

JFCR FORMAT REQUIREMENTS

(Updated 2022)

Although manuscripts are accepted *for review* in any format, we highly recommend that manuscripts submitted to the *Journal of Finance Case Research* be formatted according to the following guidelines. Manuscripts adhering to these guidelines are more likely to earn favorable review, since they already are in the format that will be required before final acceptance, and editorial preference will be given to those documents which are obviously more compatible with the journal format. For *conference proceedings*, manuscripts need to be formatted according to each individual conference's requirements. Please note, also, that otherwise acceptable manuscripts that do not or cannot fit the journal format standards will not be published.

For insight into the editorial philosophy of the JFCR, read "What is Finance Case Research?" from a prior JFCR issue: <http://www.jfcr.org/editorial.pdf>

Manuscript submission is electronic ONLY, via email. Send manuscripts to

editor@jfcr.org or michael@uhcl.edu

*****BEFORE ANYTHING ELSE*****

TURN OFF ALL AUTOFORMATTING IN MS WORD

This is different for different versions of Microsoft Word, but it is a very important step. *Unformatting* already formatted copy is a great challenge in MS Word. We have found it easier to save a formatted document as plain text, then open it with MS Word with Autoformatting turned off. We do not have copy editors to do this on behalf of submitting authors, and the editors do not have time to work this out ourselves.

GUIDELINES

What to submit:

Please send together a 1) separate file containing the case, a 2) separate file containing the teaching note, and file consisting of a 3) single page with the full names, titles, affiliation and contact information of each author. You may include other items such as sample solutions (with permission) and spreadsheets or other work, but these three are required at a minimum.

Other Considerations

1. File names: Save your files as the lead author's last name:

For the case: smith.doc

For the teaching notes: smithTN.doc

For any other files associated

with the case: smithA.doc, smithB.doc, etc.

2. Page limitation: For the *Journal*, there is no page limitation. For conference proceedings, please adhere to each individual conference's requirements. Please keep in mind that wordsmithed cases are much more likely to be accepted – please proofread carefully for meaning and content and remove excess words when possible.

3. File format: Use Microsoft Word.

4. Typeface: Use Times New Roman regular font in 12 point. For emphasis, use italics. Boldface can also be used sparingly for emphasis. Do not use underlines.

5. Margins: Use one-inch margins all around.

6. Spacing: Single space all text in the document. Double space before and after headings, and between citations in the references. DO NOT double space between paragraphs.

7. Indentation: Indent all paragraphs 1/2 inch.

8. Justification: All regular text should be justified with straight margins (not ragged on the right).

9. Commands:

- *DO NOT* use footnote and endnote functions. Rather, use superscript text to cite (like this¹), and *type* notes at the end of the case.
- *DO NOT* note references. Instead, use APA style for references within the text (Jones, 2001).
- *DO NOT* use headers or footers other than page numbers centered at the bottom of each page (including the title page).
- *DO NOT* use multiple sections in the documents – each document should only have one section. The only exception to this should be for Landscape-format tables – landscaped tables must be in their own sections, and any following tables in Portrait format must have their own section, as well.

10. Title of manuscript: All caps, bold, 18 point, centered, two lines from the top of the page, Dark Blue.

example:

THIS IS MY PAPER'S TITLE

11. Authors: *On review versions*, type asterisks in place of the authors' names and affiliations. *For final versions*, type author names followed by comma and affiliation, in upper and lower case two spaces below the title, in 12-point bold, centered, Dark Blue:

**John Doe, USA University
Jane Dough, Corporation, Inc.**

12. Headings: Bold and Center major headings in 12 point, all caps. *One* level of subheadings is allowable. If you use subheadings, they should be left justified, upper and lower case, bold. No color on headings and subheadings.

THE BOARD MEETING

Initial Arguments

13. Body: Create an unlabeled (no heading) introductory paragraph with a brief description that introduces the case and gains the reader's interest. The introductory paragraph should be in italics. Double-space afterward and begin the case, in normal font. Use a heading, if desired, between the introductory paragraph and the first paragraph of the case.

14. Formulae: JFCR gives substantial latitude to authors for the creation of formulae appropriate for their cases. We ask that formulae be rendered with a professional look. If it is possible for us to read formula renderings from Microsoft Equation or a similar equation editor, then formulae can be inserted as needed into the text. Other arrangements can be made, if authors have the need, including typesetting services or scanning and pasting (for a fee) that we can arrange. Equations should be tabbed 1/2 inch and numbered at the right margin in sequence of appearance. The equation should be in black and the equation number should be in bold:

$$\beta_j = \frac{COV_{j,m}}{\sigma_m^2}$$

Equation 1

15. Illustrations, tables: These may be labeled figure, table, or exhibit, whichever is appropriate. Number each category independently. Financial statements and summaries should always be labeled as *exhibits*. Drawings and graphs, photos, pictures, etc. should be labeled as *figures*, and tabular data may be labeled *table* or *exhibit*. Color may be used in illustrations, drawings, photos, or graphs if it looks professional and adds to content or presentation. Flashy or ill-advised use of color is discouraged. Remember that these cases will likely be printed by the user in grayscale, and that this may obscure the color highlights. Label cells may be boldfaced, if desired. Hide gridlines. Single space between the label and the beginning of the object or table. *Do not* re-label the exhibit *within* the object or table:

Exhibit 1. Delang Corporation Return Distribution

	Probability	Return
Boom Economy	0.23	24%
Moderate Economy	0.54	16%
Recession	0.33	4%

The look of tables should be consistent throughout your case. Simpler, cleaner tables are highly preferable to complicated ones. Vertical format tables are highly preferable to those the reader would have to view by holding a page horizontal. Do NOT place more information on a table than can be clearly read. Tiny font sizes are ineffective for communication and aesthetically undesirable.

16. Graphs: Create graphs as simply and practically as possible. Although color may be used to differentiate multiple items, we also recommend the use of dotted lines or symbolic indicators, since these cases may be printed by the user in grayscale. To see if this is a problem, just print the file in grayscale and see if the differentiation of multiple items is obvious. If not, use some manner of grayscale differentiation.

17. References and citations: References should be prepared and cited using APA (American Psychological Association) guidelines. Three exceptions: 1) use italics instead of underlines; 2) capitalize properly within titles; and 3) avoid references or citations involving online URL's that are not permanent.

Use the bold centered heading "REFERENCES". Double space between citations and hanging indent by one-half inch. Use Dark Blue color, even on the heading:

REFERENCES

Grove, Hugh, Tom Cook, and Jon Goodwin (2001). Hermes Corporation: Joint Venture Financing Case. *Journal of Finance Case Research* 2(1), 1-20.

18. Hyperlinks: Embed full location address for links. *Make sure they are permanent.*

19. Teaching notes: All submissions should include a teaching note, *prepared in a separate file.* Begin the teaching note with "TEACHING NOTES" in Dark Blue, and a repeat of the title and authors. See Item 11 for review versus final versions.

TEACHING NOTES

THIS IS MY PAPER'S TITLE

**John Doe, USA University
Jane Dough, Corporation, Inc.**

Continue the teaching note with a case description and a case synopsis. The description is designed to inform the potential user about standard technical aspects of the case, while the synopsis should be written to capture the potential user's interest. Use italic blue font:

CASE DESCRIPTION

The primary subject matter for this case concerns (describe the subject). Secondary issues examined include (list as many as the case contains). The case has a difficulty level appropriate for (describe the target level: freshman, sophomore, junior senior, 1st year MBA, MS or 2nd year MBA, doctoral, etc. Use more appropriate categories if these are inadequate). The case is designed to be taught in (indicate how many) class hours and should require (indicate how many) hours of outside preparation by students.

CASE SYNOPSIS

(In this section, present a brief overview, max 300 words. Be creative. This section sells your case- it convinces the professor to use it.)

After these required sections, present teaching approaches, suggested questions, successful strategies you have used, when in a particular course to use the case, special teaching features, ancillary links or materials (**make sure links are permanent**). Instructor notes are an important part of the review.

Prepare the teaching notes keeping in mind that you may be communicating to professors without substantial teaching experience, without direct familiarity with what you are familiar with, without access to information you may access easily, and without academic or practical background experience that you may have acquired in your career. The teaching notes should

minimize prep time for potential users.

Epilogues are usually of interest to students. They have a natural curiosity as to whether the characters in the case did what they came up with, or if other approaches were used, and what the outcome(s) were. Feel free to present an epilogue for the case.