Live Cases:
Service-Learning Consulting Projects in Business Courses

Susan Hayes Godar
William Paterson University

Business school faculty are excellent prospects to incorporate service-learning into their courses. Given their long-standing use of a live case approach in which their classes perform consulting projects for for-profit companies, they can also be encouraged to use not-for-profit organizations for these projects. In this paper, suggestions are made to community service coordinators on how to encourage the use of consulting service projects among business faculty. Examples of projects in marketing and management courses are given. How to implement this type of activity in a business course is also discussed.

The Live Case Model in Business

What do you suggest to improve this course?
No group project. I think it was too strange to work with those people.

What aspects of this course were most beneficial to you?
The group project. Real first hand experience was valuable.

(The views of two different students on course evaluation forms!)

The case method of teaching has a long history in business education. Made famous by Harvard University’s business school, it is now a technique widely used to help students apply business theories to “real” problems. Most business textbooks include cases, usually short vignettes, about a problem confronted by an actual company. Students are given a set of facts about a company or an incident and asked to identify parties to the decision, alternative solutions to the problem, and the pros and cons of adopting each of those alternatives.

Cases in books, however, become dated, and the information presented is sometimes too simplistic to give an accurate picture of the situation (Richardson & Ginter, 1998). Solutions may be passed from one generation of students to the next, alternative plans for the problem, and the pros and cons of adopting each of those alternatives.

For these reasons, business professors also have a tradition of using “live cases” in which students act as consultants to real companies to solve problems. Live cases are more timely, and often more stimulating, because they involve problems with local firms (Franz & Klein, 1996). For the most part, such consulting opportunities are included in senior year or MBA courses and involve profit-making concerns. Because of their experience with the live case model, business professors are good prospects to incorporate service-learning in their courses by doing live cases with not-for-profits.

When the live case method is used in a course, students are asked to work with an off-campus organization to analyze a situation, develop alternative solutions, and make recommendations from among those alternatives. The students may develop a market analysis to design an advertising campaign, an overview of a company’s competitive status, or a plan for a particular function such as human resources or sales. Limerick & Moore (1991), using this method in an Organizational Development course, advocate the use of live cases as a way to increase student awareness of the human subtleties in organizations. Learned (1991) and Richardson and Ginter (1998) describe the use of student teams to develop strategic plans for businesses. Bloomfield and Paschke (1997) and White and Usry (1998) explain how they structure student consulting projects in, respectively, international feasibility studies and quality assessments. Present in these articles are two overriding themes: the company with which students work gains because it receives faculty-supervised consulting work, and students gain because they can apply the classroom theory to an actual problem.

All of the authors previously cited use for-profit concerns, although they utilize different approaches for implementing the live case model. Some business programs establish offices to solicit proposals from companies that want this assistance, and some develop on-going relationships with a few companies and cycle various classes through them. Others
simply allow or encourage individual instructors to develop their own contacts with companies. For reasons of both tradition and access, faculty who use examples of profit-making entities in their teaching and work with for-profits as consultants will also tend to use those organizations for student experiences. There are, however, potential sites other than businesses for this same type of learning experience: namely, not-for-profit groups.

Where service-learning is discussed in the business literature, the articles follow one of two tracks—theoretical motivations for including it in the business school curriculum, or descriptions of service-learning projects. In the first group are articles by Zlotkowski (1996), Fleckenstein (1997), Tucker, McCarthy, Hoxmeier, and Lenk (1998), and McCarthy and Tucker (1999) which discuss the justification for and benefits from this type of learning experience. The second track—descriptions of projects—was the topic of an entire issue (January 1996) of the Journal of Business Ethics devoted to “Community Involvement and Service Learning Projects,” and included descriptions of programs at nine schools.

Categorizing the project by the typology of Easterling and Rudell (1997), one of those projects was an “internship” where individual students worked as interns. In four of the projects, the students worked as “volunteers.” Four used class-wide projects where the students acted as “consultants.” Of the consulting projects, two involved students acting as spokespeople for the groups, either lobbying or setting up outside contacts. The other two were more typical live case consulting projects. The program at Loyola involved students in an MBA course who wrote business plans for inner-city firms, while the program at Bentley involved long-term partnerships between the business school and social service agencies (Collins, 1996).

The projects upon which this paper is based used a variation on the consulting model. This variation—the consulting service project as a semester-long, group effort—lends itself to use in a variety of courses, and provides a rich learning opportunity for students. It combines the methodology of live cases, with which business professors are familiar, with the methodology of service-learning. Building the important, but unfamiliar, component of reflection into a structure that business professors know well enhances the likelihood that service-learning will be an attractive option for courses such as Consumer Behavior, Marketing Research, Introductory Marketing and Management, and Human Resource Management.

As used in most business schools, the live case model has two primary characteristics: first, students working on an actual, real-time problem faced by an organization, and second, a team-based structure. Students work in teams on these projects because of the magnitude of the typical question organizations usually need to have answered, the lack of student experience in solving such puzzles, and the obvious constraints on student time. Working in teams allows students to share ideas as well as to divide the workload. Numerous studies have shown that students learn more when they learn collaboratively (cf. Thomchick, 1997). Since the ability to work in teams will be useful for students in their future employment, faculty make group projects part of their live case courses.

The team-based structure of the live case model is readily adaptable to the consulting service project approach. What needs to be added are opportunities for students to reflect on issues they encounter and on the personal significance of their experience. Business professors will require assistance in incorporating this strategy into their classes, since it is different from the type of case debriefing that is typically used in a business course.

This paper draws on three years of experience in using consulting service projects in a variety of business courses. Its first goal is to provide, both to community service coordinators and to business educators, examples of live, service-learning cases that might be undertaken in management and marketing courses. Perhaps more important, however, is its second goal: to give an account of potential problems and how they can be avoided. The aim here is to make it possible for community service coordinators to promote these projects to business professors with confidence.

Examples of Actual Projects

The projects were undertaken at a small public liberal arts college located in a rural area where, although students have many opportunities to serve in the larger community through dozens of student-led clubs, student service was seldom connected to courses. One of the goals in these courses was to change the notion that service is separate from learning. The instructor’s other objectives were:

1. Have students learn theory by applying business concepts to the needs of several not-for-profit agencies in the local community, i.e., applied learning as service,
2. Give students experience with a project requiring extended teamwork, and
3. Integrate students into the larger community so that they can learn from it.

All of these goals can be met by integrating a long-
term, team-based, service-learning consulting project into the course itself. Since the institution lacked the infrastructure to adopt the entire Bentley model as described by Kenworthy (1996)—we had neither long-established contacts for consulting opportunities nor the necessary faculty experience—a modified Bentley model was used.

Over a period of three years, service-learning consulting projects were integrated in marketing and management courses. One class each semester participated in these projects, primarily due to faculty time constraints. Between four and six projects with different community agencies were undertaken within each class. During the three years, over 150 students—sophomores, juniors, and seniors—took part in one or more classes with a service-learning component.

Marketing Course Examples

The projects for Introductory, Consumer Behavior, Marketing Research, and Political and Social Marketing courses consisted of developing marketing strategies and campaigns that would help an agency define its market niche and better reach its intended audience. The agencies selected differed greatly in their clientele, funding sources, and levels of visibility in the county. Examples of placements included:

Agency A: works with developmentally handicapped adults. Needed greater recognition and response from local businesses that could (but did not) employ their clients.

Agency B: provides doctors’ visits and low-cost prescriptions to the working poor. Needed strategies to improve fundraising, and to raise visibility for potential clients, medical personnel, and donors.

Agency C: offers a range of services to low-income parents of very young children. Needed help reaching prospective clients, particularly for a literacy program.

Agency D: handles recycling for an area (governmental). Needed help in promoting a Recycling Day.

Agency E: runs a gathering place for youth. Needed help in expanding to a younger market segment.

Management Course Examples

Introductory Management and Human Resources Management students developed employee programs for various agencies.

Agency I: provides social services counseling (governmental). Needed a motivational program to inspire burned-out employees.

Agency J: operates group homes for handicapped adults. Needed to change its application form to meet current hiring laws.

Agency K: an educational and living history museum. Needed to redefine job descriptions for contractual employees and for volunteer staff.

Agency L: works with families of terminally ill patients. Wanted to increase volunteer participation by college students.

The projects selected for an individual course matched the learning outcomes for the course—projects for Marketing Research all involved conducting surveys for the agencies, Human Resources projects involved incorporating legal issues of personnel management, and so on. Student recommendations to the agency at the conclusion of the projects ranged from the sublimely obvious (have a larger sign to make your offices easier to find) to the potentially explosive (staff members are incompetent, and consider the racial composition of the community when replacing them). Everyone involved learned as we worked through to the final presentations and recommendations, including what to do differently next time.

The Administrative Tasks in Live Service-Learning Cases

Not-for-profit groups can benefit from the consulting work done by students, perhaps even more than for-profit companies. Often understaffed and underfunded, these agencies may welcome new ideas brought by student groups that have been given the task of analyzing their organization and developing plans to improve its functions. The interplay of the students and agencies, situated within the context of a business course that is extended to meet the objectives of service-learning, must be carefully orchestrated to maximize the benefit for all concerned. That requires particular attention to the administrative roles in these projects. The college’s community service coordinator and the course instructor must help the students and the agencies work together to provide the agencies with a productive report and to provide the students with a solid learning experience.

Role of the Service Coordinator

The service coordinator for volunteer projects, service-learning, or field studies provides knowledge of the larger community, agency contacts, and administrative support. This reduces the time an instructor must invest to develop and implement this course model. In addition to suggesting a short list of agencies with needs relevant to a particular course, the coordinator can provide the instructor with information about staffing, political or other pressures, and how a particular agency has worked with student interns or volunteer groups in the past. By mak-
ing preliminary inquiries about each agency’s interest in working with students in a course-based consulting effort, the coordinator prepares the way for the instructor to select her cases quickly.

The coordinator also encourages, and helps the instructor build into the course, the critical component of service-learning with which the business educator is typically unfamiliar—reflection. These opportunities for students to reflect on issues they encounter and on the personal significance of their experience are particularly important when a consulting project is not as successful as might have been hoped. All students, and especially those in introductory courses, typically need more assistance in developing what Cone and Harris (1996, p. 40) refer to as a “meta-perspective” on their own experiences than might be expected. Campus workshops, for faculty interested in this live case service-learning, would be helpful preparation, and the service coordinator should also support and monitor the instructor as she learns to use reflection as a tool in classes incorporating service-learning. After the final report is given, the service coordinator should also help facilitate discussions with the students about their experience in the community.

The service coordinator obviously has a vested interest in the success of these consulting efforts. Bad matches, failed collaborations, patronizing reports, or inappropriate recommendations would deprive the not-for-profit of the help it needs and could also jeopardize future opportunities for students to work and learn there. To aid the students in developing what Cone and Harris (1996, p. 40) refer to as a “meta-perspective” on their own experiences than might be expected. Campus workshops, for faculty interested in this live case service-learning, would be helpful preparation, and the service coordinator should also support and monitor the instructor as she learns to use reflection as a tool in classes incorporating service-learning. After the final report is given, the service coordinator should also help facilitate discussions with the students about their experience in the community.

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The most important ingredient in the successful implementation of a live case is coordinated communication. This communication must occur between the instructor and the coordinator, the instructor and the agency, the instructor and the students, and the students and the agency. The course instructor must support and encourage such communication throughout the process if the project is to be successful.

Well before the semester starts, the instructor needs to set objectives for the course and decide what type of projects might be suitable to meet those objectives. Then the instructor must communicate those ideas to the community service office which can then put together a list of agencies and make preliminary contact with those agencies whose needs might match the focus of the course. The community service coordinator pre-screens the agencies to determine their current needs, as well as determines their level of interest and ability to work with the students at that time.

The instructor then makes appointments to interview the contact person at each agency to (1) determine whether an agency’s project would fit the learning objectives for the course, (2) discuss the pros and cons of student involvement with the agency, and (3) secure commitment of staff availability to the students throughout the semester. Instructors need to explain how much time they will devote to informing the students about current problems and conditions at the agency. They also must explain the limits of students’ skills. This is particularly important; students are not professional consultants who can solve all problems, they have a limited amount of time to spend on the project, and they are not experts—they are college students taking a course in this topic.

Once the instructor has selected the agencies, she invites them to a class meeting to present information about their work, and pose the projects needing students’ attention. The students submit their preferences, and the instructor assembles the requisite number of agency teams, which can vary in size based on the scope of the projects.

Each student team then meets with its agency, usually on-site, to further define the project. The teams are responsible for providing the instructor with a schedule of tasks (gathering material from other similar agencies, looking at the literature, etc.) and a time line. The instructor talks with each agency to be sure that there is agreement between the students’ understanding of the task and their plan of action. It is at this point that the written agreement between the student team and the agency, detailed in the “Lessons Learned” section below, should be generated.

The student teams then go to work. Given the competing demands for their time, it is wise to build in some structure for progress reports and feedback. The instructor meets with each team for fifteen to twenty minute meetings every two to three weeks to help keep them on task, and to alert the instructor to any problems encountered—with the agency, in gathering information, or in working together. In these meetings, the instructor acts as a consultant to the groups, asking such questions as, “Have you considered X?” or “Have you looked at this similar organization for ideas?” In some courses, this consulting could be done in class to enable each team to benefit from suggestions made to the other teams.

Each team must also meet with its agency at least three times during the semester. Without these meet-
ings, a team might develop proposals that an agency would not or could not adopt. Without encouragement from the instructor, students may avoid meetings because they are reluctant to interrupt or impose on the agency—even though such consultation is part of the process.

At the end of the semester, each team makes a live, computer-assisted, formal presentation of its findings to the class, the instructor, the service coordinator, and the agency. It also submits a written summary of its work, conclusions, and proposal. Both the instructor and the agency evaluate the final presentation and written report. While it is important that the students properly apply theories to the situation, it is also important that they develop a workable plan for the agency—and only the agency can adequately assess the proposed plan. Making clear to the students from the beginning that this is a real situation and that the agency will critically evaluate their work helps them focus on practical, achievable solutions.

As business instructors already know, good communication is essential to a successful live case project; the same is true for a consulting service project. One of the learning outcomes of these projects is that they can help students increase their communication skills through practice and feedback mechanisms. As observed by Tucker, Hoxmeier, and Lent (1998), students can increase their presentation and cross-cultural communication skills as they listen to agency staff and talk with a variety of people beyond the campus. Students must also prepare an effective final report in which they make recommendations that the agency and the instructor must readily understand. “Dry runs”—rehearsals before classmates—allow for feedback by the instructor and peers. The increased opportunities to communicate with providers and recipients of services, and the feedback from fellow students, the instructor, and the agency, provide a rich environment in which to improve oral and written communications.

Figure 1 gives a suggested schedule for a consulting service-learning project in a fifteen-week semester. Distributing this or a similar timetable to the participating agencies, as well as to the students, will assist in keeping everyone on task.

**Participants’ Perceptions**

As the introductory quotations demonstrate, there are no guarantees about student perceptions of the value of service-learning projects. Limerick and Moore (1991) also discuss some of the variability in students’ perceptions toward these projects. Thus it is important that all participants understand the pros and cons so they are prepared to address problems that may arise.

From the perspective of the business professor, using live cases for learning has two major advantages: it brings theory to life as students have the opportunity to develop an end product in the form of a final report to an outside organization, and the students see the impact of organizational dynamics on the agency/company. Zlotkowski (1996) contends that “by developing curricular projects linked to community needs, faculty can further their students’ technical skills while helping them simultaneously develop greater inter-personal, inter-cultural skills and ethical sensitivity” (p. 5).

Business professors may be hesitant about working with not-for-profits either because they worry

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**FIGURE 1**

*Schedule for a 15 Week Semester Involving Service-Learning Consulting with Non-Profits*

<table>
<thead>
<tr>
<th>Week</th>
<th>Task</th>
<th>Parties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-semester</td>
<td>Identify Course Outcomes, and Selected Agencies</td>
<td>Instructor, Coordinator, Agency</td>
</tr>
<tr>
<td>2</td>
<td>Presentations to Class</td>
<td>Agency speakers</td>
</tr>
<tr>
<td>3</td>
<td>Teams formed</td>
<td>Students, Instructor</td>
</tr>
<tr>
<td>4</td>
<td>Meet with Agency</td>
<td>Agency, Students</td>
</tr>
<tr>
<td>5</td>
<td>Research</td>
<td>Students</td>
</tr>
<tr>
<td>6</td>
<td>Progress report</td>
<td>Students → Instructor</td>
</tr>
<tr>
<td>7</td>
<td>Research</td>
<td>Students</td>
</tr>
<tr>
<td>8</td>
<td>Meet with Agency</td>
<td>Agency, Students, Instructor</td>
</tr>
<tr>
<td>9 &amp; 10</td>
<td>Research</td>
<td>Students</td>
</tr>
<tr>
<td>11</td>
<td>Progress report</td>
<td>Students → Instructor</td>
</tr>
<tr>
<td>12</td>
<td>Meet with Agency</td>
<td>Agency, Students</td>
</tr>
<tr>
<td>13</td>
<td>Draft presentations (“dry runs”)</td>
<td>Students, Instructor</td>
</tr>
<tr>
<td>14</td>
<td>Presentations</td>
<td>Students, Agency, Instructor, Coordinator</td>
</tr>
<tr>
<td>15</td>
<td>Reflection</td>
<td>Students, Instructor, Coordinator</td>
</tr>
</tbody>
</table>
that staff members who are in the “helping professions” may be less demanding of students than “hard-headed business people,” or because they know that some agencies depend heavily on volunteer staff who might not provide the continuity needed for adequate structure and supervision. Experience shows that these concerns can largely be overcome by thoughtful choice of agencies and good communication with all involved. Agencies, too, may have mixed feelings about these projects, which offer the positive outcome of consulting help but require an additional time commitment. Agencies must evaluate whether the cost of the involvement is worth the anticipated benefits.

From the students’ perspective, there are pros and cons to service-learning, although student concerns focus on the methodology rather than on the agency. Easterling and Rudell (1997) report that students were concerned about working in groups, transportation to sites, and their own limited abilities. Students may also have concerns about how much extra time they must commit to the project, since they must make time for a full semester of contact with an agency.

For most students, such worries disappear as the semester progresses, and are replaced with positive reactions. Students who participated in the projects reported that they were helpful in refocusing educational or career goals. Some said the service field experience helped them get a job because during interviews they could discuss what they did and learned, and what the issues were in a real work situation. Furthermore, the live case model in service-learning is reciprocal—in return for the chance to learn from the people with whom they work and to apply theory to real problems, students help agencies that cannot afford to hire professional consultants. Adding service to experience, and reflection to both, makes for learning that is more readily retained beyond the end of the semester.

Lessons Learned

Not all the projects undertaken during the three years were successful. During the six semesters, four projects were “failures.” Sometimes students failed to give workable solutions to the agencies; sometimes agencies failed to communicate their needs and constraints to the students. The importance of reflection to a successful service-learning experience was highlighted by the less-successful projects. When projects did not work smoothly, students needed support from the instructor in working through the difficulties and learning from them. Students can learn much from a project that does not go well—but only if they are helped to learn from these less successful attempts.

As mentioned earlier, student scheduling and time commitment were major issues. Since long-term projects can be delayed easily in favor of more immediate assignments, student procrastination sometimes resulted in a lack of communication with the agencies, and, this in the end, led to an inadequate amount of information for the students’ final recommendations. The regular progress reports included in the sample schedule were added for exactly this reason. Admittedly, students still procrastinated and sometimes only contacted their agencies the day before such reports were due, but late contact was clearly much better than none.

Lack of communication by agencies was also a problem. Some agencies were simply too small to carve out adequate time from their overloaded schedules for working with students. While small agencies may desperately want help, they may not have the time to work with student teams. Careful screening of agencies by both the service coordinator and the instructor can help avoid this type of problem.

As mentioned above, experience strongly suggests that a service-learning consulting project needs a written agreement between an agency and its student team, specifying what is wanted and the proposed time line for meeting that need. In one instance, an agency changed its project during the semester, and although the students tried to meet the new project goals, they had insufficient time to do so. Clarifying and putting in writing all major points at the start of the project helps both the agency and the students maintain their focus during the semester.

It may be difficult to make reflection work well in these courses. Students in introductory classes may require a great deal of assistance in order to think critically about issues involving multiple constituents and tasks. Further, unless prompted, students may not willingly consider the significance of their off-campus work. Although it occupies the same structural position in the syllabus, service-learning reflection differs from the traditional case debriefing in a business course. The latter primarily involves action items—that the organization actually did or what other options could have been considered. It does not focus on ethical and civic issues and on the significance of what the students learned, which are central to reflection (Rama & Zlotkowski, 1996). Thus, as mentioned earlier, business instructors will require assistance in using this new pedagogical strategy in their classes.

As Cone and Harris (1996, p. 40) point out, …as educators, the outcome of our work should not [only] be how much service our students have done, how well they have done that service, or how good they feel about their role
in the community. We should judge our success upon the increased ability of students to engage in critical discourse at an abstract and conceptual level and to develop a 'meta-perspective' of their experience in the community.

Business educators will need suggestions about how to incorporate specific structures to help students achieve these objectives. Useful methods may include student reflection in journals (Kohls, 1996), final papers, progress reports, and/or guided discussion (perhaps facilitated by the service-learning coordinator). Such assignments and activities will encourage students to focus on the meaning of their experience.

Experience confirms the value of reflection—without it, students learned less than expected, even though their service itself was more than satisfactory. If it is to fulfill its potential, service-learning integrated into business courses, like any other type of service-learning, must be made a reciprocal process—not only do students give something of value to the community, but they also are asked to understand their experience within a larger context of meaning. It is not enough to write a good set of consultant’s recommendations for the agency.

Many business instructors who use service-learning in their courses have not conceptualized it as an evolution of the familiar live case. They formulate the service-learning component as an auxiliary activity rather than as a restructured live case to serve as the backbone of a course. This discussion of service-learning as an extension of the live case model should enable business faculty to reconceptualize service-learning as an integrated component of their courses. With the assistance of professionals accustomed to working with not-for-profits, and with a relatively modest investment in learning a new method of debriefing, business faculty can substantially benefit their students, not-for-profit agencies, and the community.

Note

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References


Author

SUSAN HAYES GODAR has a Ph.D. in International Business from Temple University. Prior to joining the faculty as an Associate Professor at William Paterson University, she taught for five years at St. Mary’s College of Maryland.