What We Have Learned Along the Way:
The Significance of Teaching Notes in Case Writing

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In Vol 35 (2) we wrote about what we had learned as editors regarding case research, writing, and publishing in this journal. Throughout that article, we focused specifically on what we thought stakeholders might be interested in reading about the art and craft of case research from the editors’ view. We were appreciative of the positive comments about that article, and we received questions that focused on the teaching note. So, we decided that stakeholders might be interested in reading about what we learned along the way as it pertains to the teaching note, and we have referred to teaching notes that accompany cases in the current and past publication issues. We hope you will find valuable points to assist you as you develop and improve the craft of writing excellent teaching notes.

The Teaching Note

While teaching notes are not published, they are critical for our mission as a journal published by the Society for Case Research. Our mission is (Journal mission, n.d.):

To provide a continual flow of effective up-to-date cases to promote excellence in teaching.

Cases are real life, true stories. The events really happened, and case researchers have conducted extensive interviews and researched secondary sources so to write a timely, interesting case. The same is true for the teaching note. Case researchers write a teaching note with the findings from their systematic study of case events, pertaining theory, and environmental scan of the organization under study. The difference is that the teaching note is not published, but it is made available to instructors who wish to use a select case in their course.

The purpose of the teaching note is to serve in class instruction and, as such, it is a critical part of the case writing process. Many case researchers write parts, if not all, of the teaching note prior to writing the case. Then, the teaching note becomes a reference as the writers outline and develop the case story. Each part of the teaching note helps the case researcher focus on the educational outcomes she envisioned for the student reader.

As editors for the journal, we know the case is ready for publication when the reviewers have given their best advice to the writer regarding the case
and the teaching note, and the writer has responded to these comments thoroughly. We noted that (Cellucci & Peters, 2013, 1):

We succeed when the authors’ case study is complete and the teaching note is thorough . . .

Naumes and Naumes (2012) assert that the primary users of teaching notes are not only the instructor, but also the case writer, and evaluative readers (i.e., reviewers of the case as well as reviewers of an academic’s work who is undergoing tenure and promotion). In a 2016 survey of Society for Case Research (SCR) members, most (87%, n=51) indicated that they used the teaching note to help them prepare for class, and they were more likely to use four items of the teaching note in their classes (Kennedy et al, 2017, 16):

- The discussion questions (74%, n=43);
- The answers to discussion questions (76%, n=44);
- The epilogue (60%, n=35), and
- The student learning outcomes (60%, n=35).

Thus, for case writers who are interested in improving their skills, these four aspects are important to address fully so to ensure a robust, usable teaching note. Nonetheless, an excellent teaching note also includes the following to ensure thoroughness in assisting the instructor.

**Case Overview**

A case overview gives a brief summary of the major points about the case as well as identifies in which courses the case is a good fit. We have several teaching notes in this issue that provide a great case overview and also identify several courses in which they are a fit. For example, 23andMe: Future of Personal Genomics Services Business? (Whaley & McGuire, 2018) is both relevant to graduate and undergraduate courses in a variety of areas (strategy, business policy, ethics, entrepreneurship, product marketing, decision-making, and technology management). Another teaching note, To Expand or Not: Strategic and Cultural Concerns in a Family Business, by Burch, Tocher, and Krumwiede (2018), also covers numerous topical areas. This teaching note spans organizational behavior, management, leadership, and small business/family business courses because of its focus on culture and decision-making. However, as SCR does not publish the teaching notes, copies of teaching notes may be obtained by contacting SCR’s executive director.

**Research Methods**

Teaching notes require that research methods are clearly identified and explained. For example, The Miami Dolphins’ Offended Lineman: Richie Incognito vs. Jonathan Martin, by Lloyd and Davis (2018), is based completely off of secondary sources, which are cited in the case and identified as such in the teaching note. In contrast, PinnacleJobs.com: To Sell or Not to Sell (McGurr &
Mull, 2018), is based off of primary, field research via a set of interviews with employees from the company. This is stated in the teaching note, along with information about how the decision maker and company name are disguised. It is important to be specific about the research methods so that informants who have authority to speak for the organization have reviewed the case and given permission for its publication. Consequently, instructors know that quotes are real and case facts are true and accurate. Informants are stakeholders of this journal as well, and we work to ensure that they are treated ethically as are the journal’s other stakeholders—authors, reviewers, students, and SCR members who have put their trust in our work as editors (Cellucci & Peters, 2013).

**Learning Outcomes**

Learning outcomes provide the instructor with information about what the student should be able to demonstrate after reading and studying the case and completing an instructor’s assignment. We rely upon Bloom’s cognitive taxonomy that was developed to (Bloom, 1956, 7):

> Deal with recall or recognition of knowledge and the development of intellectual ability and skills.

To elaborate, Bloom’s taxonomy includes six major classes regarding cognitive learning with each class indicating a higher level of learning. The six are knowledge, comprehension, application, analysis, synthesis and evaluation (Bloom, 1956). We understand the importance to instructors for case writers to identify learning outcomes and thus, these outcomes are included in the teaching notes as well as in the published summary. For instance, the teaching note, Deciphering Governmental Financial Reports (A): The Case of a Jefferson County, Alabama Resident (Foust, Smith, & Hogg, 2018), does an excellent job of scaffolding the learning objectives. The learning objectives increase in order of complexity, according to Bloom’s taxonomy, in that they first ask the students to identify information, then assess the financial condition of a local government, and finally, evaluate the transparency of the local government’s financial reports. In addition, the teaching note, How Did this Decision Become Mine? (Powell & Bolinger, 2018), provides an excellent set of learning outcomes that increase in complexity. These learning outcomes require students to identify, describe, analyze, and evaluate the problem presented in the case.

**Discussion Questions**

As case writers develop questions, we recommend they keep in mind the information the student has read in the case as well as the outcomes identified. Moreover, students must be able to answer the questions with the information provided in the case. It would not be acceptable to ask a student about legal issues applied to the case, for instance, if the case did not have information about said issues. A caveat to this rule, however, is that if the authors know the question is pertinent to student learning and the discussion
on legal materials (continuing with this example) would interrupt readability of the case, the author may include this legal discussion in the teaching note section entitled, “Other Pedagogical Materials.” For instance, the teaching note for the case, DeVos’s Changes to Title IX Enforcement (Osland, Clinch, and Yang, 2018), focuses primarily on the policy aspects within the context of a university. The learning outcomes and questions provided examine the impact of the policy on the university and what the school can do to abide by standards being put forth by the federal government. At the end of the teaching note, however, the authors present an extensive section of other pedagogical materials. This section contains extra questions, answers, and materials if an instructor would like to utilize the case to highlight particular legal issues in class.

**Answers to Discussion Questions**
For cases that have been class tested by case researchers prior to publication, authors have been known to select “A” work by a student and include his answer in the teaching note. If a student’s work is included in the teaching note, we put forth that the student has earned authorship status, and the case researcher’s teaching note is enhanced by answers to discussion questions from student input. The student learns about case research and has earned a publication while a student.

It is important to note that class testing a case prior to submission for publication review is not a requirement for publication in the *Journal of Case Studies*, but solid answers to discussion questions must be offered that will help instructors measure student performance on their ability to apply concepts, theories, formulas, laws, etc. New Balance: Fanning a Video Firestorm by Poulton, Chanland, Burson, and Brooks (2018), for example, provides a rich set of questions and answers for the instructor using the teaching note. They provide five questions, which is an optimal number, because it is not too few yet also provides several different types of questions from which the instructor can choose. Their questions are also particularly rich because they integrate models and theories that can be utilized to help the students with the analysis.

**The Epilogue**
An epilogue is not required, but the 60% of SCR members who responded to the 2016 survey about uses of cases in the classroom replied that they specifically look for an epilogue in the teaching note (Kennedy et al, 2017). In the case “Emergency!! Or is it?” Svagr (2015) highlighted the experience by psychological therapists when they brought a patient exhibiting suicide ideation to the emergency department seeking help. The epilogue of this case allowed for students to become aware of the importance of protocols and policy in emergency departments for behavioral health issues. Also, the telling of the rest of the story in the epilogue re-emphasized a critical thinking component for students aspiring to be future healthcare professionals regarding the importance of policy and protocol.
Epilogues are interesting and informative as they tell the rest of the story, highlight important points that are learned after the case story ends, and explain what happened (Foust et al., 2014).

The References
When referencing work cited, it is important that authors follow the guidelines regarding referencing. We have had authors ask us to “fix” the referencing for them or tell us they will correct the referencing once they receive a publication acceptance for their case. Neither response is appropriate. We strongly recommend case writers submit the teaching note with the references in the proper format (SCR Manuscript Guidelines for Authors. n.d.). Also, we recommend you peruse any of the published cases in this issue. Each has followed the proper referencing and may serve as an example.

Other Pedagogical Materials
The section is not required to be included in a teaching note, but it may be a valuable place for case writers to elaborate on topics not developed in the case but are needed to provide necessary information for the student to answer the discussion questions well. Theoretical explanations, calculation handouts, and formula lists are examples of what instructors will find in this section.

The Reviewer and the Teaching Note
We have found that good reviewers take the position of student and colleague as they review the teaching note. They offer constructive advice and criticism regarding clarity, thoroughness, and interesting ideas of how to use the case in class. Overall, the reviewers assess whether or not the teaching note adds value to the instructor’s responsibility regarding class instruction and appropriate coverage of the material. The reviewer evaluation form has evolved to help spur the reviewer to be mindful of their responsibilities. (See www.sfcr.org for a copy of the reviewer form for the teaching note).

At the SCR Summer Workshop, held annually and hosted by various University campuses, case writers have the opportunity for their teaching note to be reviewed by other case writers in a collegial and positive environment. Following the workshop, many case researchers resubmit their cases and teaching note to one of SCR’s journals (Business Case Journal, Journal of Case Studies, and Journal of Critical Incidents). They report that the workshops helped them become better writers of the Teaching Note. (See www.sfcr.org for details about submitting for publication consideration and summer workshops). We encourage new case researchers to attend as they learn by serving as a reviewer and receiving constructive criticism from their
colleagues. However, attendance at a summer conference is not a requirement for publication in any of SCR journals.

Editorial Service and Future Directions

Our service as editors has provided us valuable lessons regarding excellence in teaching note writing. We have been privileged to read, critique, and work with authors on their cases and teaching notes. Instructors who use teaching notes refer to the value added to the learning experience. And that is what case writers, SCR members, and we wanted—to provide cases to promote excellence. Thank you for allowing us to be a part of this experience.

References


Cellucci, L.W., Peters, C., and Young, J. (2017). What we have learned along the way: Case research, writing, and publishing in the Journal of Case Studies. Journal of Case Studies. 35 (2), 1-10.


