SCR Society for Case Research
Editor: Ann M. Hackert Spring 2009

Message from the President

The SCR Annual Meeting at the Drake Hotel on March 18-20, 2009 in conjunction with MBAA (Midwest Business Administration Association) for the second year in a row attracted record attendance for our program. Program chair Mark Bezik (Idaho State University) put together a great program of papers, critical incidents and embryo cases, and panel presentations.

We now look forward to the **2009 Summer Case Writers Workshop** on **June 25-27** on the campus of Middle Tennessee State University in Murfreesboro with long-time SCR member Joe Thomas as program chair and host. The deadline for case submissions to Joe (contact him at jgthomas@mtsu.edu or 615-898-5652) is May 1, 2009.

A number of new officers and board members were elected at the membership luncheon and business meeting in Chicago. Eric Nelson (University of Central Missouri) will be our program chair for the 2010 Annual Meeting, and Craig Rabe (Luther College), Leslie Korb (Georgian Court University), and Tim Redmer (Regent University) were elected to the board of directors. SCR secretary Jan Papiernik (Indiana University- Purdue University Fort Wayne and I were each elected to serve an additional year in our positions. All other officers and board members either continued in their multi-year positions or moved up following the progression of offices specified in the SCR Constitution. A list of the 2009-10 SCR officers and their contact information is included in this issue of the *SCR Newsletter*.

At the luncheon business meeting, Joy Benson (University of Wisconsin river Falls), editor of the *Journal of Critical Incidents*, awarded the Best Critical Incident Award for 2008 to Mary K. Foster and Augustus Abbey (Morgan State University) for their incident "Going Live." Bill Stratton presented the Philip C. Fisher Distinguished Service Award to Joe G. Thomas "in recognition and thanks for his many years of extraordinary effort on behalf of SCR and its members."

The first edition of the new ***Journal of Critical Incidents* (*JCI*)** under the editorship of Joy Benson (University of Wisconsin River Falls) was published in October 2008. This electronic journal provides an outlet for critical incidents presented each year in March at the SCR annual meeting. Following the meeting, they are subjected to a blind review and revision process. This year's *JCI* volume will be published in October 2009.

The **SCR Website** (www.sfcr.org) continues to be updated to be more useful to members and others seeking information about SCR and its activities. SCR cases and critical incidents published since 2002 in *Business Case Journal, Annual Advances in Business Cases*, and the new *Journal of Critical Incidents* are now available in a searchable database within a special SCR member section of the website.

I thank everybody attending the Annual Conference in March for their enthusiastic participation in the sessions and for all the helpful feedback they gave to presenters. The SCR succeeds only because of the willingness of its members to actively take part in our meetings and workshops.

Bill Stratton
SCR President, 2009-10
Idaho State University

IN THIS ISSUE:

When Was the Last Time You Visited the SCR Website?

If you haven't already visited the society's website, www.sfcr.org, take a few minutes to cruise around the site and find out what it has to offer. We are constantly making changes and improvements, so expect to find something new almost every time you enter the site. From announcements about upcoming workshops and conferences to copies of the latest cases, which can be found in the "Members Only" area, you should be able to find something of interest.

The website has been designed with your needs as a case researcher, writer, and teacher in mind. With that as our goal, suggestions for improvements and additions are always welcomed. If you have an idea that would enhance the value of the site, please send it to casemanager@sfcr.org. For now, keep a close eye on the "Resources" link as plans are underway to enhance the offerings on this link before the 2009 Summer Workshop.

Membership Dues and Information

It is important to remember to pay your dues for membership in SCR. You need to be a member of SCR to attend and present at meetings. Your dues also include subscriptions to SCR publications.

1. When you pay your dues every July you automatically get the Proceedings, Annual Advances, Business Case Journal and the new electronic journal, Journal of Critical Incidents. Do not pay for the proceedings again when you register for the MBAA—don't check that box.

2. To pay online, go to https://www.scr.org/members/ and follow these directions: The Pay Dues link will bring you to the payment page. At the top, it will show when your membership expires. To make a payment, select the membership type you want, 1-year or 2-year and whether you are located in the U.S., Mexico or Canada. Click the "Pay with PayPal" button. Follow the instructions provided by PayPal and then return to the SCR site. You will need to keep your payment status active to receive information from the SCR. Those who wish to pay by check can mail it to the address on the Pay Dues page; your payment status will change once payment is received.

3. SCR runs on a July to July membership year. Go online or send a check made payable to the Society to Case Research: If you pay by check, please make sure you send it to Karen at her home address That address is Society for Case Research c/o Karen Foust, 207 Belle Meade Blvd., Thibodaux, LA 70301-4907.

Upcoming Summer Workshop Locations

- 2009: Middle Tennessee State University, Joe Thomas, June 25-27
- 2010: Date and Location to Be Decided. If you are interested in hosting a summer workshop, please contact President Bill Stratton (208-282-2281 or strabill@isu.edu)

Case Writer's Corner

This newsletter introduces a new feature to the newsletter. The "Case Writer's Corner" will contain brief articles designed to help new and veteran case writers as they research, write and publish cases. The goal is to provide practical information and insights to help you develop your research as you write cases. Bill Stratton has authored the piece below to provide some useful information for case writers.

Ann Hackert
Newsletter Editor

WRITING A CASE OR CRITICAL INCIDENT
Bill Stratton

Introduction

This note is intended for individuals interested in learning about case research in order to decide if they want to get into writing cases or critical incidents for publication. The following summary answers most questions prospective case writers have about the requirements and nature of case writing and the avenues available for publication through the Society for Case Research.

Case or Critical Incident?

A case is a fairly detailed description of an organizational situation that provides students with enough information to analyze problems and make action recommendations for resolving them. A critical incident is similar to a case but provides less information upon which to base an analysis and, instead, briefly describe a provocative situation upon which the students bring their background and knowledge to bear to arrive at a course of action. Both critical incidents and cases should contain all information that the students will need for class preparation, except for possible companion readings or industry notes. Critical incidents are accepted for presentation by the Society for Case Research at its Annual Meeting held each March in Chicago and are published in its *Journal of Critical Incidents.* Harvard Business School Publishing is also now distributing what it terms "brief cases" in response to the demand for shorter cases.

Case Writing Basics

Types of cases: Cases can be of two distinctive types, decision cases and descriptive cases. Decision cases require analysis leading to action recommendations to resolve a crisis and/or long-term problem depicted in the case. Descriptive cases require analysis to understand the dynamics of a situation but do not require any recommendations for action. Critical incidents always have a decision focus.

Real situations: All cases and critical incidents submitted to any case writing venue must involve real situations in actual organizations. Fictitious "armchair" cases or critical incidents are not acceptable. However, authors may disguise the identities of some or all individuals depicted, disguise the name of the organization itself and its industry or location, and alter financial or other data to avoid violating individual rights to privacy or to avoid revealing proprietary information.

Permission to publish: By submitting a case or critical incident for publication, the author is verifying that a release granting permission to publish the case or critical incident has been obtained by the author from appropriate individuals or organization representatives and that this release is being retained in the author's files. An editor may ask for a copy of the release prior to publication. This requirement applies to all cases and critical incidents, including those containing disguised information, where individuals from the organization contributed to the case. If a case or critical incident is written entirely from publicly available secondary sources, with no direct communication with anyone involved in the case, the author is not required to obtain a release for publication.

Researching Cases

A case describes a situation faced by an organization, usually from the point of view of some key decision maker, and provides students with the opportunity to develop their skills by analyzing the situation and making some action recommendations. There are two major approaches to conducting the research to write a case:

1. Direct involvement with the organization, which provides relevant data and access to people. This approach can provide access to detailed company data and allow the opportunity to talk to numerous informants to gather rich information concerning the perceptions and feelings of different individuals concerning the situation (this approach necessitates securing a release prior to publishing the case).

2. Public documents (industry data, company web sites, newspaper and magazine articles, court records, etc. This approach can provide sufficient data for writing a case in situations where a lot of information is published and available, such as with very high-profile companies or situations. One advantage of a case written from purely public sources is that permission from the organization to publish is not necessary.

Collecting and Analyzing Data

Depending on the approach taken, data is gathered by request from the organization or through independent research among publicly available sources. The information gathered can include industry data, company records, and the outcomes of interviews with various people both inside and outside the organization who can provide information relevant to the case being developed. Usually, writing a case about an organization is a collaborative effort between a case author and at least one informant from the organization, usually an individual integrally involved in the decision situation that is the subject of the case.

The type of information sought and its extent will depend on the focus of the case. The writer should have a focus for the classroom use of the case and direct information gathering to create a rich panoply of data surrounding the issues to be explored. Complexity is added to the case if the data gathered is not pre-organized for the student, but presented in its natural disarray as is the case in any organization. Some data provided may be merely opinions of individuals in the situation or their conclusions about what they think might be occurring. Students must then sort out fact from opinion or try to make some sense out of multiple opinions.

Some case writers also provide additional more or less extraneous or marginal data so that students must decide what is important from the jumble of information provided. It is very often useful to provide information in the exact words of informants, which are laden with subtleties and overtones that editing would remove. This lends verisimilitude to the case, particularly to cases involving behavioral issues.

Disguising a Case

At times, organizations are sensitive about revealing proprietary information, information which may help competitors or be held private for other reasons. In these cases, inclusion of the information in the case can often be altered, e.g., by presenting percentages or ranges of data rather than the explicit numbers in order to protect the company's interests.

In other instances, the organization may require changing the names of individuals in the case, or the name of the organization itself and its location, to protect itself. In some cases, even the industry involved may be masked at the request of the organization to maintain anonymity. As the degree of disguise increases, the integrity of a case and its usefulness are compromised. If the organization is disguised, then students can do no research about the actual company in completing their analyses. If, in addition, the industry is disguised, then even less information is available for inclusion in any analysis. Hence, while sometimes necessary, disguising a case is usually detrimental to its usefulness.

Writing the Case

An effective case usually embodies certain elements or characteristics:

1. The case should seem authentic and realistic. Facts, quotes, exhibits, pictures, and even videos can be used to add life to the case. The issue focus should be of general interest and not be narrow or so arcane as to be of little interest or instill little enthusiasm in students. A good case will allow students to apply knowledge and theory they have been exposed to in classes to their analyses.

2. The case should provide sufficient information for the student to analyze the issues. Background information, the context, descriptions of the individuals involved and their perceptions, as well as facts and figures are needed for a case to stand alone as an exercise for students. Information necessary for students to answer questions raised in the Teaching Note must be present in the case.

3. Cases are written in narrative style (they tell a story) in the past tense and usually include certain information in a logical order. After a brief introduction, most cases introduce what is known as the "hook," the basic question or issue to be resolved presented in a way to grab the reader's attention. Following the "hook" come the basic facts of the case including, as pertinent, industry background, company background, and information about the current situation. Most cases end up returning to the initial issue introduced by the "hook" and often provide some summary of possible avenues to resolution that provide students with some ideas to begin their analyses.

4. Cases may present examples of good or bad management. It can be as instructive to analyze why a particular management approach is successful as it is to examine unsuccessful decisions.

5. Cases should be well-written and organized. However, the data and information presented should not be organized to the extent that the selection of which data are relevant and the most effective way to organize them to make a point is done for the student. As in the real world, students should have to decide what information is important and how to organize it to support their recommendations.

The Teaching Note

All cases and critical incidents must be accompanied by a Teaching Note, which is often much more difficult to prepare than the case itself and represents the real research component of case writing. Teaching notes are kept by publishing entities and can be obtained by legitimate users for appropriate purposes (textbook authors, classroom adopters) from the publisher. Most publishers require that teaching notes follow an outline similar to the following (which is from the Society for Case Research).

1. Overview
   The overview section provides a synopsis of the case or critical incident that includes the salient points and the courses for which the case is appropriate. With case submissions, it may be appropriate to include a statement as to whether the case is a decision case or a descriptive case and any possible additional applications.

2. Learning Objectives
   A list of learning objectives for students exposed to the case or critical incident must be provided. (As a guide in formulating learning objectives, Bloom's taxonomy of learning objectives is suggested (Benjamin S. Bloom (1984). *Taxonomy of Educational Objectives.* Boston, MA: Pearson Education). There are also several useful versions on the web. See for example www.coun.uvic.ca/learning/exams/blooms-taxonomy.html, or, www.washington.edu/slo/.)

3. Research Methods
This section should include a statement on whether or not the case or critical incident is disguised and the extent of the fieldwork conducted. Disguise may range from none, to partial (for names, locations, or certain numeric data—financials, dates, market shares, etc.) to complete (for names plus locations plus all numeric data). If disguise is employed, the disguise must be proportional to the actual company and situation. The student must be able to develop a proper answer from the disguised data.

4. Questions
Provide a list of questions for students to answer, without the answers. The purpose of this is to enable adopting instructors to track the expected flow of the discussion against the list of Learning Objectives.

5. Answers to Questions
List each question and then provide a correct, clearly written answer to the question as well as additional discussion for the benefit of the adopting instructor. The primary intellectual contribution in case writing is found in this portion of the Teaching Note. Use references to cite published materials where appropriate. Develop tables and figures summarizing analytical methods or points as appropriate. Specify where in the case information is located that is being used to develop an answer (e.g., the author might indicate that the instructor should see Table 1 in the case).

6. General Discussion or Additional Issues
This section is optional, but may be included to summarize the issues or discuss any points not otherwise covered. Often, suggestions are made about how the questions can be used or integrated into class discussions. Also, classroom exercises or experiential learning suggestions can be introduced here. A discussion of the actual case or critical incident outcome may be included here or under the Epilogue heading.

7. Epilogue
This optional section is used to provide information regarding actual outcomes subsequent to the time period described in the case or critical incident. Students are often quite interested in finding out "what happened," but must be apprised that the actual outcome may or may not represent the best solution to the situation. The actual outcome should be taken by students as a possible answer to the situation rather than the only "right" answer.

8. Additional Pedagogical Materials
Some case studies may require industry notes, or technical notes specifically related to the case situation described. These may be included in this section if they are not included as an appendix or integrated directly into the text of the case or critical incident itself.

9. References
The reference section includes all citations that were referenced in the TN. Relevant articles and books for the instructor who might like additional background reading for a specialized case may also be provided here. Authors should use APA guidelines to format this section.

Summer Workshop 2009

Submission Deadline: May 1, 2009

Meeting: June 25-27, 2009

SOCIETY FOR CASE RESEARCH

31st Annual
Summer Case Writer's Workshop

Middle Tennessee State University

Murfreesboro, TN 37132

The Society for Case Research's 31st Annual Summer Case Writers Workshop is planned for June 25-27, 2009 on the campus of Middle Tennessee State University (MTSU). The campus is located in Murfreesboro, TN, approximately 30 miles from Nashville. The area is well noted for Civil War battles, music, and excellent shopping and should provide many entertainment opportunities for non-participants in the workshop and vacation opportunities before and after the workshop.

Workshop Purpose: The primary purpose of the workshop is to develop and improve business research, case writing, and the case reviewing skills of participants. The workshop helps aspiring case writers, beginners, and experienced case writers prepare and develop cases and teaching notes for classroom use and/or publication.

Abstracts of all cases accepted for presentation will be published in the *Conference Proceedings*. Cases presented at the workshop are eligible for submission to *Annual Advances in Business Cases*, a blind-refereed publication sponsored by the Society for Case Research.

Case: Case submissions must be based on real events in an actual organization, although individuals and/or the organization may be disguised to preserve anonymity.

Submissions can be a ***decision case*** in which the student is placed in the manager's (decision-makers) position and asked to make recommendations appropriate to the context of the situation. ***Descriptive cases*** are also accepted. A descriptive case is a description of a real situation. Author(s) must present sufficient background information such that the student can evaluate how effectively the situation was managed.

The contact person is Joe Thomas, jgthomas@mtsu.edu, or 615-898-5652.

2009 Annual Meeting - Drake Hotel – Chicago

Awards

President Bill Stratton, center, awards Mary Kay Foster and Augustus Abbey (not pictured) from Morgan State University the 2008 Best Critical Incident Award for “Going Live.” Joe. G. Thomas, receives the 2009 Phillip C. Fisher Distinguished Service Award.

2009 Meeting A Great Success!

This year’s annual meeting was a huge success. A total of 65 registrants participated in panels, presented embryo cases and critical incidents. The annual meeting offers a unique opportunity for faculty to develop and publish in the new *Journal of Critical Incidents*. Publication is limited to those who both present at the conference and then successfully complete a double-blind review process. Presenting an embryo case is a great way to get feedback from experienced case writers as you develop your research.

Conference attendees at this year’s meeting presented a total of 3 papers, 4 panel sessions, 29 Critical Incidents and 13 Embryo Cases. A successful silent auction was held and we wish to thank all those who donated items and who bid on the items.

Eric Nelson agreed to chair next year’s Annual Meeting committee which will again be held at the historic Drake Hotel in Chicago, March 24-26, 2010. Karen Berger agreed to act as chair of the Silent Auction committee. The feedback from this year’s meeting indicated that most everyone experienced the collegial spirit that has become the hallmark of SCR events. Plan to join us in Chicago in 2010!

2010 Annual Meeting March 24-26 at the historic Drake Hotel in Chicago.

SCR OFFICERS AND BOARD MEMBERS – 2009-2010

The *SCR Newsletter* is published three times a year by the Society for Case Research. Editorial work is completed at Idaho State University by Dr. Ann M. Hackert. The newsletter is distributed via e-mail and is available online at www.sfcr.org.

The purpose of the Society for Case Research (SCR) is to assist in the development of individual efforts in the field of case writing, case teaching, and case research, which enhances business education. The major objectives of the SCR are to provide programs for the exchange of ideas and the improvement of case research, writing, and teaching; to assist in the publication of written cases or case research and other scholarly work; and, to provide recognition for excellence in case research, writing, and teaching.