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The case teaching note

Speak to any group of business school instructors who teach extensively by the case method, and you will almost certainly encounter strongly-held opinions on the value and importance of teaching notes. However, even those who shun their use will grudgingly acknowledge that a teaching note, well-written, can be a valuable tool in the process of selecting and adopting a case from The Case Centre's large collection. This is clearly demonstrated by the extent to which cases that are accompanied by good teaching notes find their way into The Case Centre's best-selling lists. 40% of the cases in the catalogue have a teaching note but, 95% of the 50 most popular cases have one.

It has always been a requirement that cases accepted for publication by The Case Centre have been tried and tested in a learning environment, and have been proved to be pedagogically effective. In the interests of meeting the expectations of potential case users, some basic standards for teaching notes are also required. These standards apply to the scope of the teaching note and do not attempt to dictate the style, structure, or detailed content. However, they will ensure that a reader can expect a document described as a 'Teaching note' to contain certain fundamental elements.

What is a teaching note?

A teaching note, usually, but not necessarily, produced by the author of the case it accompanies, is a document designed to give other potential instructors valuable insights into the case and the learning which can be derived from it. It will also provide suggestions on how to maximise the learning potential of the case. Teaching notes may vary from the detailed and discursive, to the short and informal. However, irrespective of length, there are certain elements that should not be ignored or overlooked when preparing a teaching note. These elements are listed below and, for a teaching note to be accepted for publication by The Case Centre, it will be necessary for authors to ensure that all six elements are adequately addressed.

1 **Summary of the case**
The teaching note should include a brief description of the case and its context.

2 **Teaching objectives and target audience**
It should describe, with examples, the key issues and intended learning objectives, indicating the target group or class level for which the case was written.

3 **Teaching approach and strategy**
It should suggest how the case may be used in class and ways in which the class may be conducted. It may offer 'trigger' questions for opening and advancing the case discussion, suggestions for group work or student assignments, how to consolidate the learning, etc. Useful additional information could include suggestions for a teaching plan. It should also give some indication of the case's demands on course time-tabling.

4 **Analysis**
The analysis should offer comprehensive answers to the list of questions and should, at least, be as thorough as one would expect from the best student. If the case includes quantitative data, it might suggest ways of utilising the data, and should ideally include the details of any spreadsheet analysis. At the very least it should indicate the techniques to be used for analysing the data.

5 **Additional readings or references**
Suggested additional readings should be listed if it is necessary (or helpful) for students to read text or other material in conjunction with the case. Specific readings can be assigned from these lists.

6 **Feedback**
It should provide an indication of how the case worked with different student groups; where possible indicating the case's suitability for written assessment or examination, role-playing, or other forms of use. Where known, it might also include the actual outcome of the case situation, and some follow-up facts.

References

Heath, J (2006), *Teaching and Writing Case Studies: A Practical Guide* (The Case Centre) ISBN 978-0-9078-1503-7

Leenders, M R and Erskine, J A (1989), *Case Research: The Case Writing Process* (The University of Western Ontario) ISBN 0-7714-1045-X

Reynolds, J I, *Case Method in Management Development* (International Labour Office)

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

Information on the front page

If you use a house style and branding in your documents we suggest that in addition to your logo, the following information should be included on the first page:

1 **Name and organisation of the author(s)**
eg This case/background note/article etc was written by author(s), under the direction of author(s), organisation.

2 **Disclaimer regarding intent and usage (not required on teaching notes)**
eg 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.

3 **Information regarding the source of the data/information in the product**
eg The case/background note/article was compiled from published sources.

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An example front page is included on the next page of this document.

Example front page

AESE
Escola de Direcção e Negócios

The Grameen Bank
Credit as a Human Right

Case study
Reference no 807-055-1

This case was written by Ana Janeiro Dias,under the supervision of Professor Eugénio Viassa Monteiro,AESE - Escola de Direcção e Negócios.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.The case was made possible by the co-operation of Muhammad Yunus.

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