

Journal of Financial Education Editorial Policy for Cases

Case Content

The JFE has a strong preference for cases based on real companies and real situations with epilogues of what really happened that are field researched rather than just written with publicly available information. Nevertheless, the journal will consider cases that are somewhat contrived only if they have the potential to provide exceptional learning opportunities.

Secondary data source cases will be considered if they provide exceptional learning opportunities. Such cases still have a real (but maybe inaccessible) decision maker in a real company with a real epilogue, concerning the key decision of the case. Thus, “cases” from secondary sources with only “you” (the student) as the decision maker and no actual epilogue are unacceptable. Such “cases” are really end-of-chapter exercises and should try to find a home in textbooks or less rigorous “case” books or exercise manuals.

Teaching Note

Cases must be accompanied by a comprehensive Teaching Note that includes at least the following elements:

1. A brief (one-page maximum) synopsis of the case.
2. Identification of the intended course(s) and levels, topics covered in the case and its specific learning objectives. Authors should identify any associated readings or theoretical material that instructors might assign to students as necessary background for the assignment of the case.
3. Suggested teaching approaches as well as the expected flow of discussion, role plays, and debates, etc. Authors are encouraged to test their cases in their own classes before submitting them to the JFE.
4. Assignment questions for students, with a complete analysis of each question that demonstrates application of relevant theory to the case—including Excel spreadsheets where appropriate. Authors should highlight analytic points that only by the best students would raise; for example, discussion points that might differentiate an "A" grade on a written assignment.
5. Disclose any disguises of company information or persons in the case. Indicate the relationship between the case author(s) and the company.
6. Include an epilogue or follow-up information about the decision actually made at the end of the teaching note.
7. Attach all Teaching Note exhibits at the end of the TN.

Review process

All manuscripts (both the case and the teaching note) are double-blind refereed by ad hoc reviewers . Most submissions require at least one round of revision before acceptance. Our target time frame from submission to author feedback for each version is 45 days.

Distribution of published cases

The right to reproduce a case in a commercially available textbook, or instructor-created course pack, is reserved to the Journal of Financial Education and the authors, who share copyright for these purposes.

Case Format

Cases and articles submitted for review may be single- or double-spaced. All cases should be written in the past tense except for quotations.

Figures and tables should be put at the end of the case. Each exhibit should have a number and title as well as a source. Wherever possible, citations should be embedded in the text as end notes, with bibliographic information restricted to a "Reference List" at the end of the case in APA format.

In submitting this case to the *Journal of Financial Education*, I (we) certify that it is original work, based on real events in a real organization. It has not been published and is not under review elsewhere. Copyright holders have given written permission for the use of any material not permitted by the "Fair Use Doctrine." The host organization has assigned a release authorizing the publication of all private information gathered with understandings of confidentiality.

Manuscript Submission

Submit a case manuscript and Instructor's Teaching Note *in one **Microsoft Word document*** plus an **Excel Workbook** with all Teaching Note exhibits as well as other relevant calculations for solving the case. At least one author must be a member of the Financial Education Association.

Submissions may be made electronically to Francisco J. López Lubián (fco.lubian@ie.edu).