**Teaching Case Study Guidelines**

Before submitting a **teaching case study**, in addition to the *JFDR* manuscript general submission guidelines, make sure your submission meets the following requirements.

1. Submitted cases to *JFDR* must be based on real companies and/or real situations. If needed, authors may disguise sensitive information (e.g., financial data of privately owned firms) and individuals involved in the case. However, if names/data are disguised, authors must disclose this in the case study and teaching note.
2. Cases submitted to *JFDR* can be developed using original primary and/or secondary research data. Primary data are typically collected through interviews with individuals related to the firm or the situation featured in the case. Cases developed exclusively with secondary sources are suitable for publicly traded firms.
3. Authors are responsible for obtaining permission to submit/potentially publish in *JFDR* a case study featuring names and any identifying information about individuals or organizations. This is particularly important for cases based on privately-held organizations. Authors are also responsible for assuring that any needed human subjects’ approvals are obtained.
4. For cases based on publicly traded firms, authors should ensure to cite the relevant information sources in the case appropriately.
5. Following standard practices of case writers, cases submitted to the *JFDR* should be written, whenever possible, in the past tense.
6. Submit both the teaching case manuscript and a Teaching Notes manuscript (also referred to as Instructor Manual). Cases submitted without a Teaching Notes document will not be reviewed/considered for publication in *JFDR*.

If your submission is accepted for publication, *JFDR* will publish the case study but not the Teaching Notes. However, the Teaching Notes file is an essential document for the peer-review process and a valuable resource for potential instructors adopting the case study.

1. Teaching cases and Teaching Notes manuscripts should not exceed 8,000 words in length each, without counting words in Tables and/or Figures. Insert Tables and Figures at the end of each document.
2. The Teaching Notes manuscript should include at least the sections outlined below.
   1. Case Summary, Synopsis, or Extended Abstract.
   2. Intended audience: Specify whether the case is prepared for undergraduate or graduate students, the name of potential course(s) on which the case can be used, and the case’s position within the course(s).
   3. Learning objectives: List a set of at least three specific objectives that the case is intended to achieve.
   4. Research methods: Describe the type of data used in the case (e.g., primary and/or secondary research data), describe any disguises (of individual names, organization’s name, and/or data), and provide human subjects’ approval information, if appropriate.
   5. [Optional] Theoretical foundation or framework: Provide a brief overview of the theoretical concepts and frameworks that support the analysis/discussion of the case. You are encouraged to include a list of recommended reading materials that instructors may find helpful when adopting this case study.

This section is optional because authors may choose to include the theoretical concepts in their discussion of each assigned question (refer below).

* 1. Assigned questions: List a set of questions aligned with the learning objectives. These are the questions instructors adopting this case may assign students. The case must provide enough data/information to respond to these questions. The last question will usually ask students their overall recommendation (conclusion) regarding the case’s main issue.
  2. Discussion of each assigned question: This section is the core of the case analysis and generally the most extensive. Authors provide potential responses to each question using recent literature, theory, or research findings. Authors should keep in mind that this section should be written for potential instructors adopting the case (and journal peer-reviewers). Thus, the discussion should help instructors understand how theory applies to the case study, how responses to each question might be approached by students (potential difficulties they may encounter, alternative answers, etc.), and provide insights contributing to the effective use of the case.
  3. [Optional] Epilogue
  4. References