

Please format source citations as footnotes (or, if there are more than 25 citations in the document, as endnotes). Please use the notes system as outlined in *The Chicago Manual of Style*, 17th edition (CMOS), when formatting citations as well as any works listed in the body of teaching notes (e.g., in the Relevant Readings section). Primary sources are preferred when available. Please use short forms for subsequent citations of sources already given in full (see CMOS 14.29–36).<sup>1</sup>

Unless referring to the work as a whole, a citation should specify page numbers. Citations of direct quotations should always specify a page number (if the source is paginated). For sources with four or more authors, list only the first author, followed by “et al.” (see first example under Cases). Access dates should be provided when no publication date is present.

In citations where the titles of non-English works have been translated into English, please ensure the original language of the work is indicated in square brackets following the translated title (see CMOS 14.99, fifth example). In these instances, the title is capitalized headline-style. Google Translate can be helpful for refining translated titles, if needed. Here is an example of employing this approach:

- “Top 100 Global Auto Parts Suppliers in 2023” [in Chinese], Baijiahao, July 2, 2023, <https://baijiahao.baidu.com/s?id=1770265231239154787>.

## Books

- Horst Rechelbacher, *Minding Your Business: Profits That Restore the Planet* (San Rafael: Earth Aware Editions, 2008), 119.
- Jim Collins and Jerry I. Porras, *Built to Last: Successful Habits of Visionary Companies*, 3rd ed. (New York: HarperBusiness, 2002), 5–7.

## Shortened Notes

- Rechelbacher, *Minding Your Business*, 122.
- Collins and Porras, *Built to Last*, 10.

## Cases

Please note that for cases and articles published or distributed by Ivey Publishing, the product coordinator will add a product note following the citation, as in the examples below.

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<sup>1</sup> For a quick citation guide that provides further examples of commonly cited sources, see “Notes and Bibliography: Sample Citations,” *The Chicago Manual of Style Online*, accessed October 12, 2023, [https://www.chicagomanualofstyle.org/tools\\_citationguide/citation-guide-1.html](https://www.chicagomanualofstyle.org/tools_citationguide/citation-guide-1.html).

- Wajahat Azmi et al., *Herbo Drugs & Pharmaceuticals: Cost of Capital and Capital Budgeting* (London, ON: Ivey Publishing, 2023), 3. Available from Ivey Publishing, product no. W34060.
- Ayelet Israeli and Anne V. Wilson, *Crocs: Using Community-Centric Marketing to Make Ugly Iconic* (Boston, MA: Harvard Business School Publishing, 2023). Available from Ivey Publishing, product no. 524006.

### Shortened Notes

- Azmi et al., *Herbo Drugs & Pharmaceuticals*, 2.
- Israeli and Wilson, *Crocs*, 2.

### **Chapter in a Book**

Provide the chapter title and number. If no chapter number is available, the chapter's inclusive page numbers should be given, as in the second example. If a chapter is being cited in a note (as opposed to being referred to as a whole in the Relevant Readings section of a teaching note), the page or pages cited should be listed, as in the third example.

- Michiel R. Leenders, Louise A. Mauffette-Leenders, and James A. Erskine, "Origin, Lead, Initial Contact," chap. 3 in *Writing Cases*, 4th ed. (London, ON: Richard Ivey School of Business, University of Western Ontario, 2001).
- Henry David Thoreau, "Walking," in *The Making of the American Essay*, ed. John D'Agata (Minneapolis: Graywolf Press, 2016), 167–195.
- Karen Virag, ed., "Punctuation," in *Editing Canadian English*, 3rd. ed. (Toronto: Editors' Association of Canada, 2015), 129.
- Imogen Hart, "The Designs of William Morris," in *Cambridge Companion to the Pre-Raphaelites*, ed. Elizabeth Prettejohn (Cambridge, UK: Cambridge University Press, 2012), 211–222.

### Shortened Notes

- Leenders, Mauffette-Leenders, and Erskine, "Origin, Lead, Initial Contact," 33.
- Thoreau, "Walking," 182.
- Virag, "Punctuation," 130.
- Hart, "The Designs of William Morris," 213.

### **Corporate Documents**

Published reports, corporate documents, and other free-standing publications (e.g., PDFs) that indicate an author as well as the place of publication (city), the publisher, and the date (year) of publication can be treated as books (see first example below). If you lack data for some of the usual elements, such as place of publication and publisher, provide a simplified citation (see second example below).

- Padma M. Sarangapan et al., *No Teacher, No Class: State of the Education Report for India, 2021* (New Delhi: UNESCO New Delhi, 2021), 47, <https://unesdoc.unesco.org/ark:/48223/pf0000379115>.

- Mountain Equipment Company, *2022 Sustainability Progress Report*, 38, accessed October 12, 2023, [https://prismic-io.s3.amazonaws.com/mecheadless/2e0abcc4-150e-4291-a6c5-4fd87ea5a9ad\\_2022+MEC+Sustainability+Progress+Report+-+English.pdf](https://prismic-io.s3.amazonaws.com/mecheadless/2e0abcc4-150e-4291-a6c5-4fd87ea5a9ad_2022+MEC+Sustainability+Progress+Report+-+English.pdf).

### Shortened Notes

- Sarangapan et al., *No Teacher, No Class*, 52.
- Mountain Equipment Company, *2022 Sustainability Progress Report*, 38.

### **Databases**

For information obtained from platforms and databases, please provide as much of the following information as possible: the author's or the company's name, a title or a description of the content, the name of the database, and an access date. Include a URL only if the database provides a recommended stable or persistent form. For a source consulted via a library or other commercial database available only through a subscription or library account, it may be best to name the database in lieu of a URL. A URL that leads to information about the source, if not full access to it, is safe to use. Free-standing reports obtained through databases can be cited as corporate documents (see second example below).

- Apple Inc., "Stock Prices of Shares for Apple Inc.," Bloomberg LP, accessed January 21, 2023.
- IBISWorld, *Candy Production in the US*, 6, September 2023, <https://my.ibisworld.com/ca/en/industry/72221bca/at-a-glance>.

### Shortened Notes

- Apple Inc., "Stock Prices of Shares for Apple Inc."
- IBISWorld, *Candy Production*, 12.

### **Interviews and Internal Company Documents**

If a member of the subject organization of a field case is directly quoted, that quotation does not need to be cited in a footnote.

Any internal company documents provided by the subject organization of a field case can be cited in an exhibit source line as follows and do not require any additional information:

Source: Company documents.

### **Journal Articles**

- John H. Dunning, "Towards an Eclectic Theory of International Production: Some Empirical Tests," *Journal of International Business Studies* 11, no. 1 (Spring–Summer 1980): 9–31, <https://www.jstor.org/stable/154142>.
- Boyan Jovanovic and Peter L. Rousseau, "Specific Capital and Technological Variety," *Journal of Human Capital* 2, no. 2 (Summer 2008): 135, <https://doi.org/10.1086/590066>.

### Shortened Notes

- Dunning, “Towards an Eclectic Theory,” 12.
- Jovanovic and Rousseau, “Specific Capital,” 132.

### **Magazine Articles**

- Michael E. Porter, “The Five Competitive Forces That Shape Strategy,” *Harvard Business Review*, January 2008, 1–18. Available from Ivey Publishing, product no. R0801E.
- Susan Adams, “How the SAT Failed America,” *Forbes*, November 30, 2020, <https://www.forbes.com/sites/susanadams/2020/09/30/the-forbes-investigation-how-the-sat-failed-america/>.

### Shortened Notes

- Porter, “The Five Competitive Forces,” 8.
- Adams, “How the SAT Failed America.”

### **Newspaper Articles**

- Richard Dal Monte, “Green Scene: Vancouver’s Best Vegan and Vegetarian Restaurants,” *Financial Times*, October 10, 2023, <https://www.ft.com/content/d7a8160b-d84b-4830-b3cd-029a95179bbb>.
- Holly Hogan, “The Secret Life of Plastic,” *Walrus*, October 3, 2023, <https://thewalrus.ca/the-secret-life-of-plastic/>.

### Shortened Notes

- Dal Monte, “Green Scene.”
- Hogan, “The Secret Life of Plastic.”

### **Podcasts**

- Matt Quin, “Eli Lilly in India: Rethinking the Joint Venture Strategy,” December 3, 2020, in *Ivey Decision Point*, produced by Ivey Publishing, podcast, MP3 audio, 28:46, <https://www.ivey.uwo.ca/publishing/podcast/2020/12/eli-lilly-in-india-rethinking-the-joint-venture-strategy/>.
- Simon Nantais and Russell Field, “A Night at the Gardens: Class, Gender, and Respectability in 1930s Toronto,” October 12, 2023, in *Witness to Today*, produced by the Champlain Society, podcast, MP3 audio, 37:14, <http://www.npr.org/podcasts/510303/how-to-do-everything>.

### Shortened Notes

- Quin, “Eli Lilly in India.”
- Nantais and Field, “A Night at the Gardens.”

## Social Media

When citing a social media post, quote as much as the first 160 characters, including spaces, capitalized as in the original (see *CMOS* 14.209).

- Pete Souza (@petesouza), “President Obama bids farewell to President Xi of China at the conclusion of the Nuclear Security Summit,” Instagram photo, April 1, 2016, <https://www.instagram.com/p/BDrmfXTtNCt/>.
- Conan O’Brien (@ConanOBrien), “In honor of Earth Day, I’m recycling my tweets,” Twitter, April 22, 2015, 11:10 a.m., <https://twitter.com/ConanOBrien/status/590940792967016448>.

### Shortened Notes

- Souza, “President Obama.”
- O’Brien, “In honor of Earth Day.”

## Web Pages and Websites

- “Facebook Ad Revenue (2017–2026),” Oberlo, accessed December 26, 2022, <https://www.oberlo.com/statistics/facebook-ad-revenue>.
- Teachmint (website), accessed October 12, 2023, <https://www.teachmint.com/>.
- “Writing Case Studies,” Ivey Publishing, accessed October 12, 2023, <https://www.iveypublishing.ca/s/writing-case-studies>.

### Shortened Notes

- “Facebook Ad Revenue (2017–2026).”
- Teachmint.
- “Writing Case Studies.”

## Videos

- Teachmint, “Teachmint Presents Changemakers | Decoding the Power of School Digitization with Kiran Prasad | Ep1,” July 29, 2022, YouTube video, 3:04, <https://www.youtube.com/watch?v=6hC02lR3Re0>.
- Ivey Publishing, “The Ivey Difference | Ivey Publishing,” December 7, 2021, YouTube video, 0:55, <https://www.youtube.com/watch?v=boJ68RC4Tlo>.
- Julian Treasure, “How to Speak So That People Want to Listen,” June 2013, TED video, 9:45, [https://www.ted.com/talks/julian\\_treasure\\_how\\_to\\_speak\\_so\\_that\\_people\\_want\\_to\\_listen](https://www.ted.com/talks/julian_treasure_how_to_speak_so_that_people_want_to_listen).

### Shortened Notes

- Teachmint, “Teachmint Presents Changemakers.”
- Ivey Publishing, “The Ivey Difference.”
- Treasure, “How to Speak.”