійна компетенція, навчальний процес, аналітичні здібності, проблемна ситуація, комунікативна діяльність.

## **ТЕОРЕТИЧЕСКИЕ ОСНОВЫ ИСПОЛЬЗОВАНИЯ КЕЙСА КАК ЭФЕКТИВНОГО СРЕДСТВА ОБУЧЕНИЯ ИНОСТРАННЫМ ЯЗЫКАМ В НЕЯЗЫКОВЫХ ВУЗАХ**

**А.А. Борисова, В.А. Архипова, А.А. Колесник**

*Практическое овладение иностранными языками невозможно без применения интерактивных методов и приемов обучения, среди которых не последнее место занимает case-study (анализ учебных проблемных ситуаций). Написание кейсов (как студентами, так и преподавателями), подготовка к их обсуждению, проведение командных и индивидуальных проектов и деловых игр, приглашение на занятия практиков является активной попыткой выразить словами невербальные знания. Результатом исследования является определение авторами характеристик и критериев подбора материала для создания качественных кейсов и рекомендаций по проведению практических занятий с их использованием, а также акцентирования роли преподавателя как модератора работы студентов.*

**Ключевые слова:** кейс, профессиональная компетенция, учебный процесс, аналитические способности, проблемная ситуация, коммуникативная деятельность.

# THEORETICAL GROUNDS OF APPLYING CASE-STUDY AS AN EFFICIENT METHOD OF TEACHING A FOREIGN LANGUAGE IN A HIGH EDUCATIONAL ESTABLISHMENT

A.O. Borysova, V.O. Arkhypova, A.O. Kolesnyk

*It is impossible to have working knowledge of a foreign language without applying interactive methods and techniques of training such as a case-study. A distinctive feature of this method is creating a problem situation based on the facts of real life. The research was aimed at investigating and generalizing theoretical grounds of applying case-study in the teaching process. Criteria for the selection of material and the principles of creating good, quality cases as well as recommendations for organizing work during practical lessons with the use of cases determined by the authors can be considered as the result of this research. Practical work with the case should be organized with the help of method of moderation. It is focused at teaching students to work as a team, to make quick decisions under conditions of limited information and restrictions in time. Case-study method presupposes that the responsibility of a teacher is to motivate students' interest in the subject and the student must be sure that he is personally responsible for his education due to his preparation and participation in team work. Teacher's and student's actions at each stage of work with the case were defined by the authors. Using a case-study method in teaching students of Economics and Business can improve cognitive interest to studying disciplines to improve understanding of economic laws, to promote research, communication and creative decision-making skills.*

**Keywords:** *case-study, professional competency, educational process, range of knowledge, analytical and evaluative skills.*

**Statement of the problem.** Achieving the ultimate goal of education that is the transformation of knowledge into a system of values, development of the necessary attitude to the world and the natural course of action in a changing environment moving towards globalization, and in an organization that needs flexibility is impossible unless rely solely on lectures and tutorials. Various modern interactive methods and techniques of teaching foreign languages help to accomplish this task. The methods that do not require any special conditions or exceptional personal qualities are of great interest both for teachers and students.

Method of specific situations (method case-study) refers to non-gaming simulation interactive teaching methods. The immediate objective of the case-study method is to analyze a specific situation (case) by a group of students working together and to work out a practical solution. The proposed algorithms should be assessed and the best ones in the context of the problem should be selected at the end of the process.

Nowadays, the problem of introducing the case-study method into practice of higher education is very topical due to two trends:

- the first supervenes the general trend of education development and its orientation not so much to obtain specific knowledge, but mainly to form professional competence and skills of mental activity, to develop abilities of an individual with special attention paid to the ability to learn, shift of a paradigm of thinking and the ability to process huge amounts of information;

- the second supervenes the development of the quality requirements of a specialist who in addition to meeting the requirements of the first trend should also possess the ability of optimal behavior in different situations and is distinguished by systematic and efficient actions under conditions of a crisis.

**Review of the latest research and publications.** Case-study method is most widely used in teaching economics and business sciences.

Thomas G. offers the following definition of case study: "Case studies are analysis of persons, events, decisions, periods, projects, policies, institutions, or other systems that are studied holistically by one or more methods. The case that is the *subject* of the inquiry will be an instance of a class of phenomena that provides an analytical frame — an *object*— within which the study is conducted and which the case illuminates and explicates"[1].

Another suggestion is that *case study* should be defined as a *research strategy*, an empirical inquiry that investigates a phenomenon within its real-life context. Case study research can mean single and multiple case studies, can include quantitative evidence, relies on multiple sources of evidence, and benefits from the prior development of theoretical propositions [2]. This is also supported and well-formulated in (Lamnek, 2005): "The case study is a research approach, situated between concrete data taking techniques and methodological paradigms"[3].

At present time there are two classical schools of case-study: Harvard (American) and Manchester (European). Within the frames of the first school the purpose of the method is to train students to find the only one right solution, the second school presupposes polyvariance of a problem solution. American cases are larger by volume (20-25 pages of text, plus 8-10 pages of illustrations), European Cases are 1,5-2 times as shorter.

Today case-study method has a leading position in education; it is widely used in international practice of business education and is considered one of the most effective ways to teach students to acquire skills of solving typical problems. So Harvard Business School allocates nearly 90% of training time to the analysis of specific cases, maintaining priority of case-study method in teaching business. Situational training according to Harvard method is an intensive training of students using video, computer and software. University of Western Ontario (Canada), one of the famous

universities in North America, also relies on the use of situational training.

Generalizing all known definitions of case, we can say that a typical case is a story based on real problems or situations that is not only the description of events but a unified information platform that allows understanding the situation and making a decision. It is a tool that allows applying theoretical knowledge to solving practical problems that helps to develop students' independent thinking. Case presents the basic details of the problem situation and illustrates its complexity in a concise written form.

Being an interactive method of teaching case-study method gains a positive attitude on the behalf of students, providing assimilating of theoretical grounds and mastering practical use of the material, and it effects professionalization of students, contributing to their adulthood, generates interest and positive motivation towards learning. Simultaneously, case-study method also represents the way of thinking of a teacher, their particular paradigm that allows thinking and acting differently, updating their creative potential.

**The objective of the research** is to investigate and generalize theoretical grounds of applying these efficient teaching tools that are case-studies that contribute to the mastery of foreign languages and the overall implementation of the goals of education: practical, educational and evolving.

**Presentation of the research material.** Case can be made on the basis of generalized experience, but it should always contain the most of actual information, some specific facts to which a few fictional events related to the topic of practical class may be added that help students to understand the situation and express their thoughts in a foreign language. Usually, case method has much in common with speech exercises of communicative orientation, discussion of articles, role plays: classroom work technique will be the same in many cases. The difference between the case-method and the traditional methods of learning is most probably in the specific training effect in which it should result.

Traditional teaching methods, especially familiar to all lectures and practical classes, stipulate that the teacher is the source of knowledge, wisdom and truth. His duty is to deliver this knowledge, wisdom and truth to students. Obligation of students is to absorb what the teacher tells them. If students do not understand material they ask the teacher questions. Thus, the knowledge and the truth will always flow in one direction only: from a teacher to a student.

The task of case-study is not merely to deliver knowledge but to teach students how to cope with unique and ungraded situations that we

usually deal with in a real life. The focus in the case of case-method is transferred from the process of delivering knowledge to developing skills of analysis and decision-making [4].

From the perspective of a teacher working with cases is a form of an educational process that is aimed at the formation and development of conversational skills of students. The task of a teacher is to select the appropriate foreign language material based on real examples of real people, organizations, etc. Students also have to solve the problem facing them and obtain the respond to their actions from their fellow students and teachers. The teacher helps students to contemplate, discuss, but not to impose their solution. Thus, the educational purpose of using case studies in the educational process is implemented in a veiled form, as a teacher only directs the conversation or discussion using problem questions that are closely related to the future profession of a student, and engages all students of the group to discuss the case.

The responsibility of a teacher is to motivate students' interest in the subject: to create such an environment in the classroom that encourages students to share their own ideas, knowledge and experience and participate in the analytical process. The duty of a student is bringing in their active consideration into the educational process. The student must be sure that he is personally responsible for his education. The purpose both of teachers and students is to create in the classroom such an environment in which students can develop or at least apply the skills of knowledge and behaviour that future graduates will need to solve the problems that await them in their workplace after completing their training. Teachers encourage students to master their theoretical knowledge and practical skills.

There are several ways to get a foreign-language case, suitable for using in the educational process. First, a ready case can be bought or found in the contemporary media. Second, the teacher can independently process information that can be found in the media or foreign scientific journals, the Internet, etc., to develop problem assignments and after that use this own prepared case at foreign language practical classes.

To apply efficiently case-study and other interactive methods in the educational process foreign language teachers should ensure the five major organizational backgrounds:

- First, the cases should be considered only as one of the many possible interactive teaching methods and should be used in combination with them because case-study is a tool for achieving the goals of training highly qualified professionals who can orient well enough in a problem situation and are able to make a decision.
- Second, a vast mass of cases used in the educational process

should be based on the actual foreign language material that is well known both for teachers and students.

- Third, the teacher who is a moderator of the case discussion must realize their new role in the educational process that differs significantly from the traditional perception.

- Fourth, students also should occupy a new position in the process acquiring knowledge and skills: each of them is personally responsible for the quality and the final result of training.

- Fifth, the entire organization of the process should be actually aimed at creating new knowledge.

The conclusion is obvious: teachers have to create their own authentic cases. The question is how to start. It is advisable to begin with clearly defined objectives of the course topics: in what context this case will be used? In other words what is its place in the curriculum of the subject (a foreign language of professional orientation or a business language), what purpose it will be used for? And what is more important: what theoretical concepts you are planning to cover using the discussion of this case? Precise answers to these questions will help you to select effectively the object for case- study and to plan its structure.

Beyond decisions about case selection and the subject and object of the study, decisions need to be made about purpose, approach and process in the case study. Thomas thus proposes a typology for the case study wherein purposes are first identified (evaluative or exploratory), then approaches are delineated (theory-testing, theory-building or illustrative), then processes are decided upon, with a principal choice being between whether the study is to be single or multiple, and choices also about whether the study is to be retrospective, snapshot or diachronic, and whether it is nested, parallel or sequential [5]. It is thus possible to take many routes through this typology, with, for example, an exploratory, theory-building, multiple, nested study, or an evaluative, theory-testing, single, retrospective study. The typology thus offers many permutations for case study structure.

According to the experts, a number of features of quality cases can be identified [6; 7].

1. Case is a well presented story: it involves sequence of presentation of events, presentation of information, the plot, the structure and a good language both second and native ones. Case contains actual information about a real company, a product or a service.

2. Case has to openly or implicitly cover important professional issues and be a subject to the general purpose and speciality of students and the subject we teach and be of interest to students. Case-study develops managerial skills such as the ability to separate the most important

information from the less important one, to ask precise questions, to diagnose the main problem clearly and to elaborate and evaluate alternative variants of its solving.

3. Case describes the dramatic situation in which a decision must be made. There should be some drama, the struggle of conflicting interests in a case.

4. Case must contain contrasting comparisons because such information facilitates analysis of the situation and provides a basis for comparison.

5. It would be nice if the case concerned events that occurred recently, in the past five years. Students have more interest in the material, which they associate with the news rather than History textbooks.

6. Case should be neither too short nor too long.

Do not forget that the case-studies in a foreign language require a lot of time for lexical and grammatical processing of the text containing professionally – oriented material besides working at the case itself. It is desirable when a foreign language case is presented on not more than two pages that must be written so professionally to cause lively and intensive discussion in a foreign language in the classroom.

Well-structured and well-chosen cases are mainly rewritten, adapted and smarten several times. Besides, the authors frequently change and write up the case after they have used it several times in the classroom and thus found out that the case needs updating.

Sometimes the case can be followed by a video material that allows students to see the people in question in the case.

Having studied a large number of methodological materials on topic the authors have come to a conclusion that to use case-method most efficiently the entire process of work should be divided into three phases:

- before conducting a practical class;
- during the class;
- after the practical class (see Table).

Table

**Actions of a teacher and a student at each particular phase**

Stage of work	Teacher's actions	Student's actions
Before the class	<ol style="list-style-type: none"> <li>1. selects the case.</li> <li>2. Defines basic and auxiliary materials for students' preparation.</li> <li>3. Develops a scenario of the class.</li> </ol>	<ol style="list-style-type: none"> <li>1. Gets the topic for preparation.</li> <li>2. Prepares for the class individually: revision of foreign language professionally-oriented lexical material.</li> </ol>
During the class	<ol style="list-style-type: none"> <li>1. Distributes text of the situation for individual study: the assignment, methodical instructions, handouts are given out.</li> <li>2. Organizes preliminary discussion of the case focusing on key points of the case.</li> <li>3. Divides the group into sub-groups, appoints a moderator (leader) for each subgroup separately.</li> <li>4. Manages case discussion in the subgroups if necessary provides additional information.</li> </ol>	<ol style="list-style-type: none"> <li>1. Studies the given foreign language text material on the topic (reading, translation if necessary).</li> <li>2. Asks questions that help to understand better the case and the posed problem.</li> <li>3. Develops variants of solutions, listens to what others say and exchanges views.</li> <li>4. Participates in the decision-making.</li> </ol>
After the class	<ol style="list-style-type: none"> <li>1. Evaluates students' work: analyzes the progress of each subgroup and each participant of the discussion separately. Criteria of rating: activeness, the ability to make logical conclusions about the appropriateness of the decisions made, language competence.</li> <li>2. Evaluates the decisions made and the questions asked.</li> </ol>	<ol style="list-style-type: none"> <li>1. Draws conclusions after the class, writes mistakes/ new words etc.</li> </ol>

To increase the intensity work each group is divided into sub-groups of 3-5 students each: the less people work in a subgroup, the more each of them will be involved in communicative activities in a foreign language in the process of decision-making.



Case method helps to develop the ability to analyze a situation, evaluate alternatives, to select the best option from the proposed alongside with the development and further improvement of communicative skills of students, the development of all aspects of language communication in a foreign language.

Organizing work with the case the so-called method moderation is used. It is aimed at teaching students to work as a team, to make quick decisions under conditions of limited information and restrictions in time. Each sub-group makes decisions based on the use of scientific methods of conducting research:

- examination (reading case, understanding it, translation if necessary);
- case analysis (discussion of the quotations and the posed problems by the students);
- experiment (search for the ways out of the situation, improvement, business decisions making).

While working with the case all moderation activities are performed in the following sequence:

- a) preview reading of all information presented in the case with translation of the most difficult, incomprehensible parts if necessary;
- b) exchanging opinions on the information received;
- c) selecting information relevant to the tasks and problems assigned by the teacher;
- d) working on the problem (discussion and debate) in the subgroups;
- d) making decision about problem in the subgroups;
- e) general discussion for making the final decision;
- g) the reasoned conclusions.

**Conclusion.** While working at the selection of materials for creating cases and highlight of problem issues, the authors tried to find answers to questions related to the characteristics and criteria of the creation of the good, quality cases. Criteria for the selection of material for cases can be considered as the result of this search. In the authors' opinion a good foreign language case:

- informs, has a plot and factual material;
- focuses on the topic that is of interest for the students;
- should not go beyond the last five years;
- should contain the quotes and statements from the company's materials sources (written or oral, formal or informal);
- should include issues understandable and interesting for the students of our country according to their age;
- teaches decision-making skills (management). That is, some case-

studies document the process of managing a business presenting a model that can be an example of real business life.

#### Список джерел інформації / References

1. Thomas G., (2011), “A typology for the case study in social science following a review of definition, discourse and structure”, *Qualitative Inquiry*, 17, 6, 511-521.
2. Flyvbjerg B., (2006), “Five Misunderstandings about Case-Study Research”, *Qualitative Inquiry*, 12, 2, 219-245
3. Lamnek Siegfried. *Qualitative Sozialforschung. Lehrbuch*. 4. Auflage. Beltz Verlag. Weihnhein, Basel, 2005
4. Шеремета П., Канищенко Г. *Кейс-метод: з досвіду викладання в українській бізнес-школі* / П. Шеремета, Т. Канищенко — К.: Центр інновацій та розвитку, 1999.  
Sheremeta P., Kanischenko G., (1999), *Case method: from the experience of teaching in a Ukrainian business-school* [Keis metod: z dosvidu vykladannya v ukraynskiy biznes-shkoli], Innovations and Development Center, Kyiv.
5. Thomas Gary (2011), *How to do your Case Study*, Thousand Oaks: Sage,
6. Lynn Laurence. *The Case Method: An Overview Method for International Teachers*. The University of Western Ontario, 2002, p. 16-21.
7. Erskine J. A., Leenders M. R., (1999), *Case Research: The Case Writing Process*. University of Western Ontario.

**Борисова Аліна Олексіївна**, доцент, зав. кафедрою іноземних мов, кафедра іноземних мов, Харківський державний університет харчування та торгівлі. Адреса: вул. Клочківська, 333, м. Харків, Україна, 61051. Тел.: 349-45-69; e-mail: kaf1402@mail.ru.

**Борисова Алина Алексеевна**, доцент, зав. кафедрой иностранных языков, кафедра иностранных языков, Харьковский государственный университет питания и торговли. Адрес: ул. Клочковская 333, г. Харьков, Украина, 61051. Тел.: 349-45-69; e-mail: kaf1402@mail.ru.

**Borysova Alina**, associate professor, head of foreign languages department, department of foreign languages, Kharkiv State University of Food Technology and Trade. Address: str. Klochkivska, 333, Kharkiv, Uksaine, 61051. Tel.: 349-45-69; e-mail: kaf1402@mail.ru.

**Архипова Вікторія Олександрівна**, доцент, кафедра іноземних мов, Харківський державний університет харчування та торгівлі. Адреса: вул. Клочківська, 333, м. Харків, Україна, 61051. Тел.: 349-45-69; e-mail: kaf1402@mail.ru.

**Архипова Виктория Александровна**, доцент, кафедра иностранных языков, Харьковский государственный университет питания и торговли. Адрес: ул. Клочковская 333, г. Харьков, Украина, 61051. Тел.: 349-45-69; e-mail: kaf1402@mail.ru.

**Arkhyova Victoria**, associate professor, department of foreign languages, Kharkiv State University of Food Technology and Trade. Address: str. Klochkivska, 333, Kharkiv, Ukraine, 61051. Tel.: 349-45-69; e-mail: kaf1402@mail.ru.

**Колесник Аліна Олексіївна**, канд. техн. наук, доцент, кафедра іноземних мов, Харківський державний університет харчування та торгівлі. Адреса: вул. Клочківська, 333, м. Харків, Україна, 61051. Тел.: 349-45-69; e-mail: kaf1402@mail.ru.

**Колесник Алина Алексеевна**, канд. техн. наук, доцент, кафедра иностранных языков, Харьковский государственный университет питания и торговли. Адрес: ул. Клочковская 333, г. Харьков, Украина, 61051. Тел.: 349-45-69; e-mail: kaf1402@mail.ru.

**Kolesnyk Alina**, Cand. of Techn. Sc., associate professor, department of foreign languages, Kharkiv State University of Food Technology and Trade. Address: str. Klochkivska, 333, Kharkiv, Ukraine, 61051. Tel.: 349-45-69; e-mail: kaf1402@mail.ru.

*Рекомендовано до публікації канд. філол. наук І.В. Удовенко, канд. філол. наук, М.В. Арделян.*

*Отримано 15.03.2014. ХДУХТ, Харків.*