ANZSOG Case Program

Guide for ANZSOG Case Program writers

1.   The case writing framework

ANZSOG case studies aim to be engaging, informative and relevant.

- The ideal length is between 500 and 4,000 words (2 to 15 pages).

- The writing style is active.

- Sufficient context information is included for readers unfamiliar with the circumstances or jurisdiction to engage in an informed discussion.

- 'Evidence not hindsight'. Give a balanced presentation of the facts, without editorialising. Include opinions as quotes from interviewees.

- 'The answer is not in the question.' Analysis emerges from discussion.

- Fixed in time, using the past tense.

A simple framework that can be used to develop a case includes:

- A short opening paragraph that identifies and locates the key decision-maker, draws in the reader, sums up the main elements of the problem situation, and highlights the question or dilemma being faced.

- 'Macro' background context such as peculiarities of the jurisdiction, pressures and constraints such as public disquiet over law and order, impending elections, comparative information 'the first', the 'largest', 'half of all…'.

- 'Micro' background context such as details of the department or organisation, key people, length of time in role, relevant past experiences such as leading disaster recovery.

- Problem and options: Provide detail of the dilemma and options that have been tried/are being considered to resolve it; time pressure or deadline.

- Conclusion: recap of the opening paragraph situation, pointer to the decision or action that is needed.

Note: with a prospective case, which 'cuts' the story part way through, the writer will need to know the full story, even if some of it is told as a sequel or epilogue.

2. Timing and sequence

One of the major obstacles to informed discussion is confusion over the sequence of events recounted in the case study.

- Early research should include compiling a time line for the writer's own information, and possibly as an exhibit when timing is complex.

- It is important to know about key external events such as elections, as well as the sequence of the case story.

The case discussion considers how to manage a situation with the available knowledge even if it is limited or confusing. Decisions cannot be made with the benefit of hindsight; be careful not to include events occurring outside the timeframe.

3. Style guide for content

Quick tips	
	• **Abbreviations**: avoid excess full stops
	• 'Alphabet soup': restrict the use of **acronyms**
	• **Active voice** engages readers
	• **And** not &
	• Master your **apostrophes**
	• Be sparing with **brackets** (parenthesis)
	• Limit **CAPITAL LETTERS**
	• **Colons** and **semi-colons** each have their place
	• Use **commas** with caution
	• Clarify which **currency**
	• **Dates**: day month year
	• **English standard spelling** (some exceptions)
	• How and when to **hyphenate**
	• Explain local usages for **international readers**
	• **Macrons** for Māori
	• **Numerals** and percentages
	• **Quotations marks**: 'single' is the default use
	• Keep **sentences** clear and concise
	• A **singular** subject needs a singular verb: a **plural** subject is followed by a plural verb
	• Use past **tense**
	• Twelve hour clock for **time**
	• Footnote **translations**
Abbreviations: avoid excess full stops	• New Zealand should not be abbreviated, always written in full.
	• Use Co for Company and Ltd instead of Limited. There should be no full-stop in either case.
	• The abbreviations of Mr, Ms, Mrs and Dr do not require full stops to punctuate.
	• Use 'such as', 'for instance' and 'for example' as alternatives to 'etc', 'i.e.' and 'e.g.'.

'Alphabet soup': restrict the use of **acronyms**	- Only use acronyms when titles will occur frequently. - Always write titles in full with the first use, giving the abbreviation or acronym to be used subsequently in brackets: The Australian Labor Party (ALP). The full title may be used again later to refresh the reader's memory. - Do not introduce an acronym if a title will only be referred to once or twice.
Active voice engages readers	Tell the story in a lively and immediate way using the active voice 'Diane spent her money on a car and a trip to Europe', rather than passive, 'with the money, a new car was bought and a trip taken'.
And not &	'And' is always preferable to '&' (ampersand) which should only be used if it is formally part of a title.
Master your **apostrophes**	Use to create possessive forms, contractions and plurals. 'It's' is the possessive of 'it' versus 'its' which is short for 'it is' 'Consultant's report' is the report of one consultant versus 'consultants' report' which is a report belonging to several consultants 'Your' is possessive of 'you' versus 'you're' which is the shortened version of 'you are'. When referring to a time period such as the 1990s do not add an apostrophe as the date is not possessive.
Be sparing with **brackets** (parenthesis)	- Use to include additional or explanatory information in a sentence. - Information vital to the construct of the sentence should not be put in brackets. If in doubt, restructure the sentence/s to make interpretation easier.
Limit **CAPITAL LETTERS**	Use capitals when writing titles: 'the Deputy Director, Mr Daley'. But not when writing generically: 'the deputy director was not amused'.
Colons and semi-colons each have their place	Use a colon: - before a list or an explanation that is preceded by a clause that can stand by itself. For example, 'There is only one thing left to do now: confess while you still have time.' Use a semi-colon: - to sort out a large list - to separate closely related independent clauses. For example, 'I seldom leave work this early; I'm afraid I would miss out on something.'
Use **commas** with caution	A good rule is to only include a comma when a pause in the sentence is necessary: - to avoid confusion - in a list - to set off quotes: 'It's ridiculous,' he said, 'to expect.....
Clarify which **currency**	If not in US$ then footnote first use, for example: 'All figures in Australian dollars.' If necessary within the text format as AUD$, A$ or NZ$.
Dates: day month year	- Dates should be written as day month year: '28 October 1965'. Where the day of the week is included, a comma should be inserted: 'Friday, 28 October 1965'. - Span of dates should be written as '2004-07'.

	• The financial year is usually expressed as '2008/09'.
English standard spelling (not US): 'ise' not 'ize'	• Use 's' not 'z' for words such as 'organisation' Exceptions: • The Australian Labor Party (in all other uses 'labour'). • 'Program' is the standard Australian spelling (hence the ANZSOG Case Program) but cases originating in New Zealand use the English spelling 'programme'. Problem words include: • Principal = the main. Principle = statement of belief. • Licence = noun License =verb.
How and when to hyphenate	• Apply when two words are used as an adjective, eg five-yearly intervals, when a prefix is required 're-engineer', and for suspended compounds such as '12- and 15- year contracts'. • Do not use for words normally joined such as logbook, unbundle, cooperation and ongoing. • Be aware of the context: 'a long-term solution' versus 'For the long term'.
Explain 'local' usages for international readers	• Footnote an explanation for common Australasian words and phrases such as 'hoon', as well as unique Australian ('peak body'), or New Zealand ('Vote Health') usages.
Macrons for Māori	• Use macrons if available for those Māori words that require it. Otherwise the editor is able to apply macrons.
Numerals and percentages	• Numbers up to and including ten should be written in words. All numbers included in footnotes, numbers in dates and numbers relating to legislative provisions are exempt from this rule and should be written in numerical form. • Where a number begins a sentence, write it in words. • Percentages should be expressed as '7%' or 'seven per cent'.
Quotation marks: 'single' or "double"?	• 'Single quotation marks' is the default. • For quotations within a text use 'single quotation marks'. • Use single "double quotation" marks to identify a quote within a quote, when referring to a journal article or report within the text: 'he described them as "out of control".' • For a full sentence quotation marks should be closed outside of punctuation: 'They left us behind.' • When quoting only a phrase, the quotation marks will be around the text itself but within the punctuation: He said they 'took the easy option'. • When text is excluded from a quote (usually for space reasons) use ellipsis '...' (three sequential full-stops) to indicate where the text is missing. • When inserting explanatory words to clarify a quotation or statement use square brackets: 'The whole [Cave Creek] business was a disaster.'
Keep sentences clear and concise	• Break up long, complex and clause-filled sentences into several shorter ones.
A singular subject needs a singular verb; a plural subject is followed by a	• An organisation is singular and is therefore followed by a singular verb, 'the government was concerned'. • General usage seems to be that the word 'staff' is followed by a plural verb,

plural verb	'the staff' by a singular. • Some common uses are, 'the group was', 'management was' and 'managers were'. • Always clarify whether the subject of the sentence is singular or plural. For example: 'The Department had to move forward knowing that the future [single subject of the sentence] for both the training programs and the loans schemes was very uncertain.' 'The reasons [plural subject] for failure to complete the assignment were many and varied.'
Use past **tense**	• Fix the case at a point in time.
Twelve hour clock for **time**	• 12 hour clock: 10:00am, 2:15pm
Footnote **translations**	• All expressions in languages other than English that are not part of common usage internationally must be translated into English in footnote; Māori words such as iwi and whānau.

4.   Formatting guide

Once a case study has been approved for development, ANZSOG will provide the writer with a unique identification number to be used on all versions during the writing and review process. When the case has been signed off and is ready to be published, the Case Program will give it a registration number indicating the date of publication, and whether there are other parts or a teaching note.

The guide below gives instructions for formatting all aspects of the case study except the header, footer, and registration case number, all of which will be applied by ANZSOG at the final editing and quality check before lodgement on the website. The Case Program will add a version date, which will be changed if any amendments are made after the case is first published.

While it is not compulsory for writers to follow this format, doing so will give the writer an idea of the finished 'look' and length of the case. It may suggest the need to edit excess information out, or split the case into parts to make it more readable.

Headings	Headings in Calibri Light font bold and capitalised only at first word and when proper nouns are included (colour RGB 0/159/214). • Main heading in Calibri font bold 22pt, left justified. Use a colon to separate a two-part heading. • Subheading in Calibri Light font bold 14pt, left justified. No colons. • Second Subheading in **Calibri Light** font bold 12pt, left justified (mainly used for teaching notes but available for case study use). • Exhibit section in Calibri Light font bold 14pt, left justified. Usual practice is not to have a subheading (such as 'Introduction') between the main heading and the first paragraph of text.
Body of text	• Calibri Light 11pt • Left justified
Line spacing	• 10pt after main heading (Case Name) • 6pt before and 6pt after for Case ID/Number • 10pt before and 6pt after for subheading and second subheading • 0pt before and 6pt after for body of text

Margins	Front page:
	- Top: 1.5cm
	- Bottom: 3.0cm
	- Left and Right: 2.54cm
	Body of text:
	- Top: 2.54cm
	- Bottom: 2.54cm
	- Left and Right: 2.54cm
Footer	This is to be displayed in Calibri Light 9pt, on the front page above any footnote details. It will be formatted at the editing stage. Information needed:
	Author
	Academic institution
	Source of information
	Names of those consulted. If names have been changed (not encouraged) include, as appropriate, a qualification such as: The names of the company and individuals have been changed to protect the privacy of all those concerned.
	The case study was written by [name] [institution]. It is intended as a basis for class discussion rather than to illustrate either effective or ineffective handling of a managerial situation.
Footnote and footer	- Calibri Light 9pt
	- Left justified
Page numbering	Number of page should be shown in numerical form, left justified at the bottom of the page. Does not show on the first page. The second page should be numbered '2' and so on.
References material	Use footnotes rather than citations. The number should come after all punctuation within the body of the text. Additional reference material may be listed at the end of the case or provided as a separate exhibit.
Exhibits	- Reference within the body text, should be italicised: see *Exhibit 1.*
	- Number in the sequence that they appear in the text.
	- Calibri Light bold 14pt for exhibit titles.
	- Always indicate source of the exhibit, using Calibri Light 10pt at the end.
Display quotes	- To be indented 6mm
	- 6pt before and 6pt for quote
	- Calibri Light 10pt
Bullet points	Use sparingly within a case. If needed include the full bulleted list as an exhibit and summarise or briefly refer to it within the text.

5.   Case study 'products'

Multi-part cases	Normally a 'Part A' case is the primary teaching tool, and is designed to be circulated for students to read ahead of the discussion session. With complex subjects the material may be further divided into Part B and even Part C, each of which can be used for teaching in its own right and may either be handed out part way through the session or provided as pre-reading for another discussion session.
Sequel	A sequel 'signs off' the case, telling what happened next, in sufficient detail that it could be used for a separate discussion. It can be distributed during a teaching session or at the end if no further discussion is needed.
Epilogue	An epilogue is a short (maximum two-page) update of 'what happened next'.
Vignette	A short case, maximum length four pages, which can be read in class before discussion.
Update	An additional case part which updates the previous information. The earlier case remains on the website.
Rework	A new, often but not always abridged, version of an existing case, which may be replaced by the rework, but usually remains in the case library as an option for teaching use.

6.   Teaching notes

ANZSOG strongly encourages case writers to prepare a teaching note to accompany their case. Research by The Case Centre has shown that cases with teaching notes are used significantly more often.

A pro forma teaching note can be found at casestudies.anzsog.edu.au/teaching-interactively/teaching-notes-and-teaching-plans. Teaching notes can be presented in a variety of ways to assist with teaching of the case. They normally include some guidance as to the use of the case, including possible questions or assignments, plus relevant research or theory to underpin discussion. Most teaching notes also include a list of references.

It is important that teachers are aware of any 'recent developments' around the topic of the case, for example a new audit report, or a government decision to reverse an earlier determination. Keep an open file for news items or audio-visual material that updates the case, and consider extending the original timeline.

Teaching notes prepared for the ANZSOG Case Program will be formatted with the standard header, footer, identification number and version number.

7.   Referencing guide

Single author book	Surname, Initials (Year of publication). *Title*. Edition. Place of publication: Publisher
Multi-author book	Surname, Initials. Surname, Initials., & Surname, Initials (Year of publication). *Title*. Edition. Place of publication: Publisher
Edited books	Surname, Initials, ed. (Year of publication), *Title*. Edition. Place of publication: Publisher
Book articles	Surname, Initials (Year of publication), 'Article title'. In [book title], edited by Surname, Initials. Place of publication: publisher, pp. starting page number-end page number
Periodical articles and newspapers	Surname, Initials (Year of publication). 'Article title'. *Periodical title,* vol number: starting page-ending page
Conference papers	Surname, Initials & Surname, Initials (Year of publication). 'Article Title'. Paper presented at the conference title, conference location, month

Report	Organisation (Year of publication). 'Report title'. Place of publication
Electronic	[author] [date of document] [title of document] [version number if applicable] [name of the sponsor of the source] [date of viewing] [URL]
TV and radio programmes	Programme. Television network or radio station. Day, Month, Year
Personal communication	Surname, Initials. Personal communication. Date.
Further reference to previous	If a publication is to be referred to frequently, style preference is to give it a distinctive short name or acronym within the first listing and to use this subsequently: Finlay, J R, 2001 'Revelations from the ballot box', hereafter 'Finlay'. Note that 'ibid.' is only used when making another reference to the reference directly above. 'Op cit.' means that the reference is the same as another reference given above, but not directly above.

8.   Other resources

See the ANZSOG Case Program website for additional resources for both teaching and writing

ANZSOG Case Program brochure

The Case Centre