

CASE FORMATTING INSTRUCTIONS **NORTH AMERICAN CASE RESEARCH ASSOCIATION (NACRA)**

This instruction deals with two stages in the process:

- 1) Submission to gain acceptance for presentation at the annual meeting, and
- 2) Once accepted, formatting for binding into Session Proceedings for presentation and discussion.

Submitting the Case and Instructor's Manual/Teaching Note

Cases presented for initial review may be submitted in any reasonable format. But the following will aid the review process and you. Cases should be typed, single or double spaced. Care should be taken that author(s) are not identified except on the cover sheets for the case and for the Instructor's Manual (Teaching Note). If you cite several of your own works, delete your own name from end notes, and so on in the review copies. Number your pages; start a separate series for the Instructor's Manual (use IM-1, IM-2, etc.). Printing may be either one-sided or two-sided. Number your exhibits in the order you introduce them in the text of your case; provide a separate number series for IM exhibits. Short exhibits (under one-half page) can be placed as in-text tables. Do not place an abstract at the beginning of the case.

The case should have a footnote at the bottom of the first page that adheres to the following format:

This case was prepared by (names of case author(s) and university affiliations) and is intended to be used for class discussion rather than to illustrate either effective or ineffective handling of the situation.

Presented to and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 2009, Santa Cruz, California. All rights reserved to the author(s) and NACRA. © 2009 by (author).

Formatting Your Case and IM after Acceptance

First, consider the reviews you received with your acceptance, any guidance from the track or program chair, and your own experience with the case since you submitted it. Carefully revise the case but within the time limits provided.

Second, as needed, reformat the case for binding and redistribution. Cases and IMs will be bound, in loose-leaf binders. Be sure to leave sufficient margin (1.0" minimum) on the left side of odd pages and on the right side of even numbered pages (printing on both sides). If practical, single space all text material. Leave a full space between paragraphs; use topic headings and other white space to increase readability. Use either full justification or left justification as seems useful. Use proportional spacing if you can, and a type face designed for that, in 12 point font.

Note that a separate Instructors' Manual (Teaching Note) is required. It is reviewed as thoroughly as the case and should include all points highlighted in the call for cases and papers. The IM contains the analysis of the data you collected and presented in the case; it is separated so that students do not have

the analysis as they struggle with the case issues. Consider providing the instructor with a teaching plan and guidance as to what you expect in papers from an outstanding student. The IM should have a footnote at the bottom of the first page that adheres to the following format:

This case was prepared by (names of case author(s) and university affiliations) and is intended to be used for class discussion rather than to illustrate either effective or ineffective handling of the situation.

Presented to and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 2009, Santa Cruz, California. All rights reserved to the author(s) and NACRA. © 2009 by (author).

If the case is not ready for general use, include a restrictive note in the first page footnote. If the case is disguised, it is appropriate to include that information (including the extent of the disguise) in the first page of the case footnote as well as in the IM as part of a description of the research methodology of the case.

Page numbers should be included, starting with "1" on the first page. It is particularly useful to include a running header in your case, with not only the page number but also the case name. That practice is illustrated in this document. Ordinarily, the first page would have the header suppressed; it was left here to suggest that the header could be placed on the opposite sides of odd and even pages. Repeat page numbering in your Instructor's Manual again starting with IM-1 on the first page.

For inclusion in the *Proceedings*, your case and IM should be printed on both sides of the paper. Number all pages consecutively, including any blank pages. The first page of the IM should be on the first side of a new sheet (left hand page). If practical, have the printing done on paper that is pre-punched for standard three ring binders. [Authors of cases submitted from outside North America should not attempt to meet this requirement, since standards vary. Submit cases and IMs electronically and the Track Chair will handle duplication.]

Exhibits should be placed at the end of the case and pages numbered. Do the same for the IM.

For your information: Your case and IM will be placed with others into a *Session Proceedings which may be mailed to you electronically*. Note that you may consider this a refereed publication; it has been double or triple blind reviewed before acceptance. Each session *Proceedings* will be assembled so that you may either preserve it in its entirety, or remove various cases for marking suggestions to other authors and to give those records to those other authors.

More information will come with your acceptance and from the case *Session Proceedings* editor.