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ANZSOG CASE WRITING GUIDE

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Established in 2004, the John L. Alford Case Library is a database of public sector case studies and a resource centre for the advancement of learning and interactive teaching. ANZSOG cases are publicly available and free of charge. Associated teaching notes are available upon request to bona fide academic staff and others engaged in teaching.

This case writing guide has three parts:

> **PART A:** What is a case?
> **PART B:** Case structure: decision-forcing cases and lesson-drawing cases
> **PART C:** Ethics, etiquette, and political sensitivity

PART A: WHAT IS A CASE?

A case is an engaging narrative centred on **a compelling dilemma, decision, event, or opportunity.** Cases present real-life situations along with the perspectives of the people involved. Cases ask: What were the challenges people faced? How did they respond to those challenges? Were the responses the best ones given the context? What lessons have been learned?

The **ideal length** is around 5000 words (10 pages maximum, excluding appendices). Cases can be shorter or longer depending on the nature or complexity of the material, but shorter ones are generally preferred.

A case study:
- is **not a traditional academic paper.** Case studies are linear narratives written in an accessible style, and rarely discuss academic theory
- is **not a comprehensive history** of an organisation or policy field. While context and history are important, case studies focus on specific dilemmas, decisions, and events
- is **not required to provide policy recommendations**. However, cases do provide insights and reflections on policies and their implementation, which may inform future policy development
- is **not a puff piece** that describes a reform or event where everything went perfectly. All government decisions and interventions face challenges. Cases explore those challenges in depth and do not gloss over difficulties or setbacks
- **makes a contribution to knowledge and understanding**. It is not simply a good story or a collection of facts. Writers should be clear what contribution they are making. They should ask themselves: what is the intended outcome or purpose of writing the case?

How are case studies used?

Case studies codify and share situations from which learning can be derived. They are used to educate future public sector leaders and others by allowing students to think about the constraints that governments and individuals face, and the options available to decisionmakers, amongst other things. Cases are also used by practitioners to inform their own decisions and interventions. Moreover, our cases contribute to academic research and meet academic standards of rigour.

Writing Style

- **Capture readers' attention by writing in an interesting and engaging style.** Cases should be enjoyable to read
- **Focus on people.** Try and identify the actual people making decisions and taking actions and avoid referring to institutions as the main actors. The 'actors' make the case relatable and allows the reader to visualise themselves within the organisation. All organisations have people who control/make decisions
- **Put readers in the shoes of the protagonist/s.** Cases should illuminate what key individuals were thinking and help readers understand the tension of the situation. They should be relatable for your audience
- **Include quotes** from key individuals, but ensure the quotes are clear and insightful. Edit long quotes down to their substance. Quotes from published sources / the media should be clearly referenced
- **Write for a broad audience.** Use simple and easy-to-understand language so that the case is accessible for a wide variety of readers. **Avoid technical terms and jargon**
- **The narrative should follow a clear storyline in chronological order.** Keep readers focused on the main thrust of the narrative and avoid distracting them with tangential information
- **Leave out extraneous information.** "If in doubt, leave it out" is a good rule of thumb
- **Do not hide important information in footnotes or appendices.** Most people will not read them. Minimise footnotes
- **Use an active voice.** A passive voice can hide who is responsible for what and makes the case difficult for readers to understand and analyse
- **Minimise or avoid acronyms and abbreviations**. Readers find it difficult to remember more than two or three acronyms or abbreviations, so minimise the number used, or use none at all
- **Be concise.** Keep sentences and paragraphs short and to-the-point
- **Use topic sentences** at the beginning of paragraphs so skim readers can still follow the story. Do not hide important details in the middle of a paragraph
- **Ensure the case is accurate as possible.** Case writers should double check facts and claims before publication
- **Avoid strongly advocating specific policy positions**. It is better to present the various options and let readers make up their own mind
- **Maintain a detached tone.** Overuse of adjectives, particularly judgemental ones, is discouraged and one should limit the expression of one's own opinions. The writer can let the sources speak through their quotes, however. The objective is to encourage readers to draw their own conclusions.

PART B: CASE STRUCTURE: DECISION-FORCING CASES AND LESSON-DRAWING CASES

There are **two main types of cases**:

1.   **Decision-forcing cases** focus on a key decision point and are left open ended, inviting readers to consider which option the protagonist should choose (i.e. these cases **force** the reader to make a **decision**). Decision-forcing cases sometimes include an epilogue, revealing the actual decision taken along with commentary and analysis.

Decision-forcing cases may be preferred by some teachers because they contribute to class discussion, and engage students in the decision-making process.

2.   **Lesson-drawing cases** present the story of how a certain policy or reform was developed or implemented, including the outcomes of the reform and lessons learned from the process (i.e. these cases **draw lessons**). Lesson-drawing cases often include multiple decision points throughout the narrative, as the actors involved decide how to approach new challenges that manifest over time.

Lesson-drawing cases can sometimes be preferred by practitioners and researchers as the lessons are easily accessible, making these cases more useful to inform decision-making. However, they are also used to stimulate teaching discussions by asking different questions. For example: Did the protagonist make the right decision?

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Suggested structure

Decision-forcing case	Lesson-drawing case
Keywords (5-6 keywords or phrases)	Keywords (5-6 keywords or phrases)
Cite as	Cite as
Abstract	Abstract
Introduction and context	Introduction and context
The Dilemma	The Challenge
Epilogue (optional)	The Response
	Results and Lessons/conclusion

Note: the above structures are only suggestions or heuristics, and case writers can adapt as they see fit. For example, many case writers combine sections to improve the flow of the narrative or follow a more traditional use of descriptive titles for sections. They key point is to set out the problem, the response, and what is learned/can be learned. Please also look at recent cases in the ANZSOG Library for guidance.

Keywords

- Choose 5-6 keywords that capture the main subjects or issues in the case. This assists in searching and highlights key issues for readers.

Cite as

- We encourage readers and researchers to cite our cases. See recent cases for guidance.

Abstract

- Provides a concise overview of the case and entices people to read it in its entirety
- Briefly describes the key elements of the case: the basic context, the problem/issue, the main organisations involved, the central challenges, and for lesson-drawing cases, a brief description of results and lessons learned
- Keep it short and simple. Aim for 150 words.

Introduction and context

The introduction introduces readers to the **immediate problem or opportunity** (for example, *improving access to services, streamlining the budget process,* or *reducing road crashes*). Describe the extent of the problem and put it in context, including its place in time.

This section should start with **a hook that conveys a sense of drama and urgency** and is clearly linked to the case topic. The hook should capture the reader's attention and draw them into the story from the very first sentence. This could include:
- A quote from the main protagonist, describing the challenges they faced
- A dramatic event that shined a spotlight on the problem
- A problem that affects people's day-to-day lives
- Statistics or other details that lay out the extent of the problem
- **Relevant background information** necessary to understand the case study should be outlined. **This is NOT an exhaustive history and should be brief and to-the-point**
- Only include the most relevant and necessary statistics in your narrative
- Relevant active video links can improve attention and understanding, both in the text and in the Teaching Note
- You might prompt readers with questions at key places, but avoid leading questions.

The Dilemma/ The Challenge

This section focuses on the limitations decisionmakers are constrained by in responding to the overarching problem. It could introduce the types of interventions considered by the main protagonists, if there were multiple options available, and provide some of the advantages and disadvantages of each, or allow students the opportunity to do this. Writers should generally aim to include information that was available to decisionmakers at the time. This section could briefly describe challenges that stood in the way of fixing the problem/issue.

The Response (including implementation if relevant)

In a lesson-drawing case, the writer will identify how the protagonist chose to respond and briefly describe the reasons given for this. This section should also outline the options (if any) devised to address the key delivery challenges, depending on the purpose of the case.
This section, can, for example:
- Tell 'an implementation story,'
- Identify challenges and how the protagonists responded.

Results
- Usually only included in lesson-drawing cases, or in an epilogue to a decision case
- To what extent was the problem solved?
- May use the same metrics outlined as indicators of success in the introduction of the case
- Can rely on quantitative research by independent experts, independent research, and/or may present qualitative evidence
- Describes unresolved issues or challenges.

Lessons Learned/conclusion
- What did we learn from this case?
- What went well and why?
- What went wrong and why?
- What could be done differently?

Annexes or appendices

Annexes or appendices are generally discouraged. They may be useful to include additional information and supporting materials that do not easily fit in the body of the case, but be aware most people will not read them. Any critical information should be in the main narrative. Only include annexes/appendices if they are absolutely necessary and:
a. clearly relevant to the case study
b. explained and referenced in the main text.

Examples of annexes/appendices could include:
- Organisation charts
- Diagrams that present complex processes in an understandable way
- Detailed technical information
- Historical information that may disrupt the flow of the narrative
- Timelines
- Financial information in table form
- Maps that convey more information than just location
- Graph

References

Case writers minimise the number of citations, but still need to meet standards of academic rigour. Basic facts do not need to be referenced. Use the *Australian Journal of Public Administration* style guide for referencing.

Teaching notes

Teaching notes should include:
- Key learning objectives
- Intended audience
- Assignments for students to complete before or after class
- Questions to stimulate class discussion
- Teaching approach and/or learning exercises to use in class, for example:
  - Role play exercises, with groups of students representing different stakeholders
  - Small group discussions
- Suggested time management plans for class exercises
- Active links to additional readings or videos
- Key lessons
- Feedback
- What happened next, if appropriate and/or available.

Revisions and edits

All ANZSOG cases are revised by at least two referees and the Case Library Director. Writers should expect to carry out significant revisions. In addition, writers should:
- Double check facts or claims
- If appropriate, seek external advice
- Ensure that spelling and grammar are accurate and consistent throughout. Use Australian spelling
- If possible, before submission, test the case and teaching note in a teaching environment and adapt based on feedback from students and/or teachers.

PART C: ETHICS, ETIQUETTE, AND POLITICAL SENSITIVITY

- Follow your organisation's guidelines regarding human ethics and informed consent for interview participants
- ANZSOG is a **non-partisan organisation**, and cases should reflect this. Avoid emotive and judgemental language use. Cases are used to learn, not pass judgement
- Research that is relevant to Māori and Aboriginal and Torres Strait Islander peoples is welcomed, provided it is conducted in an ethical and respectful manner.[1] ANZSOG encourages research conducted through Indigenous Knowledges, including the use of Indigenous research methods, and appropriate terminology. External advice should be sought from Māori, Aboriginal, or Torres Strait Islander peoples on appropriate research methods and terminology if uncertain
- Cases should present different viewpoints and sources using, for example, quotes from interviewees, media statements, or publicly available reports, to triangulate findings. There may be no final agreement on what happened, and this should be acknowledged
- Interviews are recorded only with the participant's approval
- Anonymous quotes should be avoided if possible, but anonymity granted if requested
- Attributed quotes and text should be checked with the participant, amended as requested, and used only with approval
- Writers may share the case with interested parties for the purposes of fact checking and feedback. Interested parties may include those discussed or potentially impacted by the case's publication. While their perspectives are considered, interested parties do not have the right of veto. It is important to highlight major points of contention with the Case Library Director
- While ANZSOG provides independent research, it must also maintain ongoing relations with its member governments. It may consult to ensure there are no major legal or other concerns regarding publication of a case, and if necessary, negotiate changes with the case author
- ANZSOG reserves the right to not publish a case, or parts thereof
- After the final version of the case is published, authors may share the case with individuals and organisations who assisted to show appreciation, and to expand the utility and readership of the case.

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[1] For more information, see *Respect for Indigenous peoples and cultures: ANZSOG Learning and Action Protocol*: https://www.anzsog.edu.au/preview-documents/publications-and-brochures/5223-indigenous-protocol-final/file

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Feedback
To assist with continual improvement, we'd greatly appreciate your feedback and suggestions for improvement. To do so, please email caselibrary@anzsog.edu.au with the name of the case and your comments. Many thanks in advance.