A Short Guide to Writing and Teaching Inclusive Cases

Case studies are the backbone for many graduate-level courses, allowing students to immerse themselves in a "real-life" setting for coursework applications. The real and/or imagined scenarios are a crucial pedagogical tool for exposing students to decision making processes, strategy challenges, organizational behavior, and leadership/management dilemmas. The Harvard T.H. Chan School of Public Health, too, utilizes a variety of cases across departments (global health, health management, policy etc.).

Given the centrality of case-based learning to many students' coursework at Harvard Chan, when case protagonists that reflect racial diversity as well as other marginalized identities are omitted, we are doing a disservice to the teaching and learning experience. When omissions exist, students do not experience the value of diverse protagonists who represent non-dominant identities in the fields of Public Health, Business and other industries, and students who do not see themselves represented in these cases may feel marginalized by the course materials and subsequent discussions. The solutions include identifying more inclusive cases for use, updating aspects of cases currently in use where possible, supporting faculty in sourcing and adopting new cases, and providing guidance for teaching cases with a DEI lens.

To commit to schoolwide diversity, inclusion, and equity goals, the Office of Educational Programs partnered with the Office of Diversity and Inclusion to pilot a case study review initiative of the primary cases used across disciplines at HSPH. An audit of 106 cases in use during Academic Year 2020-2021 was undertaken, reviewing these cases through a DEI lens. The project yielded key reflection questions and principles that can promote the use of an equity lens when writing and teaching cases. Please see below.

Writing Cases

Before writing, case-writers should reflect on the scenario, characters, and context they aim to pen down. Questions to contemplate include:
1. Are they writing cases with diverse protagonists and characters? Are identities of "diverse" protagonists one-dimensional, or are they intersectional and/or extend beyond gender/race?
    1.1. What information needs to be gathered when writing about the protagonist's identity? How can the protagonist's intersecting identities and experiences affect the dilemma at hand?
    1.2. What power dynamics are at play that intersect with protagonists'/other characters identities? Could this be relevant to solving the scenario?
2. What are the historical, cultural, social, and economic contexts to consider? How are characters' identities shaped by these factors and contexts?
3. Are stereotypes being perpetuated? I.e., are female protagonists relegated to "pink" or female-oriented industries/dilemmas or reinforced as community-oriented leaders? Are female/non-white leaders questioning their own agency and competence in the case (which rarely occurs for white male protagonists)? Are quips about characters from certain

backgrounds made, such as "XX was the only <insert ethnic background> person on the Forbes 500"—especially without further discussion or need?
4. Are DEI topics covered or included superficially?
    4.1. Does the case include DEI topics outside of human resources, culture, evaluation practices? For a full list of DEI topics and disciplines to consider, [click on this resource (pages 9-11)](#)

When writing the case, be aware of the phrasing and language used. Inherent biases can shape students and instructors' perception of the case and of the business world. For example, including identity qualifiers for only non-white/non-heterosexual/non-male characters inadvertently reinforces the image of heterosexual white males as ideal CEO/consummate leaders and managers. This further posits white males as more "neutral" protagonists rather than characters whose identities also play a role in their management/leadership styles and work culture. Make sure to incorporate such context on power, privilege, and inequities for the scenario at hand, as these issues come into play during real world settings.

Post writing, take a moment to reflect on the context and phrasing used. What is excluded is as telling and impacts perceptions as what is included. Once again, when writing cases with a DEI lens, be sure to not touch on issues of inequalities and privilege superficially (i.e., only in certain types of cases like human resources). DEI extends across industries, objectives, and disciplines, and cases should reflect this universality and complexity.

Teaching Cases
DEI principles can still be applied when teaching already written or older cases:
1. Try to choose cases with diverse protagonists and intersectional identities
2. If geography has little impact on the discussed topic, try to vary setting/geography to reduce US-centrism
3. Discuss with students how both characters' identities and surrounding historical, social, and economic contexts affect the dilemma at play
4. Consider who is being represented, who is left out, and how different characters are being portrayed
    4.1. How are protagonists' identities being portrayed as in affecting their decision-making/actions?
    4.2. How are characters' social backgrounds affecting their view of the dilemma and probable solutions?
        4.2.1. How do issues of influence, decision-making power, and personal identities/background affect the dilemma at hand?

Overall, it is important to not teach the case in a vacuum-sealed silo, as personal identities/experiences and historical, social, and economic contexts affect the protagonists/stakeholders, the dilemma on hand, and the proposed solutions. Implementing a DEI lens when teaching cases allows students to broaden their perspectives, garner a more "real-world" feel, appreciate equity efforts, and become better and more inclusive future leaders.

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Helpful Links:
1. Other tips for writing diverse and inclusive cases beyond superficial DEI subtopics can be found in Berkeley Haas's *The State of Diversity, Equity, and Inclusion in Business School Case Studies* [full report here](full%20report%20here).