

## CASE AND TEACHING NOTE SUBMISSION GUIDELINES

### CASE

#### Sources

Cases are based on real people, companies, and events. Disguised cases are accepted if the disguise is necessary and strong. Fictional cases will not be accepted. The three types of cases that Ivey accepts include:

Field-based: We prefer interview-based cases that have been released for general distribution by the subject organization (see the Consent to Use (release) form).

Published Sources: Appropriate and sufficient footnotes must be included (see Citation Guidelines). It is not legal to attribute statements, actions, feelings, etc., to actual persons or organization without their consent or a footnote containing the source.

General Experience: Based on the author's experience with a real organization. These cases should be disguised.

#### Tense

Cases are written in the past tense. Teaching notes can be written in the present or past tense.

#### Decision Point

The case introduction (paragraphs 1 to 2) must clearly outline the decision that has to be made in relation to the case dilemma. This provides the reader with a concise understanding of the challenge that will be examined in the case. The introduction must also include the relevant date and location in which the case is set. There should be no references in the case to dates or events that occurred after the time in which it is set.

#### Writing Quality

Files should be thoroughly proofread before submission in order to ensure grammatical and syntactical integrity.

#### Case Length/File Size

- Unit sales of cases drop off very quickly once the body of a case exceeds 8 pages. The total length, including exhibits, should not exceed 15 pages. The text should be in Times New Roman, 11 pt.
- Submit the case and teaching note separately as Word documents (.doc or .docx).
- Photographs significantly increase the electronic file size; use them only where necessary.

#### Important Notes

- The case title should be eight words or less and includes the company name followed by keywords.
- The first mention of a person in a case must include a given and family name. After first introduction, family name is appropriate.
- Country/region specific terms should not be used. For example, do not use *lakh* or *crore*.
- Slang or colloquial terms and expressions should be avoided.

## Permissions

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## Exhibits

- All tables, figures, appendices, etc., should be referred to as exhibits in the body of the case or teaching note and inserted at the end of the document.
- Exhibits should be of high resolution and in black and white.
- Spreadsheets and tables should be inserted into the file as editable objects, not as images.
- Label the x- and y-axes in graphs.
- Include a citation below each exhibit. State whether the exhibit is an original document extraction or a creation of the author using data from the original document (e.g., “Created by author using. . .”).

## TEACHING NOTE

### Layout

Ivey Teaching Notes should contain the following headers:

Synopsis: Summarize the case but refrain from copying and pasting direct material (1 to 2 paragraphs).

Learning Objectives: Usually only requires a paragraph or 3 to 5 bullet points.

Position in Course: Who is the intended audience (e.g., undergraduate, MBA/post-graduate)? In which courses could the case be used?

Relevant Readings: Provide 3 to 5 recommended readings that may be assigned along with the case. These should include any framework, theory, etc., used in the analysis.

Assignment Questions: Include 3 to 6 questions. These must match the headers for the Analysis section. All questions presented in the teaching note require an analysis/answer.

Teaching Plan: A simple table showing the time allocation for a class of a certain length can be included, or a more in-depth teaching walkthrough. Do not mix the Teaching Plan with the Analysis. A Board Plan can be provided as an exhibit. This is optional but highly recommended.

Analysis: Provide 3 to 5 pages containing each assignment question followed by its analysis/answer.

What Happened: Provide a brief summary of the events that followed. A focus on the decision that was actually made and its outcome is particularly useful here.

### Case and Teaching Note Examples

To access Ivey cases and teaching notes, register at [www.iveycases.com/login.aspx](http://www.iveycases.com/login.aspx). With appropriate qualifications, this will grant you free academic inspection status of our material.

### Questions?

Contact us at [publishcases@ivey.ca](mailto:publishcases@ivey.ca).