

## NORTH AMERICAN CASE RESEARCH ASSOCIATION (NACRA)

### HOW TO GET THE MOST OUT OF THE CASE DISCUSSION SESSIONS

(By Timothy W. Edlund, modified by Linda E. Swayne)

#### **PLEASE READ THESE SUGGESTIONS AS SOON AS YOU RECEIVE THIS.**

Cases and instructor's manuals (sometimes referred to as teaching notes) for your session are included in this *Session Proceedings*, as well as some instructions to gain the most for your participation at the annual meeting. Please come prepared to discuss all cases that are included for your roundtable.

NACRA's annual meeting is a developmental workshop. Each person contributes to each case discussion and in turn receives comments from each person at the roundtable. Plan to be at the roundtable discussion sessions for the allotted time on both Friday and Saturday mornings. It is unfair to expect others to be prepared and comment on your case without your providing the same for them.

Each participant's preparation prior to arrival in Sedona is crucial to the success of each workshop session! The Conference will begin on Thursday at 5:00 PM, and will continue after dinner. There will NOT be time for you to prepare cases that evening. More than an hour's preparation may be needed for each case.

#### **PURPOSE OF NACRA CASE PRESENTATION SESSIONS**

Our purpose is to assist all presenters to improve their cases for use in classes, for adoption by others, and for publishing. Rarely is a case presented that is nearly ready for journal publishing; yet even such a case can be improved. Case authors may feel overwhelmed by all the suggestions. The process is not negative; rather, we work with you for improvement, just as we expect that you will help others improve their cases. Therefore, all participants must thoroughly prepare all Cases and Instructor's Manuals. Several important questions to ask yourself include:

- Is the case interesting? To students?
- Does it address an important issue in the specified course(s)?
- Can teaching objectives be achieved with the case? Does the IM address these?
- Can the IM analysis be derived from the case (and other course material)?
- Is there enough data? Should more be added? Should some be deleted?
- Is the analysis tied to theory? (always difficult)
- Is the case presentation unbiased? Or is the author's opinion evident?
- What types of response are expected from "A" students? from "C" students?

The discussion process is rigorous, but it is done lovingly. We hope that you will agree. You

should expect that the first case discussed, long or short, will take more time than those that follow. Some issues will occur in several cases; discussion thereof need not be repeated after the first time they arise.

## **HOW TO PREPARE YOUR CASE CRITIQUES**

We focus upon major as well as more subtle ways to improve cases, not on proofreading details of grammar, spelling, rhetoric, etc. Yet authors need to know about these problems, in addition. To facilitate this information transfer, the *Session Proceedings* is in a loose-leaf format so that each participant can give case authors a marked copy of each case and Instructor's Manual (also called Teaching Note), after discussion of that case. To give this kind of feedback, please do one of the following:

- 1) If you do not want or need to keep the other cases in your *Session Proceedings*, mark up the cases and IM; remove and give them to each author after his/her case is discussed.
- 2) If you wish to retain the complete book, or a particular case, photocopy all pages, or those pages having your written comments, and give the copies to the author.
- 3) If you wish to retain the complete book and do not want to make copies of the cases, prepare a clear written statement of suggested changes and proofreading corrections. Give location details, using page numbers, paragraph numbers, etc. Use of symbols such as [p. TN-3] shortens location detail.

## **DUTIES OF PARTICIPANTS IN THE CASE ROUND TABLES**

### **SESSION CHAIRS:**

Brief session participants about what will happen. Determine case sequence. Be sure there is a recorder for each case, preferably with prior workshop experience. Guide discussion. Keep focus on important issues, not on proofreading. Discourage repetitious comments.

### **RECORDERS:**

Record substance of comments, in an appropriate way. One extra copy of each case and IM will be available if you wish. Give comments to the author(s).

### **CASE AUTHORS:**

Review your Case and IM before the meeting, using the version in this *Session Proceedings*. You might want to prepare some opening remarks that explain why you wrote the case, how you have used it in class, and any issues you are particularly looking for suggestions as to how to handle or improve. Listen to comments and ask questions whenever you do not understand. Bring an audio recorder if you wish.

### **DISCUSSANTS:** [All other authors and other participants]

Prepare cases and participate actively in the discussions.

## OTHER POINTS

There may be participants in your session who are not presenting a case. They are there to observe, to learn, and to participate. It is possible for them to learn nearly as much as when their own case is discussed. Welcome them!

Most participants find that these sessions are more enjoyable and collegial than any other type of academic conference they attend. We hope that you will agree, and we have planned the conference to provide several interesting, enjoyable, and instructive activities. We look forward to your participation.

## AFTER THE WORKSHOP

Revise your Case and IM to improve them. Carefully consider all session comments; some changes may not be appropriate or feasible, in your opinion. Some suggested data may not be available. However, you are likely to see the more cogent changes you don't make in reviews of your case when you submit it to a journal. Can you defend your choices when you respond to reviewer? Test-teach the revised case and update your IM based on that teaching experience. Get a colleague to observe your teaching or to teach the case, if possible; he or she will find things you missed or that you know but didn't include. (The author always knows more details not included in the case.)

Submit your revised Case and IM to the *Case Research Journal* or to another journal. If it is accepted for publication in the *Case Research Journal*, your case will be eligible for consideration for NACRA's Curtis Tate award. This is awarded annually to the best case published or accepted for publication in the journal. Details about the *Case Research Journal* and the Tate Award will be provided during the conference.

Most journal submissions will require at least one revision before acceptance. Failure to revise and resubmit represents the largest category in the number of initial submissions not published by the *Case Research Journal*! If one journal rejects your case, another journal may accept it.

Once your case is accepted by a journal, or finally rejected, it is then appropriate to submit it to book authors for adoption. Earlier acceptance by book authors disqualifies your case for most journals. Why? Because it is highly undesirable to have two versions of the same case in the marketplace. Book acceptances often carry merit, depending on your school, but rarely have as much academic credit as acceptance by a peer-reviewed journal.