

## CASE AND TEACHING NOTE SUBMISSION GUIDELINES

### Case Study 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. There are three types of cases that Ivey accepts:

**Field-Based:** Cases based on fieldwork, including interviews, internal company data, etc.; field-based submissions require a Consent to Use (release) form. When considering submissions, strong preference is given to field-based cases that have been released for general distribution by the subject organization.

**Published Sources:** Cases based on published information, requiring appropriate and sufficient footnotes (please see citation guidelines). Care must be taken to properly source statements, actions, feelings, etc. attributed to actual persons or organizations.

**General Experience:** Cases based on the author's first-hand experience with a real organization.

### Important Notes

- Priority will be given to submissions that detail online teaching strategies in addition to a regular teaching plan.
- The case title should be eight words or less and include 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.

### Disguised Cases

Upon submission, please disclose the real identity of a disguised company and any associated characters that appear in the case. This information will be kept confidential.

### Tense

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

### Decision Point

The case introduction 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

- It is highly recommended that the body of the case not exceed 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 Microsoft Word documents (.doc or .docx).

## 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.
- 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. . .").

## Artwork and Image Guidelines

- Images should be supplied in the highest quality possible, either directly in the document or supplied separately.
- If including an image separately, please add a placeholder note in the running text.
- It is important to provide images or artwork that are comprehensible in both colour and black and white. Please utilize distinctive patterns or other methods to ensure your exhibit is as accessible as possible.

## Permissions

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- Obtain written permission from the copyright holder before submission.
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Please note that the inclusion of third-party copyrighted material without permission could lead to significant delays in publication.

## Case and Teaching Note Examples

To access Ivey cases and teaching notes, register at <https://www.iveycases.com/RegisterUser.aspx> With appropriate qualifications, you will be granted academic status allowing free viewing of inspection copies.

## Questions?

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