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JA Financial Literacy

Guiding Questions for Case-Based Learning

Case-based learning uses realistic scenarios to help students think critically and make decisions. The open-ended questions in this handout are *examples* designed to help you move the learning forward as students explore their choices and reasoning.

When Presenting a Case to Students:

Instead of Saying . . .	Say . . .	Example
Here's what you should know.	Here's a situation. What should you do?	You receive a tax refund; how could you decide whether to spend, save, or invest it?
Here's the correct process for handling a conflict.	Here's a situation. Two team members disagree on priorities. What would you do?	You and a family member disagree about how much to save for an upcoming expense. How could you decide what to do?
Here's the right way to create a budget.	Here's a situation. You've made a financial plan, but it's not working. What do you do?	You have a monthly budget, but unexpected expenses keep coming up. What could you do?

When Supporting Students As They Work Through a Case:

While each case has specific prompts and outcomes, these *example* questions can be used at any point to deepen discussion, prompt reflection, or support students as they work through a case. You don't need to ask all of them, or ask them in order. Use the ones that best fit the moment and your student group.

Understanding the Situation:

- What do you notice?
- What are the core issues here?
- What information is missing that would help clarify the situation?
- What assumptions are being made here?

Weighing the Options:

- What choices do they have?
- What are the pros and cons of each option?

- What constraints (income, time, budget, etc.) limit the decision?
- What's the short-term vs. long-term impact?

Deepening the Thinking:

- What evidence supports your thinking?
- How might this turn out differently?
- What would you do in their place?

Considering the Larger Impact:

- Who are the stakeholders and what might each want?
- What unintended consequences might occur?
- How do values or principles influence the options?
- If you were advising someone here, what would you recommend?
- How would you measure success in this scenario?

Follow Up Questions to Promote Discussion:

- What makes you say that?
- What would change your mind?
- What tradeoff are you accepting?
- What's your backup plan if it doesn't work?