

The Journal of Applied Case Research (JACR)

Guidelines for Submission

The *Journal of Applied Case Research (JACR)* is a publication of the Southwest Case Research Association. The *Journal* accepts factually-based cases and critical incidents, as well as research and pedagogical articles about the case method and teaching. All cases and critical incidents must be based on real events, with information gathered through primary or secondary sources. Fictitious cases and critical studies are not considered for publication.

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.

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 with all author identification information removed from the document properties.
2. A separate identification document that contains: Title Page, Synopsis page, and the Disclaimer and Declaration of Original Work. The Title Page and Synopsis are to be in Microsoft Word and submitted as a (.doc) file. The Declaration of Original Work page and the Authorization to Publish page are to contain original signatures and be submitted as PDF files. Samples are provided below.

Prior to publication, the signed Authorization to Publish, *on company letterhead*, must be provided by the organization on which the case is based.

Guidelines for Cases and Critical Incidents

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

- Title page must include the title of the case and appropriate contact information (authors' names, affiliations, telephone numbers, and e-mail addresses).
- The remainder of the case must **not** contain name(s) of author(s), or any affiliation that would allow reviewers to determine authorship.
- Cases are to be written in the past tense.
- Documents are to be formatted in strict conformity with the JACR Style Sheet. Format questions not addressed by the Style Sheet should conform to the APA Style Sheet.

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.

Critical incidents. Critical incidents are also decision-focused, so they should open with a hook and end at the decision point. Critical Incidents are different from cases in terms of focus and length. Critical incidents are five pages or less, tightly focused on a specific situation or decision, and intended to illustrate a singular teaching point. They must also depict real events, organizations, and persons (even if disguised). In all circumstances, fictional work is forbidden.

Teaching Note Guidelines

Cases must be accompanied by a teaching note that serves as an instructor's guide for effective use of the teaching case. The teaching note must not contain the name(s) of the author(s) or any affiliation that would allow reviewers to determine authorship. 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 synopsis should not exceed 300 words but 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 and Objectives.** Begin by identifying the appropriate level(s) (undergraduate, graduate, executive) and courses for the case. Then, list the learning objectives a

student should achieve through study of the case. Learning objectives should be structured using Bloom's taxonomy.

- **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. Use endnotes to cite published materials where appropriate. Label any Tables as TN-1, 2, etc. or Figure as FN-1, 2, etc. Provide a descriptive title for every Table and Figure included. In the text of the answers, if appropriate, specify where the data is found in the case (e.g., See Case Table 1).
- **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

Submit via email attachments. Include authorizations, synopsis, and title page as separate documents. All submissions and related correspondence are to be directed to:

David W. Whitlock, Editor
Journal of Applied Case Research
dwhitlock@SE.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 submitted is original, 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.
- All appropriate 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, 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.”
- 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
Printed on Company Letterhead**

Date

Lead Case Author Name
Position
Mailing Address

Dear (Lead Author Name):

I have read the case titled *Name of your Case* and authorize the use of this material for instructional purposes, and possible publication in schools, organizations, in published books, journals, or training materials, including electronically stored or produced media.

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

Sincerely,
(Signature)

Printed Name of Signer
Title of Signer
Address of Company

CASE SYNOPSIS

Author Name(s) and Affiliation(s)

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 but provide enough information about the case that readers would be able to decide if the case is appropriate for their courses.

Keywords for Search. Provide up to six key words or phrases to assist prospective users to search for cases. Key words may 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.