

# Cases Aren't Just for Students

by Ken White

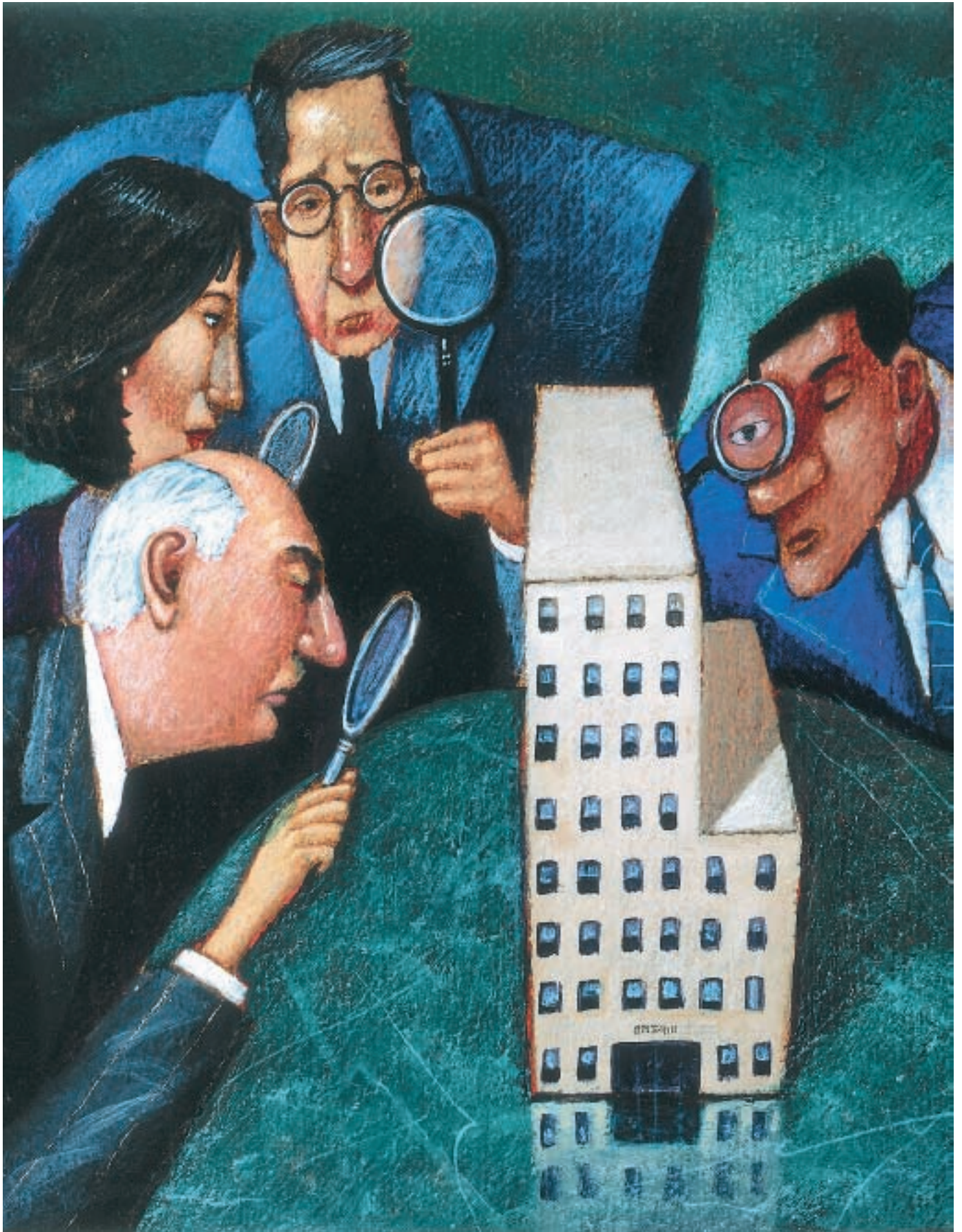
**T**he case method is the primary way many business students learn about business. After all, cases help bring to life many of the problems that business face every day. But why should a business school limit the use of cases to its students only? Why shouldn't a school also use cases to engage its board of trustees?

For many business schools, the drill leading up to a board meeting is the same. After reviewing binders filled with documents, reports, and metrics, the trustees travel to campus to hear the school's leadership deliver one presentation after another that showcase what has happened at the school since the group last convened.

The problem? This approach doesn't truly immerse the board in the day-to-day challenges of the school. It also does little to encourage board members to brainstorm solutions or share their insights, nor does it allow school administrators to fully tap each member's expertise and experience.

The University of Virginia's Darden School of Business in Charlottesville has transformed its interaction with board members by using an approach long proven in the classroom—the case method. By introducing a written case at each trustee meeting, Dean Robert Bruner more vividly conveys the complexity of strategic challenges the school faces. Moreover, he turns what could be a one-sided presentation into a lively exchange of ideas that reveals a wider range of solutions.

The University of Virginia's Darden School of Business uses the case method to inspire spirited discussions with its board of trustees.



## The Case Basics

Each case, which is sent to board members a few days prior to the meeting, is created specifically for the trustees by a member of the dean's staff who is familiar with Darden's strategic initiatives. It is written in a straightforward format: It presents an issue that the school currently faces, outlines the historical and contemporary contexts in play, and offers the perspectives of the dean and faculty on the issue.

For example, a case study asked trustees to consider whether a recent donation should be used to increase Darden's emphasis on research—and, if so, how? In seven pages, the case's narrative first outlined the school's placement in the rankings and described the current state of its faculty. It presented to trustees the rate of growth in tenure-track faculty since 2005, the addition of faculty in new areas of study, and the emergence of several rising stars.

Once it offered relevant historical information, the case presented four ways Darden could support its faculty's research efforts: paying for research leaves; increasing salary and research support to reward and recruit faculty; adding research assistants and case writers; and expanding the doctoral program.

It also introduced examples of specific faculty whom such changes could affect and presented problems that could arise: How, for example, would the school compensate for the absence of a valuable faculty member during a paid leave? How could it attract new faculty with generous salaries and benefits, while staying fair to existing faculty? How much extra research support could the school realistically provide? Would an expansion of its doctoral program help the school achieve its goals?

Finally, it explained the criteria Dean Bruner and his associate deans would use to evaluate these options, as well as

## To Engage Your Board With Cases....

**Capture the "story" of the case.** A business school should not be held back by a lack of case writing experience among its faculty and staff. Anyone with experience in journalism can write a compelling case with the help of someone who understands the nuances of the issue, says Maureen Wellen, Darden's director of strategic initiatives.

"Case writing requires someone with the skills to capture the 'story' of the case," says Wellen, who has written two cases for Darden's board meetings.

The trick is to leave off the ending, Wellen notes. "That part gets done 'live' in the discussion," she says.

**Follow a straightforward format.** Each case should offer the board a clear view of the issue at hand. The format should include the problem facing the school; the historical, current, and competitive factors that come into play; examples that illustrate and clarify these factors; and the central questions school leaders are considering before they choose a strategic direction.

**Guide—don't lead—the discussion.** Even though this is a board meeting, this is no time for Robert's Rules of Order. The dean or another school leader should guide the meeting much as he

would a class, by writing the group's thoughts on a whiteboard, calling on those with raised hands, returning to the issue if the group digresses, and stepping back once discussion begins in earnest.

**Invite others to sit in.** Depending on the subject of the case, faculty, staff, and even students who do not ordinarily attend board meetings may have something to offer the discussion. Having a professor or department head in the room can be useful when specific questions arise.

For example, at a recent Darden board meeting that included

a case about faculty research, a group of faculty was asked to participate. The professors were able to answer trustees' questions about research, teaching loads, salaries, retirement, and executive education.

**Use cases to connect to other stakeholders.** Board members aren't the only group that will respond favorably to a school-centered case study. Darden has used one of the cases that it originally wrote for its board as the centerpiece of a Darden Reunion Weekend activity where faculty led alumni in a case-based discussion.



**Trustees Doug Lebda (left) and Wal Shill discuss the case during a break.**



**Darden trustees begin their discussion of the case.**



**Dean Bob Bruner (standing) calls on trustee members as they raise their hands to offer their perspectives.**

the questions they have to consider. The remaining 17 pages included supplementary materials.

While MBA cases are designed to teach students a particular business skill or principle, cases written for trustees are designed to draw out the board's best ideas. Each case systematically provides the relevant facts, presents the dilemmas, and asks the questions that most vex school leadership.

### **Return to the Classroom**

Perhaps the most unusual aspect of this activity is not the case itself, but where the board members meet to discuss it: in a classroom with tiered seating, rather than in a conference room with a standard U-shaped table. Bruner made this change in an effort to increase interaction.

Once the board reviews the facts of the case, discussion begins in earnest. Bruner facilitates the exchange by writing comments on the board, organizing the group's thoughts into categories, calling on trustees when they raise their hands, soliciting input from the quieter members, and stepping back from the conversation as it unfolds. He begins the conversation with a "cold call"—randomly choosing a trustee to review the case or answer a question about the material.

Many board members still remember how nerve-racking cold calls were when they were students. Now that they're trustees, however, they find that this process becomes a way to reconnect with the school and with the conversation.

"One of the reasons cases work is because our trustees fall right back into the pedagogical process they experienced while learning with cases," says Ted Forbes, CEO of the Darden School Foundation.

This format also allows members of Darden's leadership team to play a larger role during meetings. In more traditional meetings, they were mainly observers, sitting in an


outer circle surrounding the trustees. During case discussions, however, they sit among the board members to share facts, expertise, or opinions.

The familiar and comfortable classroom environment invites participation from all comers, says Bruner. "We are an institution of higher learning," he says. "Holding the meetings in a classroom is a constant reminder of that."

### **Bring out a Board's Best**

Besides offering school administrators a wider range of ideas, using cases in a board setting offers a second bonus, says John Macfarlane, chairman of Darden's board and chief operating officer of Tudor Investment Corporation. Cases streamline discussion and eliminate the "turf wars" that can often arise among trustees. "Utilizing cases makes for a more open and frank discussion," he says. "It can be an excellent team-building exercise that leads to understanding, cooperation, and a unified agenda."

Designed to encourage conversation and interaction, these cases have inspired spirited, thoughtful, and civil discussions that are no longer confined to the board meetings. The trustees often talk about the case at dinner the night before the meeting, as well as at lunch and during breaks the next day.

That capacity to provoke spontaneous discussion and interest is exactly why case studies are as useful in the boardroom as in an MBA classroom. A well-written case narrative not only engages and informs board members better than any static presentation, but also provides a school with the very best ideas, opinions, and advice their experience has to offer. 

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