From Classroom to Client: Case Studies in Counselor Education

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Abstract

Experiential instructional strategies, such as case studies, actively engage students more than traditional, lecture-based teaching methods. Case studies promote critical thinking and can propel students' knowledge from theoretical concepts to applied skills with multiple populations and settings. Research findings support the use of case studies in various professional fields; however, examples in counseling education literature are limited. This article provides the rationale for using case studies in counselor education, diversity and ethical considerations, an example for application in cross-cultural and ethics courses, resources for creating case studies, and ways to assess the effectiveness of using case studies and student learning.

From Classroom to Client: Case Studies in Counselor Education

Counselor educators and supervisors are tasked with providing effective and engaging learning opportunities that enable students to demonstrate their knowledge and mastery of counseling concepts and skills. One pedagogical method in achieving this is with case-based learning. Historically, case studies have been used in higher education for over 100 years, and especially used in academic disciplines that include field experiences such as medicine, business, and teacher education (Farashahi & Tajeddin, 2018; Orr & Weekley, 2019); however, in counselor education, examples and instructions on the use of case studies are limited. Wilkinson (2024) expressed a call to action for the counseling profession to publish more case studies, stating that as a profession "defined and supported by our active practitioners" (p. 17), we must grow the literature of case studies accessible to practicing counselors. Gibbons and Barrio Minton (2024) answered this call by editing an entire textbook of relevant case studies in counselor education and aligned such case studies with 2024 CACREP standards. We support

this call and add the need for counselor educators to have access to more case studies for use in

classroom settings that promote inclusivity and are effective across counseling specialty tracks

(e.g., clinical mental health counseling, school counseling, etc.).

Case studies are a creative and effective way to propel students' knowledge of theoretical

concepts to applied clinical skills with various populations and settings. By definition, case

studies are an experiential instructional strategy that provide depth and breadth of a topic by

using complex, real-life scenarios and dilemmas for students to apply theory to practice (Erikson

et al., 2020; Farashahi & Tajeddin, 2018; Nkhoma et al., 2017; Orr & Weekly, 2019; Powell et

al., 2014; Tardi, 2019). Using case studies as an instructional strategy can both push students out

of their comfort zone and support their professional development (Erikson et al., 2020). When

case studies are used in a safe and structured classroom environment, students can take risks as

they integrate their understanding of concepts and application skills, while also increasing

communication skills and team building with peers (Farashahi & Tajeddin, 2018).

The use of case studies has been connected to students achieving higher levels of

cognitive processing skills, such as those seen in the higher levels of Bloom's revised taxonomy

of learning (Orr & Weekley, 2019; Peters, 2019). Bloom's revised taxonomy (Krathol, 2010;

Zhang et al., 2023) is a hierarchy of learning that begins with the *Remember* level, where

students must recall memorized course materials. Next, the *Understand* level involves students

constructing meaning from course materials (i.e., interpretations, summarizations, comparisons,

etc.). These first two levels are consistent with a teacher-centered style, whereas the upper levels

shift to a learner-centered approach to education (Moate & Cox, 2015). In revised Bloom's *Apply*

level, students must implement what they have learned in a new situation, such as through a class

presentation. At the *Analyze* level, students must be able to differentiate concepts and how they

relate to one another, which could be seen with the use of a simple case study and creating a chart or graphic of sample clients (e.g., using a genogram or ecomap to identify members of a family). In the next level, *Evaluate*, students learn how to critique criteria and make preliminary judgments (e.g., developing a possible diagnosis from identified symptoms listed in a case study). In the final level, *Create*, students synthesize their learning and create a new construct or form a plan, such as creating an effective treatment plan after analyzing and conceptualizing various components in a case study (Krathol, 2010; Nkhoma et al., 2017; Zhang et al., 2023).

Case study methodology is consistent with the learner-centered approach in counselor education advocated by Moate and Cox (2015). In learner-centered education, learning is recognized as multidimensional and social. Instructors downplay the power differential with students and work to create positive learning environments and facilitate supportive relationships. Students enhance their ability to embrace the inherent ambiguities that are central to the counseling process. They develop natural reflection on their evolving clinical and conceptualization skills. Instructors and students together co-create knowledge. Wilkinson et al. (2020) supported case study methodology as grounded in the constructivist approach to learning, which invites the cognitive complexity necessary for effective counseling practice, including increased awareness of multiple perspectives, open-mindedness, multicultural awareness, and professional self-awareness. Examples of this include Frick et al. (2017) and Nittoli and Guiffrida (2018) each highlighting specific use of case studies with films as effective tools for developing counseling students' cultural awareness, and Henderson and Malone's (2012) use of fairy tales as case studies in an ethics course to assist students in moving from theory to practice, getting familiar with specific codes of ethics, and assessing ethics violations.

Literature Review and the Gap in Counselor Education

Anecdotal evidence exists regarding the effectiveness of using case studies as an instructional strategy. For example, students are reported as expressing enjoyment of the educational use of case studies (Erikson et al., 2020). Ametrano (2014) relayed student reports of the helpfulness of case studies in learning counseling ethics. Furthermore, students reported enjoyment of case studies as aiding their learning (Pérez et al., 2019).

Empirical evidence indicates students experienced high levels of engagement and interactivity with increased skills in critical thinking, problem-solving, deductive reasoning, and conceptualizing issues as they consider multiple perspectives with the use of case studies (Deering, 2018; Tardi, 2019; Zhang et al., 2023). Farashahi and Tajeddin (2018) conducted a study of undergraduate and graduate business students' perceptions of learning by using three teaching methods: simulation, case study, and lecture, and found simulation and case studies were more effective than lectures for learning interpersonal skills, self-awareness, and problem-solving skills. In engineering education, Zhang et al. (2023) found that students engaged in case-based learning reached higher levels of Blooms taxonomy and scored better on exams than students receiving traditional instruction. Using literary fiction as case study resulted in clinical psychology student reports of improved clinical training, theoretical understanding, and self-awareness (Erikson et al., 2020).

Specific to counselor education, anecdotal and empirical data is limited; however, Merlin-Knoblich and Camp (2018) presented a qualitative study in which students reported case studies as being beneficial to their learning. Further, Malott and colleagues (2014) emphasized that evidence-based teaching in counselor education should include creating effective learning environments and structuring intentional learning experiences, which we argue the use of case studies as instructional strategy accomplishes. We highlight the need in counselor education

literature to provide more instructions and examples of how to use case study strategies in counselor education effectively.

The instructional strategy of case studies centers the students in active engagement with the course material. Instructors can present various case studies throughout the semester (Levitt et al., 2019) and scaffold learning opportunities from simpler to more complex (Asakura et al., 2018; Nkhoma et al., 2017). Case studies can be used in an individual class session, as an independent student assignment, or as a culminating graduate program capstone assessment (Powell et al., 2014).

Case studies are often part of a broader strategy of the "flipped classroom." In nursing education, for example, using case studies promotes active-learning (Schlairet et al., 2014) and specifically when practiced in role-play, has been found to increase student self-reported knowledge of addressing the healthcare needs of LGBTQIA+ patients (Jordan, 2023). The literature presents a wide variety of the types of instructional formats that can center on case studies. For example, case studies can connect to individual or group assignments (Andersen & Schiano, 2014; Deering, 2018). Instructors may ask students to apply theoretical concepts to a specific case in crisis intervention (Deering, 2018) or ethical decision-making (Ametrano, 2014; Lamar & Kimbel, 2016; Levitt et al., 2019).

Case studies may be in written format that students read or receive through lecture, or they may be witnessed through films (Frick et al., 2017; Nittoli & Guiffrida, 2018) or live role-play (Levitt et al., 2019). The role-play may be scripted (Miller & Springer 2020) or even involve theater students or actors (Asakura et al., 2018). In turn, student responses to the presented case may be via written assignment, discussion, presentation, recorded conversations, or role-play response (Deering, 2018; Nkhoma et al., 2017). In role play, students are able to

assume a client's point of view, values, and emotions. Furthermore, students might alternate

roles or perspectives, being challenged to disagree with a position previously endorsed. In this

way, case studies can increase students' cultural humility and adaptability skills to meet clients

where they are.

Diversity and Ethical Considerations

The case study instructional strategy is rooted in the Multicultural Social Justice

Counseling Competencies (MSJCC; Ratts et al., 2016) in its focus on training counseling

students to increase their self-awareness (cultural values, beliefs, biases) and client worldview.

Additionally, the use of case studies in deliberate practice or role-plays provides students with an

opportunity to connect the awareness and knowledge domains of the MSJCC with the skills and

action domains.

Counselor education students practice culturally-appropriate counseling interventions via

case studies before real-world application in practicum and internship experiences. Through a

variety of client scenarios, case studies utilize all four quadrants of the MSJCC model with

intersections of privilege and marginalization of the student and case-study client. Through case

studies, students practice approaching issues of identity, power, privilege, and oppression and

their impact on the counseling relationship in the classroom setting before interaction with real-

world clients. Case studies are an opportunity to bring otherwise marginalized voices into the

classroom to promote students' cultural competence (Deering, 2018). As part of a case-study

activity, counselor educators can intentionally integrate the MSJCC as a deliberate frame to

conceptualize a case. This may come in the form of asking questions relevant to each domain of

the MSJCC. For example, having students inquire with the question "what bias do you bring to

this case?" before going into the application of other theories, maintains a multicultural and ethical orientation to providing client care.

As counselor educators, it is our responsibility to design and implement the educational environment of future counselors (American Counseling Association [ACA], 2014, F.7.a; Council for Accreditation of Counseling and Related Educational Programs [CACREP], 2024, BB). The ACA (2014) Code of Ethics requires counselor educators to infuse diversity throughout the curriculum (F.7.c.) and to teach strategies grounded in theory and evidence (F.7.h.). The Code of Ethics adds clarity specifically to the use of case examples in our courses. Code F.7.f. explicitly states that if we use real scenarios from clients, students, or supervisees as examples and illustrations of counseling concepts in our classrooms, we must have the client, student, or supervisee review and approve the sharing of their information or we must substantially modify the content to alter any identifying information. Likewise, Tardi (2019) reminded faculty to protect the identity of any real persons connected to a classroom case study and that a mere pseudonym is not sufficient; we must protect the contextual information as well, a potential challenge when a given context may be exactly what makes a particular case compelling.

When using case studies as an instructional strategy in counselor education, we recognize how our beliefs, values, biases, and positionality influence case study creation and use. Faculty must regularly consult with colleagues, have professional peer reviews of our work, seek student feedback about instructional strategies, and remain open to adapting case studies based on feedback, and student engagement and performance. We recognize the impact case studies may have on students. For example, students may question if they have 'enough' information to fully assess a case scenario, which could imply self-doubt in decision-making skills, perfectionism in wanting the 'right' answer, and/or that we need to improve the information provided in the case

study. We also encourage students to share their lived experiences and worldviews to promote a safe and inclusive environment. While we support students' self-disclosure and sharing of their lived experiences, it is critical to manage the potential for tokenization of students from marginalized identities within the classroom space and the United States. The aim in deconstructing case studies through the lens of our own experiences is to model how to reflect on our initial reactions to situations critically and determine what is the most effective mode of action.

Resources for Case Study Creation

Powell et al. (2014) recommended using published case studies, however, like teacher education (Orr & Weekley, 2019), counselor education is a discipline with relatively few published case studies. We found one source with a complete case study by Levitt et al. (2015) focused on an ethical dilemma involving an unexpected non-professional interaction with a parent of a minor client. Though the article centered on the case presented to practicing counselors to assess their ethical reasoning, we also find the case appropriate for classroom use. Vignettes are another source of cases that may be utilized in the counseling classroom. For example, González-Rosario and Gibbons (2024) provide three case vignettes that may be used in the classroom when considering how best to support culturally and linguistically diverse students. Finally, the Gibbons and Barrio Minton (2024) text is a comprehensive source that can provide a rich number of case studies for use in the classroom setting.

Other sources for case studies include literature and film. For example, Erikson and colleagues (2020) suggested that fiction books can be an appropriate source for clinical psychology students because fiction often presents the complexity of human emotion as well as situations with no clear answer. Additional authors have suggested fiction, autobiographies, and

novelettes as sources for case studies (Deering, 2018; Erikson et al., 2020; Pérez et al., 2019). Henderson and Malone (2012) suggested using fairy tales and nursery rhymes as case lead-ins to discussion or role-play of ethical dilemmas. Similarly, popular films have been suggested as catalyst cases for teaching students about multicultural contexts (Frick et al., 2017; Nittoli & Guiffrida, 2018).

Because access to case studies in the counseling field is limited, it is advised that faculty write their own and publish cases (as we do here) to increase access to cases across the field (Orr & Weekley, 2019). As artificial intelligence (AI) evolves, counselor educators should also consider appropriate ways to use AI to assist with creating cases and include class discussions on what appears accurate in an AI-created case and what is missing due to AI's limitations in "understanding" the complexities of being human (Maurya & DeDiego, 2023). As noted, there is no singular method to engage students with self-created case studies. The instructor or student can individually prepare them, or they can be a group collaboration, allowing for unique cases. When time is limited or other classroom considerations are at the forefront, utilizing media, film, and possibly AI, to engage students to think critically can be beneficial.

Sample Case Study and Application

In keeping with calls for more published case studies (Orr & Weekley, 2019; Wilkinson, 2024), we present an original case study and sample classroom applications. While we envision this case could be used in a variety of CACREP core courses, we provide application to cross-cultural and ethics courses in particular.

The Case of Milan

You are counseling 14-year-old Milan (in an agency setting for Clinical and school settings for School). You and Milan have worked together weekly for three sessions now. You

know that Milan is part of a family that came to a North Carolina community from Serbia when Milan was a toddler. Milan's family includes Mom, who is the only legal guardian and is in and out of the family home with active addiction; younger sibling called Buddy, age 6; and maternal grandparents Milan calls Baka (grandmother) and Deda (grandfather). No mention of a father has come up in your sessions to date. Milan is fluently bilingual in Serbian and English and you know only Serbian is spoken in the home and that the grandparents do not speak English.

You and Milan have been establishing a relationship and Milan is open with you, sharing feelings of concern for and frustration about Mom as she comes and goes from home. Most recently, Mom has been gone for the last two sessions and Milan does not know where she is. Milan also shares with you an affection for Baka, who clearly plays the consistent parental role in Milan's life, but does, Milan says, "have a temper" and to avoid conflict, Milan tends to be agreeable at home and not share aspects of life that might upset Baka. "I'm not the typical teenager," Milan laughs, "I get along with Baka and Deda, and my mom when she's home." Milan also shares in the daily care for Buddy. To date, you feel good about your developing relationship with Milan. You are looking forward to today's session when you are planning to get specific about counseling goals moving forward. Milan has already expressed interest in processing feelings about being seen as "a little weird" by kids at school.

Today, however, presents an unexpected arrival. Here is Milan at your door with a woman you assume to be Baka. Milan looks at you with a non-verbal "Sorry" gesture as the woman begins speaking in a language you assume to be Serbian. Milan says, "This is my Baka. She says she does not give permission for counseling to continue."

Application

Students might individually reflect and/or write application papers on how to approach Milan and the grandmother. They might engage in small group or whole class discussions. We recommend a combination of individual and then group work as a method of illustrating the power of consultation – that as individual counselors, we are limited in our perspective and ideas but when we discuss the case, inevitably more perspectives and ideas emerge for how to approach Milan and the grandmother.

Cultural considerations related to the case of Milan are a natural area of discussion. Complexities surrounding immigration, addiction, family structure, language, and generation/age are included. Some students (and even some readers here) may not immediately realize the cultural category of gender identity also presented in the case – or rather, not presented. Milan and younger sibling Buddy have no clear gender identity, including no pronouns. In our experience, omitting reference to gender is an effective way to illustrate the power (and danger) of assumptions.

Counselor educators may open discussion and application of the case with a broad prompt such as "What bias or beliefs do you see impacting your initial thoughts and reactions about Milan and family?" Students might then apply the MSJCC (Ratts et al., 2016) to the Milan case with questions such as "What beliefs about the helping relationship, mental health, and counseling might exist for each of Milan, mother, and grandmother?" (client worldview) or "How might you need to adjust your language and communication to support Milan and family?" (counseling relationship).

Consistent with similar recommendations (Ametrano, 2014; Levitt et al., 2019), students might apply a specific ethical decision-making model (e.g., Forester-Miller & Davis, 2016) to the Milan case. The case provides the opportunity for students to reflect on ethical and legal

issues such as custody/guardianship and informed consent. Students can consider their immediate in-the-moment response to Milan and the grandmother, as well as a longer-term response to Milan and family. Furthermore, students may explore advocacy and/or school/agency policy implications related to the case.

<div align="center">**Evaluation and Assessment of Case Studies**</div>

While anecdotal and empirical evidence supports using case studies, and with the variety of creative ways to use cases, counselor educators are tasked with assessing their effectiveness. To evaluate this strategy, first confirm it meets course objectives and foundational curricular standards (i.e., CACREP, 2024, section 3). Be sure there is evidence of inclusivity and representation of cultural and intersectional identities (e.g., ability, age, ethnicity, gender, neurodiversity, race, sexuality, spirituality, etc.), and that the case is provided in an accessible format. Also, have professional counseling peers review case studies for quality, meeting learning objectives, and to eliminate implicit biases.

When assessing student learning, educators should identify specific competencies students are expected to successfully demonstrate, such as problem identification, case conceptualization and analysis, application of counseling concepts and skills related to the specific course (e.g., utilize a theoretical approach and techniques in a theories class), ethical and cultural considerations, and synthesis of research literature in relation to the case. Zhang et al. (2023) highlighted the need to include all six levels of Bloom's taxonomy when assessing student learning. In their study of graduate students in engineering, case-based instruction was linked to students' improved skills in specifically Bloom's levels of *Understanding*, *Applying*, and *Creating*, as compared to students receiving traditional textbook and lecture instruction (Zhang et al., 2023).

After identifying competencies, faculty are encouraged to create a rubric explaining what competencies will be assessed and a corresponding scoring system. A determination should be made in how students will demonstrate the competencies, such as with a written report, a paper with question prompts, individual or group presentations, reflective journals, quizzes, role-play demonstrations, or online asynchronous discussion boards. Educators may also consider using a scaffolded teaching approach with case studies and assess students' growth across cases and time. It is essential to provide formative, summative, and developmental "in the moment" feedback while students work on cases in class, and educators can also assess students' receptivity to and use of feedback. Finally, educators should seek student input about specific cases and case study instruction to assess their perceptions of learning, and then use students' constructive feedback to enhance future case studies.

Implications

The application of case studies within counselor education can help students bridge the gap between counseling theory and practice with opportunities to apply theoretical knowledge, develop clinical and analytical skills, broaden perspective from various angles, and increase cultural and ethical competence. This will lead to a more holistic understanding in meeting the unique needs of future clients.

Limitations

Limitations exist in case-based instruction. As noted, there is a dearth of published case studies, particularly in the counseling literature. Additionally, it is time-consuming for educators to independently develop cases (Orr & Weekley, 2019). Furthermore, it may be difficult to fully represent clients' backgrounds or complex issues, or replicate the emotional engagement experienced in counseling sessions. As such, we do not recommend using case studies as the sole

instructional strategy in counseling courses, rather, we propose combining them with other learning experiences, including live counseling, deliberate practice, or supervision sessions.

Future Directions

The use of case studies has been supported in various fields; however, limited research or examples exist in counselor education literature. Thus, we support Wilkinson's (2024) call for more case studies in the counseling literature. The counselor education field consists of practitioners who expound on their clinical experiences in the classroom, and we encourage them to share their case examples and strengthen counselor training across programs and disciplines. Future research can focus on the effectiveness of using case studies specific to counselor education, their impact on student learning outcomes, and add depth to counseling literature by using case studies that explore cultural intersectionality, sociocultural power differentials and oppression, and cultural relativism within ethical dilemmas. We also recommend creating discipline-specific cases (e.g., school counseling, clinical mental health counseling, etc.), cross-discipline cases (e.g., including more than one counseling specialty), and inter-disciplinary cases that broaden students' perceptions and skills when working with other behavioral health professionals, such as school personnel, social workers, and psychiatrists. Further, we encourage counselor educators to work together and share case studies across curriculum, perhaps building cross-curricular cases (e.g., examine a client case in multiple core courses), or use case studies as part of their comprehensive exams as another way to assess students' mastery of counseling concepts and skills. As counselor educators expand their practice and research on the use of case studies, students and the counseling field at large will benefit from the engaging and practical application of this experiential instructional strategy.

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