

## Obtaining release documents

Before field researched items can be registered in The Case Centre's catalogue, or used for teaching or examination purposes, permission/release documentation must be obtained from the subject organisation(s) to ensure that later difficulties do not arise for the author, his/her institution, or the organisation(s). This is normally obtained by asking the organisation to sign a form or letter authorising use of the product. Once the signed copy of the permission letter is returned from the subject organisation, the distribution and classroom use of the product can begin.

If an item is used without such release it places the writer and his/her employer at risk. Unauthorised use could lead to a claim for damages arising from divulgence of commercially sensitive information. At the very least, the willingness of organisations to co-operate with the teaching institution in future research is likely to be severely compromised. The best advice is always to only ever use a product after written release has been obtained.

### Footnotes

Apart from formal release, it is customary to add a footnote to page one acknowledging the co-operation of the subject organisation and commenting on the intended use of the item. An example is shown below:

*This case was made possible through the generous co-operation of XYZ Ltd. The case is intended as a basis for class discussion rather than to illustrate either effective or ineffective handling of management situations.  
© AN Other, 200X*

### Getting permission

Gaining permission for release from the subject organisation(s) of a field researched product will normally be the culmination of a continuing dialogue with the host organisation begun during data collection and continued during drafting. During this period the question of what the organisation will or will not allow to appear in the final case should have been checked on a regular basis, so that final release becomes a matter of routine, rather than a source of difficulty. The release of an item may be requested by sending two copies of a letter, or form, to be signed and returned by the organisation(s).

#### Sample release request

I very much appreciate your co-operation over the past few weeks in allowing me to talk to you and your staff about the restructuring you have recently implemented within the company. On the basis of these discussions and the documents you kindly provided, we have prepared the attached case study entitled '.....'. I hope this reflects the key issues that you had to address without revealing any confidential information. We believe the case will make a valuable contribution to the teaching of ... on our courses.

When you have noted any final corrections you wish me to make will you please sign and return one copy of this letter to indicate your agreement to publication of the case and its distribution by The Case Centre.

Signed:

Position:

Date:

**The above information, guidance and sample letters are adapted from:**

*Teaching and Writing Case Studies: A Practical Guide*  
by John Heath, 2002  
Published and distributed by The Case Centre