

GUIDELINES FOR SUBMISSION

The *Journal of Applied Case Research (JACR)* is a publication of the Southwest Case Research Association. *JACR* publishes teaching cases and critical incidents in all business disciplines. Cases may be grounded in primary and/or secondary data sources. Whether primary or secondary, sources must be well documented. Authors using primary data (i.e., data about internal operations obtained directly from that organization) must obtain written permission from the organization under study to be considered for publication. Although *JACR* will publish disguised cases, disguising a case by changing the organization's name does not remove the requirement for written permission to publish the data directly given by the organization under study. Fictitious works are not considered for publication.

Case submissions may be of two forms:

- ❑ Decision-based Case or Critical Incident: Presents data to which a student must apply theory to analyze the issue requiring resolution and to synthesize what actions should be taken.
- ❑ Description-based Case: Describes organizational actions that a student must evaluate using theory or models of best practice.

Files to be Submitted

All initial submissions are to contain two types of files:

1. Text documents in Microsoft Word that present the case and Teaching Note. These must be anonymous files.
2. A identifications group that contains the Title Page, the Synopsis page, and the Disclaimer and Declaration of Original Work. The Title Page and Synopsis are to be in Microsoft Word and submitted as either (.doc) or (.docx) files. The Authorization to Publish and the Declaration of Original Work are to contain original signatures and submitted as PDF files. Sample documents are available at the end of this document.
3. Prior to publication, on company letterhead a signed authorization to publish must be provided from the organization on which the case is based.

Submissions for publication consideration in *JACR* must adhere to the following guidelines:

- ❑ The title page must include the title of the case and appropriate contact information (authors' names, affiliations, complete mailing addresses, telephone numbers, and e-mail addresses).
- ❑ The case must not contain authors' names or any affiliation that would allow reviewers to determine authorship.
- ❑ Cases must be written in past tense.

- Text documents are to be formatted in strict conformance with the JACR Style Sheet. Format questions not addressed by the Style Sheet should conform to the APA Style Sheet.

Guidelines for Cases and Critical Incidents

Decision cases. Decision cases are distinguished by ending at a decision point. Usually this is a decision facing the central character in the case, the decision-maker. A strong opening paragraph, often referred to as “the hook”, should telegraph the decision scenario faced by the decision maker. No introductory paragraph is needed. Most often, decision cases are based on primary field research and are enriched by real characters and quotations, where appropriate. Beyond these basic conventions, the format of a decision case may vary based on the discipline, subject matter, and situation.

Descriptive cases. Descriptive cases are used to illustrate a broad scenario for organizational analysis. These cases must be based on real events and organizations but generally utilize secondary research where direct access to the organization is not available or may not be required. They are usually quite extensive and may blanket a broader timeframe than normally encompassed in a decision case. For example, a descriptive case might examine a CEO decision at SAP, while a descriptive case might explore the evolution of the ERP software industry from 1990 to 2010.

Critical incidents. Critical incidents are also decision-focused, so they should open with a hook and end at the decision point. The distinguishing features here are focus and length. Critical incidents are five pages or less, tightly focused on a very specific situation or decision, and intended to illustrate a singular teaching point. They are also real events, organizations, and characters.

In all circumstances, fictional work is forbidden.

Teaching Note Guidelines

Cases must be accompanied by a teaching note, serving as a manual for effective use of the teaching case. The teaching note must not contain authors’ names or any affiliation that would allow reviewers to determine authorship. Further, although not published, the teaching note must adhere to the following format:

- **Synopsis.** Begin with statements identifying the form of case (decision-based, critical incident, or description-based), the source of data (primary or secondary), and the presence of any disguises (names, locations, dates, numeric data, etc.). Then, briefly present the theme of the teaching case. The length of the synopsis should not exceed 300 words and should give enough information about the case that readers would be able to decide if the case might be appropriate for their courses. This identical summary is to be repeated in the text box on the Synopsis page.
- **Use & Objectives.** Begin by identifying the levels (undergraduate, graduate, executive) and the courses for which the case is most appropriate. Then, itemize

- the learning objectives that a student should achieve through study of the case. It is suggested that learning objectives be structured using Bloom's taxonomy.
- ❑ **Conceptual Foundations.** Explain the conceptual foundations (theory or model) on which the recommended analysis (found in the Q&A section of the teaching note) is grounded. Literature that would be helpful in understanding the conceptual foundations should be reviewed and cited as endnotes.
 - ❑ **Teaching Plan.** Provide guidance on how to most effectively achieve the learning objectives through assignments and discussion. Indicate if the case has been classroom tested and insights from that experience.
 - ❑ **Questions and Analysis.** List first the questions students are to address in the analysis. Next, repeat each question followed by a corresponding answer. The answer should be clearly developed in a full discussion for the benefit of adopting instructors. The primary intellectual contribution in case writing is found in this section of the teaching note. Use endnotes to cite published materials where appropriate. Develop tables and figures summarizing analytical methods or points. Label these Table – TN-1, 2, etc. or Figure – TN-1, 2, etc. Provide a descriptive title. In the text of the answers, if appropriate, specify where the data is found in the case (e.g. See Case Table 1). When possible, cite answers which would tend to identify the answers of "A" students.
 - ❑ **Epilogue.** Describe the events that follow the decision point at which the case ends. What were the decisions made and actions taken? What further effects have these decisions and actions rendered?
 - ❑ **Supplemental material.** Insert any additional pedagogical materials in this section. This would include articles that would allow the instructor to relate the overall focus of the case to the relevant discipline. This would also include pedagogical materials such as handouts or slides that would facilitate discussion.
 - ❑ **Endnotes.** References throughout the teaching note should be cited as endnotes. See Style Sheet for formatting.

Submission

Please submit cases, critical incidents and the associated teaching note via email attachment. Include authorizations, synopsis, and title page as separate documents. All submissions and related correspondence are to be directed to:

Joseph Kavanaugh
Editor, *Journal of Applied Case Research*
kavanaugh@shsu.edu

Disclaimer and Declaration of Original Work

I (We), the Author(s) requesting review of these submitted materials, by our signature(s) do affirm that

- The work is original, is not concurrently under review elsewhere, and has not been published or distributed in print or electronic media by another journal or textbook;
- The organization, people, and events on which the case is based are real (and, if relevant, disguises have been fully acknowledged in the teaching note);
- Every effort has been made to assure accuracy of the teaching case and teaching note;
- Ethical standards have been applied in the research and preparation of the work;
- Appropriate permissions have been obtained so that publication of the case would not violate any copyright or other personal or proprietary rights of others. Copyright holders have given written permission for the use of any material not permitted by the “Fair Use Doctrine”; and
- The host organization has signed a release authorizing the publication of all information gathered and contained in the material to be published.

Signature of Author

Date

Signature of Author

Date

Signature of Author

Date

**Sample of Authorization to Publish
(print on company letterhead)**

Date

Author Name
Department
College/University
Mailing Address

Dear:

I have read the case titled _____
by you (and names of additional authors) and I hereby authorize the use of this material at
(your college/university), and at other schools, companies, and organizations, in loose
page form or bound commercially, in published books, journals, or training materials, or
in electronically stored or produced media.

By my signature, I affirm that I am authorized by my company to grant such permission.

Sincerely,

(Signature for Company)
(Printed Name of Signer)
(Title of Signer)
(Address of Company)

SYNOPSIS OF CASE
Author Name(s) and Affiliation

Begin with statements identifying the form of case (decision-based, critical incident, or description-based), the source of data (primary or secondary), and the presence of any disguises (names, locations, dates, numeric data, etc.). Then, briefly present the theme of the teaching case. The length of the synopsis should not exceed 300 words and should give enough information about the case that readers would be able to decide if the case might be appropriate for their courses.

Keywords for Search. Provide up to six key words to assist prospective users to search for cases. Examples of key words might be discipline, subject, industry, issue analyzed, type of case, or instructional application. For example:

1. Strategic management
2. Industry analysis
3. Automotive industry
4. Strategic groups
5. Decision case
6. Competitive strategy.