

SUBMISSION GUIDELINES for CASES and TEACHING NOTES

Case Sources

Cases are based on real people, companies, and events. Fictional cases are not accepted. Ivey Publishing accepts the following types of cases:

Field: Cases based on fieldwork, interviews, and internal company data. Disguised cases are accepted if the disguise is necessary and strong. All field cases must be released for general distribution by the subject organization or protagonist by way of our [Consent-to-Use Form](#).

Published Sources: Cases based on published information, requiring appropriate and sufficient footnote citations (please see [Citation Guidelines](#)). Care must be taken to properly source statements, actions, and feelings attributed to actual persons or organizations.

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

Important Notes

- We do not accept cases when the dilemma occurred more than seven years ago.
- The case title should be no more than eight words and should include the company name followed by keywords.
- When first mentioned, a person in a case should be referred to by their full name (i.e., given name *and* family name). All subsequent references to that individual are by family name only.
- Slang or colloquial terms and expressions should be avoided.

Disguised Cases

Disguises can only be used for field cases. We do not accept disguised published sources 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. Disguised cases should be released for general distribution by the subject organization or protagonist by way of our Consent-to-Use Form.

Tense

Cases are written in the past tense. Past tense applies even to future propositions and truths (e.g., "the sky was blue" rather than "the sky is blue").

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

Decision Point

The case introduction must clearly outline the decision that needs to be made in relation to the case dilemma.

The decision point must be forward looking and allow readers to step into the shoes of the decision-maker to suggest a solution going forward. The introduction must also include the decision-point date as well as the location in which the case is set. There should be no references in the case to dates or events that occurred after the decision-point date.

The case decision point and the teaching note's learning objectives and assignment questions must all align and share the same focus and dilemma.

Writing Quality

Files should be thoroughly proofread before submission to ensure grammatical and syntactic integrity.

Case Length

- The body of the case should not exceed 8 pages. The total length, including exhibits, should not exceed 15 pages. The text should be in 11-point Times New Roman font.
- Submit the case and teaching note separately as Microsoft Word documents (.doc or .docx).

Exhibits

- All tables, figures, and appendices should be referred to as exhibits in the body of the case or teaching note. Exhibits should be inserted at the end of the document.
- Spreadsheets and tables should be inserted into the file as editable objects, not as images.
- In graphs, both the x (horizontal) and the y (vertical) axes should be labelled.
- Include a citation below each exhibit. State whether the exhibit has been extracted from an original document or created by the author using data from an original document (e.g., "Created by the author using. . .").

Artwork and Images Guidelines

- We will not accept copyright-protected images as exhibits without express written permission from the copyright holder.
- Images should be supplied in the highest quality possible, either directly in the document or separately.
- If including an image separately, please add a placeholder note in the running text.
- Provide artwork and images that are comprehensible in both colour and in black and white. Please utilize distinctive black-and-white fill patterns (e.g., stripes, spots, etc.) in charts to ensure your exhibit is as accessible as possible.

Permissions

To reproduce copyrighted material, such as artwork, images, figures, or large quotations, authors must do the following:

- Obtain written permission from the copyright holder before submission.
- Provide a proof-of-consent statement or licence from the copyright holder.
- Include an appropriate acknowledgement; a copyright line may be added if requested by the rights holder.

Please note that the inclusion of third-party copyrighted material without permission could lead to significant delays in publication.

Teaching Note

- Please use our [teaching-note layout](#)
- In addition to a regular teaching plan, please provide online teaching strategies.
- In your analysis, please include the following:
 - The most appropriate answer to the question, with support from the case.
 - Anticipated student responses that differ from the most appropriate answer, with support from the case.
 - Anticipated discussion among students.
 - Teaching tips to help the instructor facilitate classroom discussion.
- For cases that deal with sensitive issues or have strong equity, diversity, and inclusion themes, the teaching note must provide ample resources and guidance for instructors to navigate discussions in appropriate, productive, and safe ways.

Examples of Cases and Teaching Notes

Prior to submission, we encourage you to read through some of our cases and teaching notes. To access Ivey Publishing cases and teaching notes, register at <https://www.iveypublishing.ca/s/login/SelfRegister>. With appropriate qualifications, you will be granted academic status allowing free viewing of inspection copies.

Questions?

Contact us at publishcases@ivey.ca.