

Case submission guidelines



The Case Centre is unique in offering an efficient worldwide case distribution service to both institutions and individual authors across the globe.

We take very seriously our duty of care to all those who order from us. This includes a responsibility to ensure that the teaching materials in our collection are of the highest quality.

Authors and their organisations are required to certify that their case and accompanying materials meet professional quality standards and have been authored in an ethical manner.

This guide provides all the information you need to know before submitting your case to us.

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Why submit to The Case Centre?



Our approach

Our authors are important to us and we aim to provide them with a friendly, efficient service. Here are the highlights of why you should submit your case to us.

Retaining copyright

Unlike many publishers, submitting a case to The Case Centre does not transfer copyright to us. We act simply as the agent of the copyright owner.

Publicity

Distributing through The Case Centre makes teachers, researchers and businesses worldwide aware of your materials. Our reach is truly global, in 2018 we distributed cases to 1,426 organisations in 94 countries.

Your case, its supplementary materials, and its details (abstract, topics etc.) will be included in our [online database](#). Authorised users can view an online preview copy of your case and we will undertake worldwide distribution of your teaching materials.

New cases are also included in our monthly email update service, which goes to over 43,500 subscribers worldwide. There are also opportunities to have your case featured on our website and in our newsletter, [Connect](#), that is sent to 52,000 subscribers six times a year.

Royalties

Organisations that are [members](#) of The Case Centre receive royalties on sales of multiple copies of cases and supplementary materials. Preview copies are not eligible for a royalty payment.

The royalty rate for all items is 28% of the sale value. Sales under our [Undergraduate Case Teaching Licence](#) attract a pro-rata royalty payment.

Access to sales and download data

Management data

Once your case has been submitted and is registered in our collection, you will have access to it in your online [product portfolio](#). From here you can run reports to see how many people have viewed a preview copy of it, and how many copies it has sold.

Impact

The data we provide can illustrate your case's impact, and form part of the documentation produced to support your school's accreditation process.

Dedicated team

Our friendly Content Acquisition Management team is always happy to support authors through the submission process.



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How to submit to The Case Centre



Submitting as an individual author

We recognise that not every school produces the volume of cases, or has the infrastructure necessary to establish a formal case collection.

Our user-friendly online case submission service enables individual authors to submit cases and other teaching materials to us with minimum fuss and maximum speed.

Once you have sent your submission to us you will be able to monitor its progress in your list of current online submissions. www.thecasecentre.org/OCS

We aim to have your case available in our online search database within 15 working days, but this may take longer in some circumstances.

To help you get started this guide explains our submission requirements.

If you have any questions check out our FAQs. www.thecasecentre.org/SubmissionFAQs

Submitting a collection

If your school is actively engaged in writing cases, has implemented a quality review process and has a central point of contact for your case collection, we'd love to discuss whether worldwide distribution via The Case Centre is possible.

The next step is easy – contact our Content Acquisition Management Team on content@thecasecentre.org or +44 (0)1234 756401 with full details of your collection and they'll advise you further.

"The Case Centre is a longtime distribution partner of ours, and it has done a tremendous job for Kellogg. As a global case distributor, it is professional, timely, flexible and creative. I would highly recommend it to any organisation looking to distribute cases worldwide."

Greg Merkley,
Director of Case
Publishing, Kellogg
School of Management

Submission requirements



Any items submitted to us that do not meet our submission requirements will be returned to the author for further work.

Everything you submit to us **must be your own original work**. If we discover that it is not, we are obliged to report it to the copyright owners, withdraw the material, and we reserve the right to not publish any future work you may produce.

Language

Your case, its teaching note and all metadata **must be provided in English**. Once you have done that, you can also submit translations of the case and its related items (e.g. teaching note) in other languages.

The written language of all items and metadata submitted to us **must be of the highest quality and meet the following quality guidelines throughout**.

All submitted items must:

- be well written, understandable and readable
- have clear sentence and paragraph structures
- have been thoroughly proof-read to eliminate errors in grammar, spelling, syntax, punctuation and formatting.

Cases and background notes

We welcome material on all areas of business, management and government that **have been written for teaching purposes**.

Cases describe real-life business situations. Usually the main character in the case is facing a tricky challenge or decision. Class participants use the case to discuss possible solutions, and analyse the pros and cons of various approaches to the problem.

If the item you are submitting is not a case please categorise it as a 'background note' during submission.

The majority of cases are submitted as written documents, however you can choose to submit a video case (MP4) or a multimedia case (CD or DVD) if you prefer. The guidance below is provided for written cases but the elements marked with * are also applicable to video and multimedia cases.

Structure

Your case must:

- be well presented and structured*
- include a clear opening section
- include a clear closing section
- have labelled exhibits/appendices at the end of the document, these should be clearly referenced within the text of your case
- only include any figures in the body of the text if necessary, if included these should be clearly labelled and captioned.

We recommend that:

- headings and sub-headings are used to break up the text
- the opening section sets the scene and decision point
- the closing section revisits the decision point set out in the opening section
- assignment questions are not included in the case, these should be in the teaching note to provide maximum flexibility for other instructors who may wish to use your case*
- the summary or abstract of the case is not included in the case, this should be in the teaching note and the case metadata*
- learning objectives or your own 'solution' to the case are not included in the case, these should be in the teaching note to support fellow instructors*
- any colour graphs or images used in the case must also print well in black and white as not everybody that uses your case will have access to a colour printer
- end notes are used rather than foot notes.

Content

We recommend that your case:

- is topical and relevant to current management and business education issues*
- is relevant to the industry in which it is set*
- clearly articulates an issue, decision, problem, or opportunity*

Submission requirements



- identifies a protagonist and supporting actors*
- is written in the past tense and in the third person
- does not include the author's personal bias or opinions in the text (these can be included in the teaching note)*
- supports the learning/teaching objectives and theoretical literature stated in the teaching note*
- is short and concise. Our sales show that many instructors prefer shorter cases. No more than 15 pages is a good guide (roughly 30 minutes playtime for a video or multimedia case). However, the length of your case should align with your learning/teaching objectives, so in some situations a longer case is necessary.*

Teaching notes

Cases submitted to us **must include an accompanying teaching note**.

Faculty prefer cases with teaching notes. Nearly half of the cases in our collection have a teaching note, and 95% of our 50 most popular cases have one.

Content

Your **teaching note must** be presented and structured clearly. It must include clear sections that cover:

1. A synopsis of the case

Provide a brief description of what the case is about, and the context in which it is set.

2. The target learning group

Indicate the target learning group, for example, undergraduates, postgraduates, executive.

3. The learning/teaching objectives and key issues

Set out the learning/teaching objectives, and identify the key issues in the case that will help achieve them.

4. The teaching strategy

Describe how the case may be used in class. For example, suggest trigger questions to open the case discussion; offer ideas for group work; suggest how learning can be consolidated at the end of the case session, and so on. This section will generally reflect your own teaching style.

5. Questions for discussion

Include a list of questions designed to promote discussion of the key issues within the case.

6. Analysis of data

If the case contains quantitative data for analysis it can be helpful if the results of essential 'number crunching' are provided in the teaching note. Teachers can use this to check their own calculations.

7. Background reading

Provide references to relevant supplementary material on the case or related issues. You may also provide information on 'what happened next', something students are usually keen to know.

8. Experience of using the case

Include feedback on how the case has worked in different classes, and the issues on which students have tended to focus. This can be useful for other teachers preparing to teach your case.

We recommend that:

- the teaching strategy section includes board plans, timings for the classroom session, alternate ways that the case could be used, and the technical requirements of any multimedia used
- the target learning group section details any prerequisite learning, and positions the session where the case may be used within the course/module
- links to video and audio clips that are relevant to the case are included.

Related items

As well as your case and teaching note, you have the option to submit additional related items on one submission.

This could include:

- another case in the series (e.g. B, C etc case)
- an abridged version of the case
- a background, technical or industry note
- supporting video
- additional material for students (e.g. an exercise, supplementary software)
- additional material for instructors (e.g. presentation slides, supplementary software)
- a version of the case in a different language.

Submission requirements



Case release

Field researched cases

When submitting a field researched case to us, authors **must get signed permission from the subject organisation** to release the finished case for distribution.

This is normally obtained by asking the organisation to sign a form or letter, or send an email, authorising the case's use. [Download an example](#).

Case release is vital to ensure you don't divulge commercially sensitive information that may lead to a claim for damages. In addition, it's always good practice to maintain positive relationships with your contacts in the business world. Gaining permission for case release is an essential part of this.

If a case is based on field research, but the company has been disguised, we still recommend that you request release from the featured company.

Should you undertake field research, but not use it in the case, we recommend that you still show the finished document to the featured company for their comments, although you will not need their formal release.

While we don't require copies of case release documents, during the online case submission process, you will be asked to confirm that you have them.

Desk researched cases

The cases prepared from published sources (e.g. press reports and journal articles) do not require formal release. However, if you have drawn extensively on a particular report then **permission should be obtained** from the publisher for use of the material within the case.

If you have read widely on a particular topic or organisation, and then written the case on the basis of your own distillation of this, then the sources of information should be acknowledged in the case. It may also be wise to send a copy of the draft case to the subject organisation. This can be accompanied by a letter explaining your wish to use the case for teaching purposes, and your willingness to correct any errors of facts they draw to your attention. This should be done as a matter of courtesy, and can even be fruitful in gaining useful additional data for inclusion in the case.

If you are in any doubt about the legal position regarding case release, we suggest that you seek further advice within your institution regarding its policy on these matters.

Copyright and referencing

Who owns copyright?

In most instances, where a case is written by an employee in the course of their employment, it is the employer who retains copyright.

If an employee desires the copyright in a case to be transferred to them, this is a private matter that they must resolve with their employer. However, royalties can only be paid by The Case Centre to member organisations.

Authors, such as lecturers who also work as consultants, may have more than one employer or may have prepared a case outside the course of their employment. Such authors must reach written agreement with all their employers on who retains copyright; this will usually be the institution at which most of the work on the case was carried out.

If copyright is not retained by the author's main organisation you **must upload copies of these agreements** (a copyright waiver agreement) during the online case submission process. [Download an example](#).

Copyright and The Case Centre

By submitting your case to The Case Centre you are granting us non-exclusive distribution rights as set out here. The Case Centre does not ask for transfer of copyright, we act as the agent of the copyright owner.

The Case Centre accepts no liability for any infringement of copyright in materials it distributes or for any libellous material contained in a case. Responsibility for both rests solely with the submitting organisation or author, who will be required to indemnify The Case Centre for any losses incurred as a condition of case submission.

Referencing

If the case is based upon other published material, or is a reworking of a source, such as another case in The Case Centre's catalogue, this **must be clearly referenced** on the cover page of the case.

Submission requirements



References and citations **must be accurate and comply with academic standards**. [View guidelines on academic conventions and bibliographic referencing](#).

We recommend that references are collated at the end of the document.

Teaching tests and peer review

There is currently no peer review process for cases submitted to The Case Centre. However, we do not consider a case to be 'finished' or ready for submission and distribution until it has been comprehensively tested in the classroom.

All cases submitted to us **must have been taught at least twice**.

During the online case submission process you will need to give full details (course title on which the material was taught, name of the institution at which it was taught, details of the educator who taught it, date when it was taught, number of students in the class) of at least two times that the materials that you are submitting to us have been tested.

File format, layout and front pages

File format

- Most items (e.g. cases, instructor materials, background notes) must be supplied as PDF files.
- Videos must be provided as MP4 files.
- Multimedia items must be sent to us on CD, DVD or as downloadable files. We cannot currently host multimedia items online.
- Presentation material can be supplied as a PowerPoint file or a PDF.
- Spreadsheets should be provided as Excel files.

[View a full list of the file types](#) required for different product types.

Document format

All documents must:

- not include borders around the edge of pages

- have a minimum body text font size of 10pt, and a maximum of 14pt
- display page numbers (if included) in the bottom right corner
- not include any blank pages.

Layout of PDF files

Size and orientation must be:

- A4 (no A3, US letter or custom sized pages)
- portrait (no landscape pages).

Margins must be:

- 2.9cm on the left and right of every page
This allows space for the information that we include in these margins on all items ordered or downloaded from our website
- 2.7cm at the top of every page
This allows for the inclusion of our reference number
- 2.7cm at the bottom of the first page
This allows for the inclusion of our distribution footer.

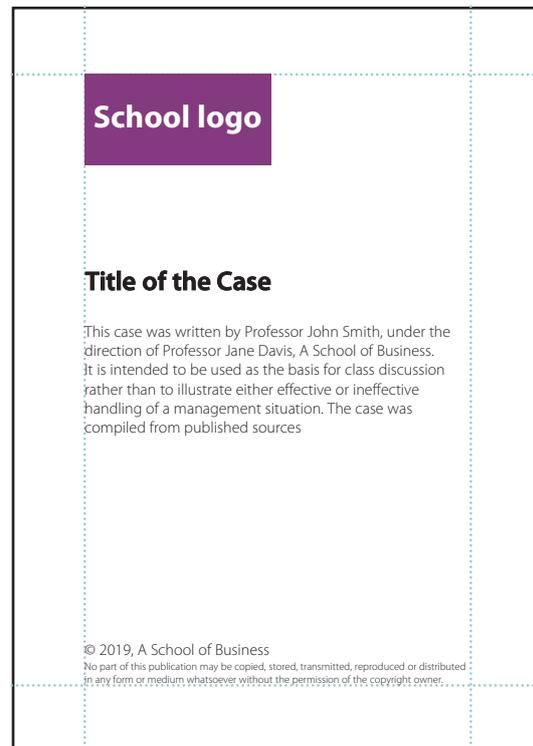
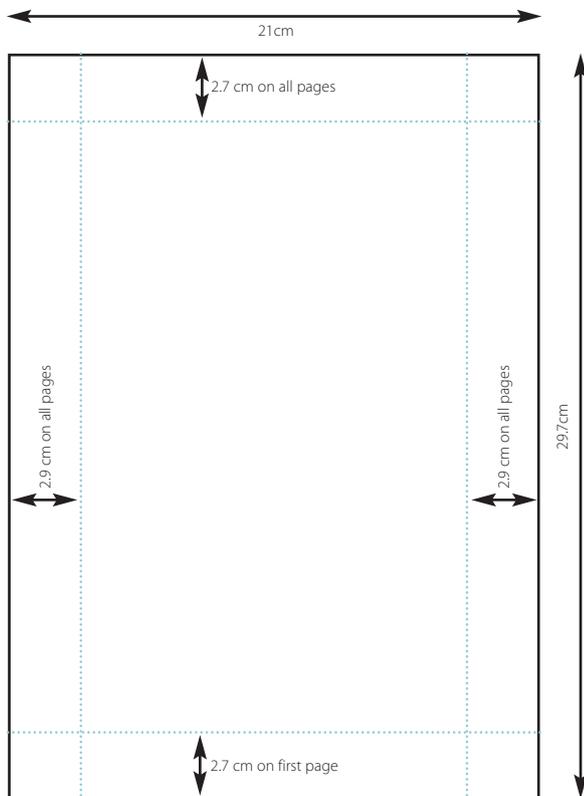
For help formatting your PDF visit www.thecasecentre.org/PDFformat.

Front page

The **following information must be included on the first page** of all documents submitted to The Case Centre:

- 1. Your logo**
The logo of the copyright holding organisation(s).
- 2. Name and organisation of the author(s)**
e.g. This case/background note etc was written by author(s), under the direction of author(s), organisation.
- 3. Disclaimer regarding intent and usage** (not required on teaching notes)
e.g. It is intended to be used as the basis for class discussion rather than to illustrate either effective or ineffective handling of a management situation.
- 4. Information regarding the source of the data/information in the product**
e.g. The case/background note was compiled from published sources.

Submission requirements



5. Copyright statement

e.g. © YYYY, name of copyright owner.

No part of this publication may be copied, stored, transmitted, reproduced or distributed in any form or medium whatsoever without the permission of the copyright owner.

Our online case submission process offers authors the facility to create a front page that includes all these elements.

Data about your case and related items

During the online submission process you must provide full details about your materials for use in our online search database. Please ensure these details are comprehensive as they will help fellow educators to find your items online.

You must supply the product:

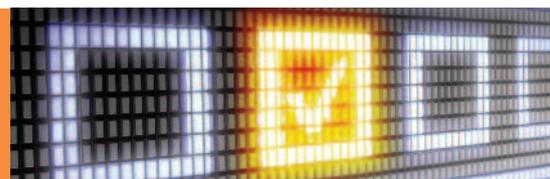
- description (e.g. case, teaching note)
- title

- data source (e.g. field research, published sources, generalised experience)
- language
- subject category (e.g. entrepreneurship, marketing)
- topics (at least one, no more than 15)
- learning objectives (at least one, no more than five)
- abstract (we suggest around 200 words)
- author and copyright ownership information.

We recommend you also supply the:

- geographical setting
- company and protagonist details
- year or time period of events
- intended audience.

Submission checklist



Please make sure that you have completed all the items on this checklist before submitting your case to us.

All items and metadata I am about to submit are:

- In English*
- Proof-read for spelling and grammatical errors
- Well-written, understandable and readable

My case or background note:

- Is written for teaching purposes
- Is well-presented and structured
- Includes a clear opening section
- Includes a clear closing section
- Has labelled exhibits/appendices (if included) at the end of the document

See our additional recommendations for

- [case structure](#)
- [case content](#).

My teaching note:

- Is well-presented and structured
- Includes a synopsis of the case
- Details the target learning group
- Provides learning/teaching objectives and key issues
- Covers the teaching strategy
- Outlines questions for discussion
- Analyses the data included in the case
- Lists background readings
- Details experiences of using the case

[See our additional recommendations for teaching notes.](#)

For my case release I have:

- Obtained signed release from featured company (if case is field researched)
- Received permissions for any material used in the case

Copyright and referencing:

- The copyright owner has been defined
- Waiver agreements have been obtained if the authoring organisation is waiving copyright
- References and citations are accurate and comply with academic standards

[See our additional recommendation for copyright and referencing.](#)

Teaching tests:

- Case and related materials have been taught at least twice

File format, layout and front pages:

- Product files are ready to upload in the correct formats
- Product contents have been formatted correctly
- PDF files meet size, orientation and margin requirements
- Front page prepared, or information ready to create a front page during submission

[See our guidance on formatting documents.](#)

Metadata has been prepared and I am ready to provide:

- Product titles
- Topics (at least one, but not more than 15)
- Learning objectives (at least one, but not more than five)
- Abstract (of about 200 words)
- Author and copyright ownership information

[See our additional recommendations for metadata.](#)

* items must be supplied in English unless they are a translation of the case in a different language.

If you have any questions check out our FAQs at www.thecasecentre.org/SubmissionFAQs.

About The Case Centre



The Case Centre is the independent home of the case method. We are dedicated to advancing the case method worldwide, sharing knowledge, wisdom and experience to inspire and transform business education across the globe. We are a not-for-profit organisation and registered charity.

We:

- distribute the world's largest collection of management cases, articles and books on behalf of all the major business schools and internationally respected authors worldwide
- provide training in case method teaching, learning and writing led by globally renowned experts
- run international case awards and competitions; offer case writing scholarships; and publish books and articles by case method specialists
- provide authors with an efficient and effective worldwide case publishing and distribution service.

Become a member

We are a registered charity and currently have over 500 member organisations from all over the world. Our members are a vital part of The Case Centre community and at the heart of everything we do. Find out more about becoming a member: www.thecasecentre.org/join

Stay in touch with us

w www.thecasecentre.org

e info@thecasecentre.org

 www.linkedin.com/company/the-case-centre

 [@TheCaseCentre](https://twitter.com/TheCaseCentre)

 www.facebook.com/thecasecentre

Explore more...



Undergraduate Case
Teaching Licence

www.thecasecentre.org/UCTL



CoursePack Creator

www.thecasecentre.org/CoursePacks



Learning with Cases:
An Interactive Study Guide

www.thecasecentre.org/guide