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Society for Case Research

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SCR President's Note

It has been my great pleasure to serve as President of the Society for Case Research for 2016-17.

I would like to start by thanking special SCR members whose contributions to this organization are significant. These people dedicated their time, energy and resources to make our organization one of the best case writing associations in the world.

A sincere thank you to Kay Hodge for her work on the successful 38th Annual Society for Case ResearchSummer Case Workshop that was held in Kearney, NE July 14th to 16th.

Neil Tocher, who has served as the VP Program chair for the MBAA/SCR conference in Chicago in 2014-15 and again this year 2016-17 deserves a big thank you.

Karen Foust, who is always behind the scenes keeping our organization financially sound, is to be commended, as well as Joanne Tokle, our Executive Director. Both of them keep SCR running smoothly.

Our editors and co-editors for the journals should be recognized as well: Kay Hodge, Leigh Cellucci, Cara Peters, Tim Redmer, Elizabeth Jones, Tim Brotherton, and a new Business Case Journal editor in 2017, George Whaley.

I also wish to thank Michael Stellern for organizing the Summer Conference and Workshop in Kansas City, MO. Please see the full details on page 6.

I ask you—members of SCR-- to consider volunteering to serve on a committee or on the Board of Directors. We need your insight to continue our great work.

Finally, I thank the Board of Directors for their efforts this year. We voted and approved a partnership with the Global Jesuit Case Series beginning with our summer conference in Kansas City, MO in July.

It has been an honor to serve.

Best and thanks,

Craig Davis
President 2016-2017

The Society for Case Research: Purpose and Objectives and Membership

The Society for Case research is a nonprofit organization whose primary purpose is the development of individual efforts in the field of case research, case writing and case teaching.

The major objectives are:

1. To promote the association of case writers and those using cases in their teaching or research.

2. To provide programs for the exchange of ideas and the improvement of case research, writing and teaching.

3. To assist in the publication of written cases and the results of other scholarly work related to case writing and teaching.

4. To provide recognition for excellence in case research, writing and teaching.

For membership information, see the SCR website at www.SFCR.org or contact:

Karen Foust
SCR Treasurer
504-865-5548
kmfoust@bellsouth.net

Welcome from 2017 Program Chair

Greetings and welcome to the 2017 Annual Meeting of the Society for Case Research (SCR).

The next few days in Chicago promises to be an exciting and educational time for members of SCR. During this time, we will have the opportunity to interact and share ideas with peers from all over the world, continuing the tradition of excellence for our case writing society.

The members of the Society for Case research are talented and committed to improving the quality of education for undergraduates and graduate students. This is evident with submissions that were made this year. These include Cases, critical incidents, embryo cases, and panel discussions. I invite you to step outside of your comfort zone and attend the session that is outside of your discipline.

I would like to thank the board and membership for this opportunity to serve as program chair for this year's conference. I would also like to thank the many members of the society who stepped up to serve as chairs, scribes, and discussants for the various sessions.

Finally, I would like to thank everyone who submitted items for this year's meeting and who work so hard to provide valuable materials for classroom use. I hope that the meeting exceeds your expectations and you have a great time while you're in Chicago.

Sincerely,

Neil Tocher
SCR President elect and program chair 2017 Program
Idaho State University

The Society for Case Research Summer Workshop
Call for Papers, Summer 2017
Rockhurst University
Thursday, July 20, 2017 - Saturday, July 22, 2017

The Society for Case Research (SCR) facilitates the exchange of ideas leading to the improvement of case research, writing, and teaching; assists in the publication of written cases or case research and other scholarly work; and provides recognition for excellence in case research, writing, and teaching.

We are excited to announce that this summer, SCR will host a joint workshop with the Global Jesuit Case Series (GJCS) and will include faculty from Jesuit colleges and universities around the world. An outcome of this collaboration will be a special edition of *the Journal of Case Studies*, published in 2018 which emphasizes Jesuit values. These values include making explicit the link between principled decision making and discipline specific issues faced by the industry. Cases submitted will embody the values of social justice, human dignity, moral leadership, ethics, corporate social responsibility, and sustainability. This holistic approach to the case study method contributes to the formation of reflective, value-centered leaders whose actions are driven by a concern for their organization, society, and the world.

Of course, there will be the continued publication of the journals for the Society for Case Research and the collaboration with the GJCS will result in additional publishing avenues offered to conference attendees including:

- Business Case Journal
- Journal of Case Studies
- Special Edition Journal of Case Studies/ Global Jesuit Case Series
- Global Jesuit Case Series
- Journal of Critical Incidents

The workshop begins at 8 a.m. on Thursday, July 20 with a Case Writer's Boot

Camp. The charge of the Boot Camp will only be an additional $50. During this boot camp, those who are new to case writing will learn about writing good cases and what can be done to make your ideas a reality. It is an excellent opportunity for anyone wishing to develop their case writing skills. For those members who are not attending the Boot Camp," the workshop begins with registration from 3:00 – 5:00 at Conway Hall and dinner and social hour at 5:30. Additional details will be furnished at a later time.

Important dates:

Case submission deadline	June 2, 2017
Acceptance/Rejection notification	June 9, 2017
Early registration deadline	June 16, 2017
Final registration deadline	July 7, 2017

Send your submissions to: Michael.stellern@rockhurst.edu

Please send all your submissions to Michael Stellern at Rockhurst University, but check on your registration whether you want your submission to be considered for the special edition of the Jesuit Journal. The special edition journal will follow all SCR guidelines and will be a co-produced version of the Journal of Case Studies. The Journal of Case Studies and the special edition Jesuit journal will have similar acceptance rates. Additionally, the best article submitted for the Global Jesuit Journal will be printed in *the Business Case Journal*.

Past Presidents

2015 - 2016	Leigh W. Cellucci, East Carolina University
2014 – 2015	John D. Veal, Jr., Webster University
2013 - 2014	Karen Berger, Pace University
2012 – 2013	Eric Nelson, University of Central Missouri
2011 - 2012	Leslie Korb, Georgian Court University
2010 – 2011	Kay A. Hodge, University of Nebraska at Kearney
2008 – 2010	William Stratton, Idaho State University
2007 - 2008	Robyne Hart, Hanover College
2006 - 2007	Martha C. Fransson, Rensselaer Polytechnic Institute
2005 - 2006	Cheryl Noll, Eastern Illinois University
2003 – 2005	Barbara H. Nemecek, University of Wisconsin, River Falls
2002 – 2003	Robert A. Orwig, Mercer University/North Georgia College and State University
2001 – 2002	James W. Camerius, Northern Michigan University
2000 – 2001	Edwin C. Leonard, Jr. Indiana University Purdue University Fort Wayne (IPFW)
1999 – 2000	Jeryl Nelson, Wayne State College
1998 – 1999	Grant Lindstrom, University of Wyoming
1997 – 1998	Dean Dudley, Eastern Illinois University
1996 – 1997	Paula Saunders, Wright State University
1995 – 1996	Roy Cook, Fort Lewis College
1994 – 1995	Lynda Goulet, University of Northern Iowa

SCR 2016-2017 OFFICERS AND BOARD MEMBERS

Guidelines for Program Participants

Authors

The intent of the sessions is to provide guidance to authors for strengthening their critical incidents and embryo cases. The general assumption is that the authors plan to have their submission published at some point. All members of the program should work with this goal in mind.

Authors should plan a minimal presentation of their critical incident or embryo case. Basically, describe your reason for developing the idea, how it might be used, and any specific feedback you would like from the session.

Keep your presentation to a maximum of 5 minutes. (The session chair and discussants will have read your paper so there is no need to summarize it for them. You need to bring 15-20 copies of your submission for audience members who can read it while it is being discussed.)

Rooms are NOT equipped with audio visual or computer equipment.

Make certain you have a copy of the scribe notes before you leave the session.

Session Chairs

The intent of the sessions is to provide guidance to authors for strengthening their critical incidents and embryo cases. The general assumption is that the authors plan to have their submission published at some point. All members of the program should work with this goal in mind.

Chairs are responsible for conducting the sessions. Sessions need to start and end on time. All Discussants and Authors should be allotted equal time. This means each embryo case or critical incident has a total of 20-25 minutes. Try to leave a few minutes of this time for audience participation.

Chairs are expected to make constructive suggestions for improving the submission just as are the Discussants.

Save about 5 minutes at the end of each presentation to work with the Scribe, Author, and Discussants to reach agreement on what changes (1) must be made; (2) could potentially improve the submission, and (3) other changes the author(s) might want to consider.

Please collect one copy of the Scribe notes and give them to the Program Chair, Joe Thomas, at the end of your session. Make certain the author has the original.

Discussants

The intent of the sessions is to provide guidance to authors for strengthening their critical incidents and embryo cases. The general assumption is that the authors plan to have their submission published at some point. All members of the program should work with this goal in mind.

Please read the critical incident or embryo case in advance of the conference with the intent of providing the author constructive feedback to help strengthen the submission. What changes could the author make that would make the submission more "teachable?" What changes could be made that would increase its chances of being published?

It is helpful if you print a copy of each submission and make notes on the paper copy for your use during the session. These notes also serve as guidelines for the author if they chose to revise their submission. Please give these notes to the author at the end of their session. Alternatively, you can email the Author a copy with your reviewer comments.

You only have about 5 minutes to share your comments. It may be necessary to prioritize your suggestions. Focus on missing information, redundancies, and other significant changes. Spelling and grammar issues are usually best handled by noting them on the copy given the author.

Scribes

The intent of the sessions is to provide guidance to authors for strengthening their critical incidents and embryo cases. The general assumption is that the authors plan to have their submission published at some point. All members of the program should work with this goal in mind.

The scribe is to take notes reflecting the comments and suggestions made by the discussants and session chair.

There is usually about 5 minutes at the end of each presentation devoted to reviewing the scribe's notes. The scribe reviews the comments and participants (chair, discussants, and author) reach consensus on what changes (1) must be made; (2) could potentially improve the submission, and (3) other changes the author(s) might want to consider.

Notes will be taken on 2-part carbonless paper available in the session rooms. Once the notes are completed Scribes are asked to give the original copy to the author. The copy will be collected from the room at the end of the session by the session chair or program chair. Please make sure that the name of the CI/embryo case and the time of the session are indicated at the top of each page.

A couple of quick notes about the carbonless paper:

The white sheet is the top page, and the yellow sheet is the “carbon copy”

Please do not stack the sheets on each other while you are writing…your writing will actually go on the other “carbon pages.”

Roles and Responsibilities Attendees

The SCR annual meeting is an event with opportunities for scholarship and fun. Sessions throughout the day are designed to involve authors and the audience in the opportunity to enhance scholarly research. The responsibilities of each of the roles at the meeting are briefly reviewed below. Whether you are presenting or discussing you will come away from the meeting with ideas to incorporate as you write and publish cases and critical incidents.

Chair

Chairs should begin and end sessions on time. The collegial exchange of ideas means the chair should strive for inclusiveness. Discussants first provide feedback and then authors, the chair and those attending the session will participate in a discussion of the work. This is an opportunity for authors to ask questions and receive clarification about comments and suggestions. The chair should watch the schedule and provide equal time to all scheduled to present.

Discussant

Discussants should prepare written comments in advance to share with chair, attendees and presenters. The SCR tradition is to provide feedback to help authors prepare their work for publication. Discussants may find it helpful use the JCI Reviewer form as a guide. Discussants typically "mark up" copies of papers to provide authors with grammar, spelling and stylistic suggestions. The conversation at the meeting is too suggest changes, clarification, ask questions and provide a thorough review similar to what an author receives in a blind publication review. The benefit of the face-to-face communication is that ideas and the quality of work is enhanced by the collaborative review.

Scribes

The role of the scribe is to accurately reflect the comments and suggestions the author must respond to. The scribe takes notes and then will review them briefly to make sure participants' views are correctly represented. Discussants and participations usually begin with a brief review indicating whether or not the work presented seems to be a case or an incident and what steps an author might take to either expand or shorten work to meet case of CI criteria. The scribe distills the comments and develops a list which is usually categorized based on changes the author must incorporate, ones the participants don't require but think might help or enhance the work and any additional general comments.

Panelists and Authors

Provide copies of your panel, incident or embryo case to the audience. You will briefly present your work and then discussants, the chair and audience will participate in collegial feedback to help you develop your work for publication. Internet connectivity and projection equipment are not available so plan to informally share your work. Authors will receive suggestions, comments and ideas they will need to address before submitting work to The Journal of Critical Incidents for blind review. Comments are typically a consensus of participants and developed collaboratively with authors. The editors of the JCI and reviewers will receive the comments from the meetings.

Critical Incident Abstracts

Who is minding the contributions?
Responsibilities of board members and management

Ellen Lippman, University of Portland
Teri Grimmer, University of Portland

Abstract

Donald and Mildred Othmer were long time supporters of Long Island College Hospital. Their wills, written in 1988, directed that approximately 1/5 of their $730 million estate be given to the hospital; the principal was to remain restricted with only the interest available to be spent as management and the board of the hospital chose. However, by the time of the Othmers passing, the ability of the hospital to maintain that restriction was significantly in doubt. Should the board have accepted the bequest? Once accepted, what responsibility did the board have to maintain that restriction? When the auditors learned of the gift, what responsibility did they have?

Learning Outcomes:

In completing this assignment, students should be able to:

1. Assess the financial condition of a not-for-profit based upon an analysis of audited financial statements and financial ratios.
2. Evaluate the decision to accept the bequest.
3. Consider the management and board responsibility for maintaining the bequest restriction subsequent to acceptance of the gift.
4. Identify appropriate responses by the external auditors of the not-for-profit.

Application

The case is most appropriate for a management of not-for-profit organizations course, an accounting course, or a course in ethics.

Key Words:

Not-for-profit, bequest, donation

Contact

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Lamar Outdoor Advertising:
A Bright Future for Digital Billboards? A Case Study

K. Blaine Lawlor, University of West Florida

Synopsis

The billboard industry had an unfavorable reputation in some markets and faced a patchwork of restrictive regulations at the federal, state, and city level. However, digital billboards were disrupting the industry and creating new opportunities and challenges. Digital billboards were expensive to purchase and install, but provided up to 6 times the revenue of a static display. Lamar, under the guidance of Bobby Switzer, was actively trying to standardize the components in digital boards to reduce the costs. The ability to monitor and update digital billboards remotely allowed Lamar to centralize some functions of the digital rollout.

However, the company relied on a largely decentralized management style which gave the majority of the power to decide to implement digital displays to the individual branch managers. The decentralized management style meant that some markets actively embraced digital while others did not. The culture of the company was such that as long as the branch managers could justify the decision and took care of the employees and equipment, they could make decisions that they felt were best for their market.

Two managers embraced digital billboards with different results. One manager was in a highly regulated market that had banned new billboards and the other was in a market that did not enforce regulations and was flooded with digital. The highly regulated market transitioned from 27 static boards to 9 digital billboards while significantly increasing revenue. This changed the conversation of what was possible at the local level and opened the possibilities of how Lamar would plan to capitalize on the digital future.

Teaching Objectives

1. Understand the importance of strategic planning in real world scenarios.
2. Explore the impact of changes in technology on product lines and the regulatory environment.
3. Evaluate and understand the possibilities and pitfalls of implementing new technologies into mature product lines.
4. Understand the importance of company culture, boundaries, and rewards to achieve consistent success.
5. Use historical information to develop a strategy to maximize the benefit of the new technology.
6. Develop a three to five-year plan to implement the strategy.

Case Use

This case is appropriate for undergraduate and graduate level Strategic Management classes. The primary focus of the case is on strategy and implementation with the use of company culture as the main lever to achieve desired organizational behaviors.

Contact

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Laughing while black: The Wine Train Incident

Monika Hudson, University of San Francisco
Keith O. Hunter, University of San Francisco

Abstract

On August 22, 2015, 11 members of a women's reading group, Sistahs on the Reading Edge, were removed from the Napa Valley Wine Train two hours into a recreational journey through wine country. Wine Train employees claimed that the reading group were making too much noise, but members of the predominantly African-American reading group held that the group had been treated differently from other passengers due to racial bias. Complicating factors of this incident emerged from a succession of decisions, each of which brought their own consequences. Ultimately, the Wine Train settled an $11 million discrimination lawsuit out of court, and the decision to eject the ladies from the train was likely costly indeed. What key decision resulted in 11 members of the Sistahs on the Reading Edge Book Club being escorted off of the Napa Valley Wine Train at a stop in St. Helena with police officers awaiting them?

Learning Outcomes

1. Identify and analyze the implications of the general diversity issues in play within the context of this incident.
2. Formulate possible antecedents and consequences of the concerns, perceptions, and behaviors portrayed.
3. Categorize the role of communication in both the emergence and the resolution of the situation presented.
4. Critically examine the logical approaches a decision-maker might take in response to the situation and hypothesize possible outcomes resulting from the decisions made.

Application

This case is most appropriate for upper-level undergraduate or graduate students of organizational behavior or human resources, leadership, diversity and inclusion, or business communication.

Key Words

Diversity and inclusion, bias, discrimination, customer service

Contact

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Let's Play: Fair Use or Copyright Infringement?

Jessica A. Magaldi, Pace University

SYNOPSIS

The critical incident stems from a controversy between MasaeAnela, a YouTube content creator, and Nintendo, owner of *Twilight Princess*, a video game from the Legend of Zelda franchise. MasaeAnela produced and uploaded to YouTube a Let's Plays video, which consisted of play through of a game containing various dialogue and humor inserted over actual gameplay by the Let's Play'er. In the video, MasaeAnela played through a portion of the game *Twilight Princess*. In addition to being an outlet for creativity, the video earned MasaeAnela revenue through her YouTube channel, which featured this and other Let's Plays as well as other of her original content. Indeed, any of her 1,300 videos made use of Nintendo intellectual properties. After she posted her Twilight Princess Let's Play, Nintendo, a YouTube partner, flagged the video with a copyright claim.

Nintendo believed that MasaeAnela's Let's Play video was a violation of Nintendo's copyright to *Twilight Princess* because MasaeAnela had made a derivative work without obtaining Nintendo's permission. MasaeAnela believed she had a fair use right to make use of a third party's intellectual property.

Learning Outcomes

Users of the Critical Incident can expect the following learning outcomes. Students should be able to:

1. Examine the underlying principles and public policy of copyright law in the context of a real-life situation.
2. Evaluate a party's use of a creative work of another in light of the law of copyright and copyright infringement, specifically with respect to the creation of derivative works.

3. Analyze a legal defense from two perspectives to advocate for a position and to determine the strength of an opponent’s arguments.

APPLICATION

The critical incident is appropriate for classes in business law, the legal environment of business, intellectual property law and ethics. It was tested in business law courses at the undergraduate level.

KEY WORDS

law, copyright, infringement, social media, video games, derivative works

CONTACT

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Teaching leadership from both sides of the classroom door:
The case of the homeless leadership class

Abstract

The guarantee of a classroom for course instruction is an expectation of students who register for a face-to-face or an on-ground course at colleges and universities. Unfortunately, the assurance of a classroom for the first day of class is not always the case for a wide range of reasons. One possible reason for this shortcoming is leadership. The challenge of not having a classroom presented an opportunity for the students in one professor's leadership class to personally examine each element (i.e., leader, follower, situation) in the interactional framework for analyzing leadership. This case provides first-hand accounts of the leadership lessons learned by students and the professor as they traveled along the path to a classroom.

Learning Outcomes

In completing this assignment, students should be able to:

1. Distinguish between managers and leaders.
2. Examine the interactional framework of the leadership process.
3. Appraise leadership success in terms of subordinate job satisfaction.
4. Demonstrate how influence tactics can be used to exert power.
5. Examine the concept of lateral interdependence.

Application

The case is most appropriate for undergraduate or graduate courses in leadership and organizational behavior.

Keywords

leadership, job satisfaction, management, power, influence tactics, lateral interdependence

Contact

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University, 14000 Jericho Park Road, Bowie, MD 20715, Email mbumpus@bowiestate.edu.
Phone 301-860-3640.

The case of the traveling priest: Faithful father or family man?

Kathy S. Pollock, Indiana University Purdue University Fort Wayne
Janet C. Papiernik, Indiana University Purdue University Fort Wayne

ABSTRACT

This descriptive critical incident describes the events and tragic consequences of Father Rodney Rodis' extensive fraud that that extended over a 14-year period while serving as the pastor of two Roman Catholic rural parishes in central Virginia. Rodis, who suffered from chronic health issues, pleaded guilty to mail fraud and money laundering. He was ordered to pay back almost $600,000 to the Catholic Diocese of Richmond and was also sentenced to eighteen years in prison. In a for-profit company employee embezzlement typically averaged a loss of approximately $130,000 over an 18-month period (ACFE Fraud Survey, 2014). However, the authors have recognized that in a non-profit organization the trust extended to the employees puts the organization at an even greater risk allowing for higher amounts of lost dollars and a longer period of time for the fraud to be detected. Rodis' congregations were devastated. He had been a dedicated servant for 14 years. But, what was also most troubling was the disloyalty by their beloved priest. Rodis was also a husband and father, living with his wife and three daughters located a distant 50 miles from the churches to which he ministered.

LEARNING OUTCOMES

In completing this assignment, students should be able to:

1. Demonstrate his/her understanding of the fraud triangle.
2. Create a system of internal controls to prevent such frauds in the future.
3. Demonstrate his/her understanding of victims' response to fraud and how that response may influence his/her decisions in relation to the situation.

APPLICATION

This critical incident is most appropriate for courses in accounting information systems, auditing, and fraud examination.

KEY WORDS

Fraud triangle, COSO model, Kubler-Ross stages of grief, embezzlement, abuse of power

CONTACT

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Email: papiernj@ipfw.edu Phone: 260.481.6477

A One-Time Pension Opportunity

Critical Incident Summary

Jeff Brookman, Idaho State University
Ann M. Hackert, Idaho State University

Abstract
This critical incident requires an individual to make a decision about how to receive her husband's pension. Her husband is suffering from a disability which requires care and his wife, Shirley, needs to decide which option to select. A note from a firm her husband, Cliff, worked for years ago offered a one-time opportunity to receive his full retirement benefit in a single lump sum payment. The note was sent on September 12th and she had until October 31st to decide. Shirley and her husband also had the option to wait until Cliff's formal retirement age in two years to take retirement and receive the payments in the form of an annuity. Cliff and Shirley could also take the retirement immediately with a 11% reduction in the monthly annuity payment amount. To further complicate things, the payment options include a single life annuity, 50% joint and survivor annuity, 75% joint and survivor annuity, and 100% joint and survivor annuity. These payment options indicated the amount Shirley would receive in the event of Cliff's death during retirement. The question was whether to take the retirement as a lump sum, wait until retirement to receive an annuity or to take retirement early; and if they choose to receive an annuity to decide which payment option to choose.

Learning Outcomes
The learning objectives for the critical incident are:
1. Identify the inputs needed to evaluate the alternatives for pension benefit options.
2. Evaluate the alternatives for pension benefits.

Application
This incident can be used in a basic finance or personal finance class at the introductory level or in any class with a financial planning component. The CI assumes the student has basic skills in finance including an understanding of time value of money calculations and concepts. The CI extends chapter concepts from theory to practice for both a basic finance class and a personal finance class to illustrate the qualitative and quantitative issues associated with a pension decision. The typical student demographic is not currently making this decision, but the choices are part of financial planning and personal finance. This also illustrates the application of basic finance concepts to personal financial decisions.

Key Words
Finance, Personal Finance, Investing

Contact

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DEVELOPING TRUST IN THE HOUSEKEEPING STAFF

Eric Nelson, University of Central Missouri
Kendall Meyer, University of Central Missouri

ABSTRACT
Kendall Meyer was frustrated. He had recently started his internship in the housekeeping department for the Hilton St. Louis airport and was experiencing credibility and performance issues with the housekeeping staff who he was responsible for supervising. Specifically, one of the housekeepers seemed to be testing him to see if he knew how to inspect rooms. As a new hire and a manager with limited housekeeping experience, how can Kendall work toward holding his staff accountable, while being sensitive to the fact they know more than he does? What is the best approach to build trust and show competence in this situation?

LEARNING OUTCOMES
After reading and studying this critical incident, students should be able to:

1. Foster relationships to build trust.
2. Create a climate of trust.
3. Demonstrate how trust is built.
4. Make recommendations to break down silos at work.

APPLICATION
This critical incident would be useful in undergraduate hospitality, organizational behavior or leadership courses focused on accountability, creating credibility, developing trust, performance management, or lodging operations.

KEY WORDS
Hospitality, Leadership, Housekeeping

CONTACT
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It's About Growth

Dale Varble, Indiana State University
Joyce A. Young, Indiana State University

Synopsis
The Valley Lake Federal Credit Union's board of director's strategic & tactical planning session had just adjourned. Through a lengthy discussion, the nine person board had identified and examined three strategic marketing options that could continue the credit union's success path. Each option involved financial services that could grow membership in the credit union. The board was eager to see growth in members that would make both deposits and obtain loans. Such expansion was critical given the greater use of technology and regulations in the credit union sector and their associated costs. A larger membership base would allow the board to spread the costs across more individuals thus easing the burden on current members. Students are asked to decide which course of action Linda Clark, Chief Executive Officer of the credit union, should recommend at the next monthly board meeting.

Learning Objectives
On completion of the assignment students should be able to:

1. Identify and assess the factors that affect an organization's market
2. Identify and evaluate environmental factors relevant to an organization's success
3. Assess the capabilities and limitations of an organization
4. Select a strategic marketing option and justify the selection as the one most appropriate

Application
This decision-based critical incident is appropriate for use in undergraduate courses such as Principles of Marketing, Marketing Management, Consumer Behavior, and Services Marketing.

Key Words
Market planning, market factors, environment trends, competition

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WHAT'S THAT SMELL COMING FROM THE BATHROOM? MAKING SENSE OF EMPLOYEE BEHAVIOR AT A RESTAURANT

Eric Nelson, University of Central Missouri
Chad Brown, University of Central Missouri

ABSTRACT

Chad is a food and beverage intern at Stefanina's, a local Italian restaurant in rural Missouri. He experiences a test of his leadership skills less than three weeks into being promoted to a manager. He discovers an employee smoking marijuana in the bathrooms while the restaurant is open. As a new manager, Chad has not faced any similar situations, thus, he will need to rely on how he views his current workplace and his understanding of what is "right" in his approach to reacting to the situation. The discussion in this Critical Incident focuses on applying sensemaking as a social activity (Weick, 1995).

LEARNING OUTCOMES

As a result of analyzing this Critical Incident, students will:

1. Explain how *constructing identity* serves leaders to understand their roles in relation to the world around them.
2. Shape experience into meaningful patterns; apply *retrospective* (professional) experience to develop meaning.
3. Apply *socialization* skills to make a decision; be clear that where one grows up in the world, how one was taught to be in the world, where one is located now in the world, and the people with whom one is currently interacting, all affect a leader's decisions.
4. Explain how sensemaking is *ongoing*; that making sense is a perpetually emergent process of assigning meaning and awareness.
5. Recognize and build on the *extracted cues* (apprehended from sense and perception) to add to our repertoire of retrospective experience.
6. Provide *action-in-context*, or recommendations, that are based less on a matter of accuracy and completeness than plausibility and sufficiency.

APPLICATION

This critical incident would be useful in undergraduate hospitality or human resource courses focused on training, food & beverage, customer service or leadership.

KEY WORDS

Sensemaking, Leadership, Restaurant, Marijuana

CONTACT

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DELTA AIRLINES: NOT EXACTLY "FLYING HIGH"

Cheryl B. Ward, Middle Tennessee State University
Diane R. Edmondson, Middle Tennessee State University
Lucy Matthews, Middle Tennessee State University

Abstract
This critical incident describes a situation in which Sarah, a frustrated Delta customer, spent over 16 hours stranded in the airport due to flight cancellations because of a Delta technology failure. During this time, Sarah and thousands of others took to social media to express their feelings toward Delta and Delta's limited service recovery efforts.

Learning Outcomes

Students should be able to:

1. Evaluate service quality using the five dimensions of service quality including reliability, assurance, tangibles, empathy, and responsiveness.
2. Analyze Delta's crisis management approach.
3. Examine the role of social media in a crisis.

Application

Marketing, services marketing, social media marketing, and marketing management

Key Words
Crisis management, service quality, service recover, social media marketing, and marketing

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Trolling Twitter

Jessica A. Magaldi, Pace University

SYNOPSIS

The critical incident stems from a months-long exchange of comments over Twitter that escalated over time and finally resulted in the actor James Woods suing a pseudonymous Twitter user for defamation. Woods, who tweets as @RealJamesWoods, is a conservative-leaning political commentator and frequent critic of President Obama. Abe List, who tweets as @abelisted, is a left-leaning political commentator and frequent critic of conservative critics. On July 15, 2016, Woods tweeted "USATODAY app features Bruce Jenner's latest dress selection, but makes zero mention of Planned Parenthood baby parts market." By way of response, Abe List tweeted, "cocaine addict James Woods still sniffing and spouting." Abe List's response made use of the popular internet meme of inquiring whether someone with a perceived outrageous comment – or, at least, a comment offering a different opinion – was high or smoking something. The choice of the two words "cocaine user," which refer to a verifiably untrue statement of fact, was the difference between the clumsy execution of a popular meme and a potentially actionable defamation claim.

LEARNING OUTCOMES

Users of the Critical Incident can expect the following learning outcomes. Students should be able to:

1. Interpret the facts of a case presented to apply the law to determine the likelihood of a successful claim, in this case with respect to defamation.
2. Assess what legal defenses are available when a party is accused of defamation, including defenses that relate to First Amendment protections.
3. Assess what affirmative arguments are available when a party is sued for speech-related behavior.
4. Analyze a legal issue from the perspective of the party's opponent to advocate for a position and to determine the strength of an opponent's arguments.

APPLICATION

The critical incident is appropriate for classes in business law, the legal environment of business, intellectual property law and ethics. It was tested in business law courses at the undergraduate level.

KEY WORDS

defamation, First Amendment, internet law, speech

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BYD OF CHINA REVISITED

Charles A. Rarick, Purdue University Northwest
Arifin Angriawan, Purdue University Northwest
Kasia Firlej, Purdue University Northwest

Abstract
This case is a follow up to a previous case on the Chinese company BYD, which had the ambitions in 2008 to become the world's largest car company. With the support of an American investor Warren Buffett, the company which had only been in existence for a few years, mostly making batteries, caught the attention of not only Mr. Buffett, but also of many in the auto industry. This case examines the progress made by the Company since 2008, mostly in product innovation in the area of electric vehicle manufacturing, and explores its current strategic position. The primary subject matter of this case concerns the move towards utilizing electricity to power automobiles and the potential of a Chinese company to become the world's largest automaker, as well as the importance of China in global automobile manufacturing. Secondary issues examined include issues of industrial policy and the environment

Learning Outcomes

1. Do you think electric cars will dominate the global automobile market? What are the driving forces which either propel or hamper such a shift? Should American public policy be employed to encourage development of the industry?
2. What are the strengths, weaknesses, opportunities, and threats now facing BYD?
3. Evaluate the diversification of BYD. Does it make strategic sense to operate in the mobile phone, solar energy, and gasoline and electric vehicle industries?
4. What strategic advice would you give BYD?

Application
The case has a difficulty level appropriate for junior level students. The case is designed to be taught in one class hour and is expected to require two hours of preparation by students.

Key Words
BYD, China, electric vehicles (EVS), global automobile manufacturing, product innovation

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Illegal Procedure?
Blackman High School Football Boosters Walk Fine Line to Support Team

Donald P. Roy, Middle Tennessee State University
Diane R. Edmondson, Middle Tennessee State University
Cheryl B. Ward, Middle Tennessee State University

Abstract
This critical incident describes a situation in which Dr. Justus, in her first year as principal at Blackman High School (BHS), becomes concerned about monies disbursed by the BHS Football Booster Club. She is especially concerned about reimbursements made to the head football coach, who has a strong, winning record spanning his six years with the program. When she meets with the coach to discuss her concerns, he resigns his position. She requests more information and an investigation by the State of Tennessee Treasury Department ensues.

Learning Outcomes
Students should be able to:

1. Evaluate the actions taken by Dr. Justus and the head football coach regarding the BHS Football Program.

2. Analyze the potential impact of the State of Tennessee Treasury Department's investigation on the BHS Football Booster Club. Describe how the impact may carry over to other 501(c)3 clubs and organizations.

Application
Marketing, Ethics, Non-Profit, Sports Marketing, Social Responsibility

Key Words
Marketing, Ethics, Non-Profit, Social Responsibility, Sports Marketing

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I Think You Need Another Account

Steven M. Cox, Queens University of Charlotte
Bradley W. Brooks, Queens University of Charlotte
Dawn E. Chandler, Queens University of Charlotte

SYNOPSIS

In September 2016, Wells Fargo Bank was accused of opening fraudulent accounts for customers that they had not requested – often resulting in additional fees for those customers. The company's incentive structure for opening accounts illustrated the extent to which salespeople and their managers were incentivized. More broadly, individual employee and organizational factors interacted to influence susceptibility by some to unethical actions. As an organization, Wells Fargo now faced a critical decision in how to address these findings.

LEARNING OUTCOMES

The learning outcomes of this critical incident are as follows:

1. The student will be able to describe situational and individual that impact ethical behavior using an Interactional Model of Ethical Decision Making.

2. The student will be able to identify and to evaluate risks to brand equity to a large banking institution after fraudulent activities have been disclosed regarding its customer accounts using Keller's Brand Equity Model.

3. The student will be able to evaluate decision alternatives using Nash's Twelve Questions for Examining the Ethics of a Business Decision.

4. The student will be able to recommend courses of action for a large organization that relies on customer trust after that trust has been breached.

APPLICATION

This decision critical incident is suitable for an undergraduate course in Principles of Management, Human Resources, Principles of Marketing, Marketing Ethics, and Marketing Management. The incident offers an application of Keller's Brand Equity Model and Nash's 12 Questions within business ethics, and of Trevino's Interactional Model of Ethical Decision Making.

KEY WORDS

Human Resources, Management, Incentives, Marketing, Branding

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South Shore Clean Cities – Increasing Environmental Benefits through Reduction

Joseph Trendowski, Valparaiso University

Stephanie Trendowski, Valparaiso University

Abstract

For nearly twenty years, Carl and Lorrie Lisek have been making the Lake Michigan Region a greener place. The founders of South Shore Clean Cities were recently inducted into the US Department of Energy Clean Cities Hall of Fame. As entrepreneurs, they consciously work toward their mission of leaving the world a better place for their children. They collaborate with a variety of programs and institutions to "revitalize Northern Indiana by promoting the use of clean fuels and clean vehicle technologies". They strongly believe in improving air quality, developing economic opportunities and reducing the use of imported oil. As their success continues, South Shore Clean Cities has an opportunity to further its impact on the region and the globe.

Learning Objectives

The objectives of the South Shore Clean Cities case are:

1. Students will determine the effectiveness of the programs that SSCC has implemented.
2. Students will evaluate the effectiveness of environmental programs in their home area.
3. Students will discuss future opportunities where SSCC can make a difference.

Application

The South Shore Clean Cities Case is appropriate for undergraduate business students. Courses in management, organizational behavior, and ethics would be logical classes to maximize the value of the case.

Key Words

Sustainability, Green Fleet, Idle Reduction, Clean Cities

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Racism in China for All the World to See: A Video Ad Receives Global Media Attention

Abstract

An ad for Qiaobi laundry detergent that aired in China in the first few months of 2016 sparked outrage by global media and citizens all over the globe in France, Britain, Australia, New Zealand and the United States. The ad featured a young black man flirting with a light-skinned Asian young woman. He tried to kiss her, but instead she popped a laundry detergent pod in his mouth and pushed him into the washer. He emerged a pale skinned Asian man.

Learning Outcomes

LO 1: to examine a situation in which another culture other than their own may hold highly different values and attitudes than their own.

LO2: to identify the issues associated with one country's citizens judging another's country via the media.

LO3: to analyze the conditions under which this issue and others like it would affect change in a country's efforts toward globalization.

LO4: to develop the steps that should be taken to move a brand from local to glocal when given a situation.

Application

The case is most applicable to a course in International Marketing or a marketing or management class with an international marketing or management module.

Key Words

International marketing, international management, global marketing, racism

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HOW TO MANAGE A ROBIN HOOD IN THE CAFETERIA
Critical Incident Summary

Tyler Burch, Idaho State University
McKenzie Thomas, Idaho State University

Abstract
This critical incident describes the decision process Deborah, the cafeteria supervisor at Irving Middle School in the Pocatello/Chubbuck School District, goes through after becoming aware that one of her workers has been wantonly violating the school district's policy regarding food distribution. The decision point of the incident occurs when Dalene, a cafeteria worker, is caught providing an unauthorized free lunch to a student after the student claimed she did not have enough money to pay for it. Deborah had already warned Dalene about giving away food previously after becoming aware of an earlier occurrence. Deborah is now in the position of upholding the district's food distribution policy and disciplining an employee who has demonstrated a willingness to violate it. What action should Deborah, Dalene's supervisor, take?

Learning Objectives
The objectives of this critical incident are:

1. The students will identify and demonstrate the principles of supportive communication that Deborah could use when confronting Dalene.
2. The students will analyze various methods of conflict resolution and recommend an appropriate conflict resolution strategy based on the situational factors of the case.
3. The students will consider the role of enacted and espoused values as they apply to the school district and its policies.
4. The students will identify Kohlberg's stages of moral development and apply it the Dalene's decision to give away the free lunch.
5. The students will identify and consider human resource policy as it pertains to the potential dismissal of Dalene.

Application
This case is most appropriate for undergraduate courses in human resources, organizational behavior, leadership development, ethics, and communications. The case could be used as the basis for a role play, where appropriate communication techniques are first identified and then practiced through role play. An epilogue provided in the teaching note discusses what ultimately happened to Dalene.

Key Words
Communication, Conflict Resolution, Espoused and Enacted Values, Kohlberg's Stages of Moral Development, Termination

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Purple Collar Tees

James Litton, Abilene Christian University

Abstract
Doug is a student running an apparel company that was part of a student-run business program at his university. The majority of the company's revenues come from t-shirt sales to student groups but Doug's team had been trying throughout the year to grow sales to off-campus customers. Unfortunately, as the program's CFO delivered numbers in early spring, the profit margins for sales to student groups and campus departments were lower than the previous year and the off-campus sales were well below target. The program's supervisor asked Doug to analyze the company's sales model to determine if any changes needed to be made. Doug had begun to pull together the relevant information but still needed to develop and evaluate his team's existing sales efforts before his meeting with his supervisor.

Learning Outcomes
The objectives of this critical incident are as follows:

1. Develop a sales model / sales funnel
2. Calculate the customer acquisition cost
3. Evaluate the effectiveness of the different steps in the sales model / sales funnel

Application
This critical incident can be used for courses in entrepreneurship, marketing, and general business at the undergraduate level.

Key Words
Entrepreneurship, sales, customer acquisition cost, student-run business

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NORILSK NICKEL: CORPORATE WAR IN A LEADING RUSSIAN COMPANY

Alla Dementieva, Olga Kandinskaia, Olga Khotyasheva

Abstract

This case study is a story of a 5-year-long dramatic corporate conflict at the Russian company Norilsk Nickel, one of the world's leading producers of precious metals. The situation in the company was a conflict between the majority shareholders for the control over the business and selection of the efficient strategy of the company. In any company, there are conflicts of interest and different opinions on the business strategy. However, a well-established system of corporate governance allows to minimize those conflicts and enables most disagreements to be solved in a civilized way. The case provides an opportunity to examine the specifics of corporate conflicts in Russia and improves decision-making skills with a view to increase business efficiency.

Learning Outcomes

In completing this case, students should be able to:

1. Define the significance of corporate governance mechanisms, recall a knowledge and demonstrate a comprehension of specific corporate governance and management facts that could be taken into consideration in this situation
2. Apply the knowledge of the corporate governance methods in defending business from corporate raiding
3. Introduce the framework for corporate governance analysis and complete an analysis of different options in solving the corporate conflict, discuss the reasons and consequences of corporate conflicts for the business
4. Identify parties involved in the corporate governance process and corporate environment, and synthesize the information to discuss business ethics behavior for the situation
5. Justify the importance of Corporate Governance as a field of management research and critique the specific features of the Russian corporate sector and the corporate governance system, as well as the main differences from developed countries

Application

The Norilsk Nickel case can be used in such courses as Business Ethics or Corporate Governance at the undergraduate or graduate level that covers the topic of alternative choice or strategic decision making. There are a sufficient number of extenuating circumstances to make for a good discussion of strategic and tactical factors in this type of a corporate governance decision analysis.

Key Words

corporate governance, business ethics, corporate dispute, conflict of interests, emerging markets, Russian corporate sector

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THE ELEPHANT IN THE ROOM: WHAT TO DO ABOUT WILLIAMS

Critical Incident Summary

Susan M. Jensen, University of Nebraska Kearney
Larry Carstenson, University of Nebraska Kearney
Srivatsa Seshadri, University of Nebraska Kearney

Abstract
This critical incident draft represents a real situation in which Mike Riley, head coach of the University of Nebraska at Lincoln Cornhuskers football team, faces a dilemma. His popular and successful assistant coach, Keith Williams, was arrested for driving while intoxicated, following a minor traffic accident two weeks prior to the start of the 2016 football season. Before joining the Nebraska team in 2015, Williams was convicted of driving while intoxicated in 2004 and 2009. Coach Riley must decide what action to take following Williams' arrest.

Learning Objectives
The learning objectives of this critical incident are:
1) students will analyze the various stakeholder groups impacted by this situation and resulting decisions.
2) students will understand how decision-making of leaders can be influenced from personal values and leadership style as well as from legal and moral perspectives.
3) students will evaluate the communication strategies used in responding to a crisis and the impact those strategies can have on the brand image of the organization.

Application
This critical incident is appropriate for use in both introductory and advanced courses in crisis communications, strategy, leadership, sports management, business ethics, and brand management. Student discussion can encourage critical thinking about stakeholder analysis, communications during a crisis, how crisis management is impacted by the leadership style, values and ethical perspective of the leader, and how crisis management impacts the organization's brand image.

Key Words
Crisis Management, Stakeholder Analysis, Leadership, Brand Image, Ethics

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FAILURE DOES NOT DEFINE ME

Cameron Piercy, University of Central Missouri
Matthew VanSchenkhof, University of Central Missouri
Keyonna Gladney, University of Central Missouri

ABSTRACT

Key components of self-efficacy in a hospitality context are utilized to understand how self-efficacy increases a student's ability to navigate complex work environments. This critical incident provides an assessment of self-efficacy and prompts readers to consider how they would handle situations in which they might experience reduced efficacy. Students are asked to address four key areas of self-efficacy: past experience, mastery modeling, social processes, and psychological awareness. Students will better associate their own efficacy behaviors based on how they apply the current situation. Additionally, through analysis, students will be able to associate methods of increasing their own efficacy in workplace situations.

LEARNING OUTCOMES

The learning outcomes of this critical incident are for students to be able to:

1. Recognize and illustrate examples of self-efficacy.
2. Assess methods for increasing self-efficacy in others.
3. Propose methods to handle situations that undermine one's ability and self-efficacy.

APPLICATION

This critical incident would be useful in undergraduate hospitality or human resource courses focused on training, food & beverage, customer service or organizational behavior courses discussing manager or employee efficacy.

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Laiki Bank Capital Securities: Investor's Risks and Returns on the (Not so) Perpetual Fixed Income Instruments

Olga Kandinskaia, Cyprus International Institute of Management (CIIM)

Abstract

On May 26, 2012, a family couple from Cyprus, Andreas and Elena Ioannou, had to make a decision regarding some of their investments. In 2009-2010, they invested €127,000 in the capital securities of Laiki, the second largest bank in Cyprus. They were tempted by the 7 percent annual return paid quarterly and perpetually since the capital securities had no maturity date. On May 22, the couple was shocked to receive a tender offer from Laiki Bank for the voluntary exchange of their capital securities into either Bank's shares or a new type of capital securities. Laiki Bank was in serious financial trouble and needed to raise new capital urgently. Should the couple accept the tender offer? If yes, should they choose shares or the new type of capital securities? What should be next: keep the securities or sell them immediately? What would be the best strategy to recover their investment?

Learning Outcomes

In completing this case, the students should be able to:

1. Demonstrate knowledge and comprehension of certain types of financial instruments available to individual investors

2. Outline alternative courses of action for the main characters of the case

3. Calculate the losses/returns for the different scenarios, compare the results and identify the break-even point

4. Evaluate the situation, recommend a possible course of action to the main characters, and formulate the lessons learned from this case

Application

This decision case can be used at the undergraduate, graduate or executive level in finance-related courses such as Personal Finance, Investments or Corporate Finance as an example of perpetual fixed income instruments and an illustration to the consequences of the recent European banking crisis. The case will also fit well with a Financial Modeling course, which teaches students who already have the background in finance the use of Excel for financial calculations.

Key Words

Personal Finance, Investments, European Banking Crisis, Financial Modeling with Excel

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How Much Debt?

Asbjorn Osland, San José State University

ABSTRACT

Sarah's parents had no money to give her at the moment. She knew she could return home if she needed to go to local community college but she would prefer living on the University of California campus for the full four years in Santa Barbara. She was worried about student debt and how she could minimize it.

LEARNING OBJECTIVES

In completing this assignment, students should be able to:

1. Analyze what was reasonable for them in terms of educational debt (LO 1)
2. Evaluate part-time work and its opportunity cost (LO 2)
3. Learn to converse with parents about mutual expectations and responsibilities (LO 3)
4. Evaluate one's ability to sacrifice through frugal living (LO 4)
5. Assess romantic relationships holistically, including the economic dimension (LO 5)

APPLICATION

The critical incident is most appropriate for courses in career planning and personal finance at the undergraduate level.

It's a decision oriented critical incident in that there are a series of questions listed to consider.

KEY WORDS

Student debt, millennials staying at home

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Super Bowl Tickets for Five, Please…or Else

Joyce A. Young, Indiana State University
Paul W. Clark, Coastal Carolina University

Synopsis
This critical incident describes an ethical dilemma faced by an executive of a major soft drink producer. The executive had received word that a prospective new customer, Scott Wise, owner of a chain of eight Scotty's Brewhouse restaurants in the Indianapolis metro area, had requested five Super Bowl tickets to seal the deal in terms of his willingness to switch from serving Coke products to Pepsi products exclusively. Pepsi MAX was the official soft drink of the National Football League and in just a few short weeks, Indianapolis would serve as the host city for the Super Bowl. In the months running up to the Super Bowl, Pepsi marketing representatives had been working overtime to grow its share of fountain business in central Indiana. Students are asked to decide what course of action Amy Wirtanen, senior marketing director of Pepsi Beverage Corporation, should take in response to the incident.

Learning Outcomes
In completing this assignment, students should be able to:

1. Analyze the situation in order to identify aspects of an ethical dilemma.
2. Demonstrate an understanding of bribery and the ramifications for the involved parties.
3. Explain the concept of exclusive dealing and its legal implications.
4. Discuss the impact of the request on Pepsi and other stakeholders in the marketing channel.

Application
This decision-based critical incident is appropriate for use in undergraduate courses such as Principles of Marketing, Retailing, Marketing Channels, Marketing Strategy, Business Ethics, Business Law, and Introduction to Business.

Key Words
Marketing channels, bribery, exclusive dealing, purchasing, business ethics

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Hidden costs in city planning: Street renaming in Providence, Rhode Island

Nikolaus T. Butz, University of Wisconsin – Stevens Point
Patrick L. Schultz, University of North Dakota
Marissa M. Warzynski, University of Wisconsin – Stevens Point

Abstract
Of the 1,980 streets in Providence, RI roughly 75 have names that are either similar in sound or duplicated. This is spells disaster for Providence's emergency response services as well as its in-home nurses, taxi cabs, and tow trucks. Providence is the combination of several small colonial towns that grew together over time. Each town had its own set of street names, which were not reconciled upon merging into present-day Providence. After years of confusion, Providence has enacted a plan to identify and rename similar sounding streets. Businesses and residents of the effected streets, however, will face extra costs and challenges if they are forced to adopt a new address. As such, Providence's city planners are left with a difficult choice when deciding which of two similar sounding streets is to be renamed. How can decision makers ethically choose who gets to keep their original address and who must change?

Learning Outcomes
In completing this assignment, students should be able to:

1. Identify decision making criteria for a predefined problem-solving situation
2. Evaluate the relative importance of decision making criteria in a predefined problemsolving situation
3. Design a quantitative decision support system

Application
This critical incident is most appropriate for courses in managerial decision making, public administration, systems thinking, ethics, or social responsibility.

Key Words
decision making, city planning, systems thinking, ethics, social responsibility

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Pokémon Go: Move About and Meet People!

Asbjorn Osland, San José State University
Nanette Clinch, San José State University

ABSTRACT
Pokémon Go's website showed young people walking, running and cycling from place to place while playing the game. Playing an amusing game while moving about and possibly meeting someone were important attributes of Pokémon Go.
At least two colleges incorporated Pokémon Go into their fitness classes. Pokémon Go appeared to a valid tool for teaching fitness and relationship building. Answering questions such as the following made it a decision-oriented CI:

1. How could game designers incorporate these attributes of fitness and relationship building in their designs?
2. How could fitness and recreation instructors incorporate popular electronic games to achieve fitness and relationship building goals in a safe environment?

LEARNING OUTCOMES
In completing this assignment, students should be able to:

For fitness teaching and recreation:
1. Develop curricula that incorporate items that young people find attractive (LO 1)
2. Develop curricula that incorporates experiential learning directed at fitness (LO 2)
3. Develop curricula that incorporates experiential learning directed at relationship building (LO 3)
4. Develop curricula that minimizes risk to participants and the public (LO 4)

For game developers:
5. Develop games that encourage relationship building and movement as opposed to reclusiveness (LO 5)

APPLICATION
The CI is most appropriate for game design classes in information systems, fitness teaching in kinesiology or physical education, and recreation at the undergraduate level.

KEY WORDS
Pokémon Go, game design, relationship, exercise

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NDH Investment Group, LLC: A Tax Compliance and Research Case Study

Alli Purcell Hayes, North Central College

Abstract

The case study incorporates entity tax material and allows students to transform the theory learned in class into practical application of the law. Student skills of critical thinking, problem solving, and theory application are developed and enhanced through the completion of this case study. This teaching resource comprises an instructional case study to be used in the entity income tax course and designed to reinforce concepts and issues that students are likely to face in practice. The case describes the operations of a small rental real estate LLC facing a change in ownership. Students are asked to take the role of a tax practitioner, assisting their clients in not only tax compliance, but tax planning. It is flexible in that it could be used for a range of applications from solely to research IRC §754 exchanges and revaluations to a comprehensive two-year tax return preparation assignment with a client letter.

Learning Objectives

Upon successful completion of all parts of this case, students should be able to:

Tax Technical Learning Objectives:

1. Identify and apply sources of rental income and determine if and to the extent they are to be included in or excluded from an entity's gross taxable income
2. Understand the tax application of distributions from LLC's to and between their owners
3. Calculate tax implications of transactions between LLC's and their partners
4. Analyze IRC §754 elections, prepare the corresponding basis and distribution calculation
5. Expand tax research skills, including analyzing the IRC and other primary sources
6. Prepare a basic form 1065 partnership income tax return
7. Prepare professional quality work papers, calculations, and recommendations

Professional Learning Objectives:

1. Interact with team members to brainstorm and complete requirements
2. Use critical thinking and analytical skills to manage and evaluate data
3. Use information to suggest informed business decisions and recommendations to a client
4. Identify critical issues and conduct research to support analysis and recommendations
5. Effectively communicate analysis, findings, and recommendations to stakeholders

Application

This case is designed to be implemented in an entity taxation course that covers partnership taxation, planning, and tax research. Additionally, the case may be broken up, and a variation of requirements can be used depending on the skill set of the student audience.

Keywords

Tax Education, Tax Teaching Case, Compliance, Entity Tax, Tax Research, Section 754 Election

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Disgruntled Employee
Critical Incident Summary

Neil Tocher, Idaho State University
Dennis Krumwiede, Idaho State University

Abstract
This Decision based critical incident describes Robert's dilemma of how to handle a conflict between Dave, a longtime employee of Mountain top Construction (MTC), and Dave's supervisor John. The conflict emerged when John asked Dave how much MTC would need to pay Dave to get him to quit his job at MTC and instead operate his own business as a full time mechanic. John's suggestion was intended to help Dave see that all parties may be better off if Dave was running his own business and MTC could contract Dave's services, but Dave instead felt that he was being asked to resign immediately. The decision is complicated for Robert because Robert and John are both co-owners of the Business and Dave is possibly their most valued and loyal employee.

Learning outcomes
The learning outcomes of this critical incident are:
1. Students will analyze and compare interpersonal communication strategies which could be used to avoid and resolve miscommunications.
2. Students will analyze and contrast conflict resolution strategies which could be used to attempt to resolve the situation.
3. Students will explain how to generate and convince various stakeholders to follow coalition (i.e. win-win) solutions
4. Students will identify the influence that social competence may have on resolving difficult situations such as the one presented in the incident.

Application
This incident is appropriate for use in organization behavior, management, small business, and human resource management courses as well as other courses that focus on interpersonal communication and conflict resolution. major issues in the incident are conflict resolution, interpersonal communication, social competence, and coalition (i.e. win-win) solutions. Course discussions will want to spark creative thinking about approaches to resolving the situation and pondering strategies that would have avoided the miscommunication from ever happening. An epilogue near the end of the teaching note explains Robert's approach to resolving the miscommunication.

Key Words
Interpersonal Communication, Conflict Resolution, Social Competence, Cash flow, coalition solutions

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The Crossing Café: Midnight Madness

James Litton, Abilene Christian University

Abstract

Hannah is a student who agreed to take over and re-launch a struggling on-campus café as part of a new student-run business program at her university. She needed to decide on the café's menu, including both products and prices, before her 8:00 class the next morning. Hannah has conducted some initial research about different options but is pressed for time as the semester is about to start. She will need to calculate the impact of different pricing decisions, while also considering the project's limited capital and other unexpected problems making Hannah's decision more complicated.

Learning Outcomes

The objectives of this critical incident are as follows:

1. Demonstrate an ability to calculate a breakeven point
2. Analyze the impact of different product and pricing options and recommend a new menu
3. Evaluate whether the café presents a profitable business opportunity

Application

This critical incident can be used for courses in entrepreneurship and general business courses at the undergraduate level.

Key Words

Entrepreneurship, pricing, student-run business

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A CRAPPY DAY AT WORK

Matthew VanSchenkhof, University of Central Missouri
Brittney Estes, University of Central Missouri

ABSTRACT

Situational workplace emergencies occur frequently enough that the majority of future managers will encounter at least one in the first five years of their career. There are several factors to consider when handling difficult workplace emergencies, especially when other's safety and satisfaction is under consideration. Understanding environmental factors allows for prioritizing actions. Additionally, planning and implementing the procedures and training that should be in place prior to encountering a situational emergency allows for a workplace to respond appropriately.

LEARNING OUTCOMES

The learning outcomes of this critical incident are for students to be able to:

1. Recognize and prioritize reactions to emergency situations.
2. Assess situational factors and respond appropriately.
3. Develop protocols for responding to emergencies within unique populations.

APPLICATION

Instructors can use this incident in undergraduate hospitality, foodservice, geriatric care, or special population care courses focused on crisis management, operations, or customer service.

CONTACT

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Cultural Appropriation or Appreciation?
A Coldplay/Beyoncé Case Study

Maria A. Moore, Illinois State University
Veronica Arora, Illinois State University

SYNOPSIS

On January 29th 2016, Coldplay released a music video for their single, "Hymn for the Weekend." The video features Beyoncé, who plays a Bollywood actor adorning exotic Indian costumes, jewelry and henna. The video was shot on the streets of Mumbai and paints a picture of a clichéd India. Within 24 hours of its release the song drew criticism for cultural appropriation. A message on Twitter stated, "I don't even know what to say about this Coldplay video except that, can white rock bands please stop filming Holi videos in India." However, there were supporters who appreciated the video for showing a beautiful side of India to let the world know about Indian culture. This case raises important questions: Is it justifiable for one culture to represent another culture on a global platform? Is it possible to draw a line between cultural appropriation and cultural appreciation?

Learning Outcomes

In completing this assignment, students should be able to:

1. Identify the key elements in the case that lead to controversy.
2. Analyze the case through the specific theoretical lens of cross-cultural representation.
3. Evaluate the theoretical, legal, and ethical factors framing the case.
4. Discuss the impact of representing cultural identities in creative mediums.
5. Consider the unique aspects of music as a medium for cultural identity and cross-cultural understanding.

Application

This case is appropriate for use in courses of cross-cultural communication, intercultural communication, ethics, and media studies. Main issues that can also be addressed are cultural appropriation, cultural appreciation, and influence of music videos.

Key Words

Cultural appropriation, music videos, Coldplay, Indian culture, cultural appreciation

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To Consign or Not to Consign?

Jessica Johnson, Notre Dame of Maryland University
Lawrence Beyer, Notre Dame of Maryland University
Elizabeth H. Jones, Notre Dame of Maryland University

Abstract

Leslie Arbury, a young graduate student and avid bargain-hunter, noticed a growing societal trend of shopping on consignment. She also knew that many local retail stores offered a personal shopper option. The few consignment shops located in her area did not offer this option during the shopping experience, so she felt that adding a personal shopping preference to the consignment shopping experience would be a great benefit to customers and the market as a whole. Leslie must decide whether to pursue opening her own consignment boutique in the Towson, Maryland market, which would be the first to offer a personal shopping experience**.** Learners may disagree on which course of action would be the most beneficial to Leslie and potential consumers; thus, the case serves as a forum for evaluating several business strategies and perspectives that can be used as scope of focus to solve the dilemma.

Learning Outcomes

In completing this assignment, students should be able to:

1. Identify the stakeholders affected by Leslie's dilemma.
2. Evaluate the positive and negative aspects for introducing personal shopping into the current consignment market.
3. Analyze the financial feasibility of this venture. Include a break-even analysis, a cash budget, and a long-term NPV analysis to determine if Leslie should move forward with the development of a business plan.

Application

This critical incident is intended as a discussion in business decisions, with a particular focus on examining personal shopping in the consignment market. Learners are challenged to apply strategic thinking, planning and business decisions and may be used at undergraduate or graduate levels.

Key Words

Small business, entrepreneurship, planning, strategy, decision-making

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SEXUAL HARASSMENT IN THE WORKPLACE: A REVERSAL OF MISFORTUNE

Dr. Robert G. Edmonds
SUNY Maritime College

Summary:
This decision based critical incident reflects a real-life situation and was recounted to the author by the principal involved. Mike Edwards a HMO2, navy corpsman attached to the US Marines was near completion of his eight-year reserve commitment when he ran afoul of Master Chief Elaine Barnett and become the unwilling target of the master chief's harassment and sexual discrimination. Sexual harassment and discrimination is a very real problem faced not only by the private sector, but also by our nation's military institutions including the service men and women found in all branches of the armed forces.

Learning Outcomes:
After reading, studying and analyzing this critical incident students should be able to:

- Identify and categorize the various issues found in workplace sexual harassment
- Examine the role/perception that power plays in workplace sexual discrimination
- Evaluate a course of action to correct and minimize such activity in the workplace.

Application:
The CI is appropriate for use in undergraduate courses in Introduction to Business, Fundamentals of Management, Organizational Management, Small Business management, Human Resource Management and Business Law.

Key Words:
Sexual harassment, sexual discrimination, hostile work environment, quid pro quo, power in the workplace, Title VII, 1964 Civil Rights Act

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Fitbit: Fit for Endless Innovation?

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Alley Carpenter, Elmhurst College
Tyler York, Elmhurst College
Vitano Labadessa, Elmhurst College
Sondra Simpson, Elmhurst College

Abstract

Fitbit was an innovative company focused on using the newest wearable technology to help customers track activity, dieting, and sleep. With a strong emphasis on promoting the wellbeing of all their customers, they offered a wide range of methods their customers could track their progress. With an increase in number of competitors, Fitbit was seeing its market share decline in recent months. Fitbit had decided to come out with a new fashion line of products to help compete with their competitors. However, they were also finding a large number of customers stopped using their product within 6 months of purchasing the product. Fitbit was trying to figure out a way to change this by offering new features, more ways to engage customers with other Fitbit users, and their new accessory line. Fitbit's lofty goal was to become part of the lexicon of society.

Learning Outcomes

In completing this assignment, students should be able to:

1. Understand and apply the different types of innovation used in carrying out a company's strategic plan
2. Analyze the situational factors that play a role in a consumer's decision to purchase a Fitbit.
3. Analyze the importance of reference group influence and how it can affect the purchase decision-making process in both a positive and negative way.
4. Determine Fitbit's location on a perceptual map and the factors that go into where their products are placed.

Application

This is an innovation, consumer behavior and competitive product marketing case and was tested in an undergraduate consumer behavior course.

Key Words

Innovation, Consumer Buying Behavior, Reference Group, Competitive Perceptual Map, Wearable Technology

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Forum Credit Union:
Implementing a First-Time Home Buyer Program

Daniel H. McQuiston
Butler University

Abstract
Andy Mattingly, Chief Operating Officer of the FORUM Credit Union, has been tasked with the responsibility of developing a program to attract more First-Time Homebuyers (FTHB) to choose FORUM as the lending institution for their mortgage loan. FORUM is 'behind the curve' in offering such a program, and many other financial institutions have established one. Andy has at his disposal a fair amount of research on who their potential target markets might be as well as how some if these target markets go about choosing a mortgage lender. Andy much answer such questions as: Who would be our primary target audience(s)? How do they go about choosing a mortgage lender? Who is our main competition? How can we position ourselves against that competition to establish a competitive advantage? What tools of the marketing mix should we use to create that advantage?

Learning Outcomes
In completing this assignment, students should be able to:

1. Examine the process a service-oriented firm undertakes to develop a new product.
2. Study the factors that firm must consider in determining a positioning strategy for that product in the appropriate market place.
3. Understand the nuances of positioning a product for the millennial segment.
4. Examine the role that educating potential customers plays when marketing a new product.
5. Study the potential promotional strategies to appeal to millennials

Application
This case is most appropriate for undergraduate and graduate courses in marketing management, promotional strategy, and social media

Key Words
Promotional strategy, positioning, financial services

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Competing Values in Rural Maryland School District

Martha Lopez, Notre Dame of Maryland University
Margaret Koenig, Notre Dame of Maryland University
Elizabeth H. Jones, Notre Dame of Maryland University

Abstract
A local educational system is a complex organization that functions thanks to the efforts of many individuals. Leaders from the state government to the local county level work together by way of strategic planning. One miscalculated decision affects thousands of children and their families. One county in the state of Maryland is facing this exact issue today. A rural school district in Maryland, Carroll County, recently closed three schools and the realigned district lines – a succession of events traced back to a County government's myopic planning and execution.

Learning Outcomes
In completing this assignment, students should be able to:

1. Analyze the environmental and structural changes affecting public education in Carroll County, MD, and neighboring counties over the past 12 years.
2. Evaluate the strategic plans the Carroll County Board of Education has stated as well as implemented.
3. Identify the leadership and ethical issues that impacted stakeholders affected by Carroll County Board of Education's decision to downsize their schools based on the evidence of decreasing population and school funding.
4. Propose a final analysis based on two alternative outcomes (either shutdown more or less than three schools) centered on the result of Carroll County Board of Education's implementation of their strategic plan pertaining to downsizing based on the evidence presented earlier in this case study.

Application
This descriptive critical incident is useful in strategy classes in business, nonprofit management, education, and public policy course.

Key Words
Education policy, county government, strategy, strategic planning

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Ownership of a legal marijuana business: Obligations Of a Certified Management Accountant

Abstract
This critical incident is about a major dilemma facing a CMA and member of the Institute of Management Accountants (IMA). Ownership of this type of business, i.e. marijuana possession, production, and sales, is legal in specific states. However, the business is federally illegal. Yet, federal prosecutors have stated a hands-off approach to certain state-level legal enterprises. Is the accountant violating ethical principles of the *IMA Statement of Ethical Professional Practice?* This critical incident provides students opportunities to dig deeply into the *IMA Statement of Ethical Professional Practice* (the *IMA Statement*). Discussion questions cause students to compare principles and standards of the *IMA Statement*. Also, students are put into the position of providing a resolution to the dilemma as if it is their dilemma. It is of the no-right-answer genre. It provides critical thinking and reasoning opportunities because students cannot simply find answers and provide to instructors.

Learning Outcomes
In completing this assignment, students should be able to:

1. Discuss the content of the *IMA Statement*
2. Understand obligations of accountants
3. Compare federal versus state law on the topic of controlled substances
4. Evaluate an ethical dilemma when incomplete information is present
5. Internalize an ethical dilemma provided via a discussion question about what the student would do if in the case

Application
This critical incident is most appropriate for courses in accounting ethics, business ethics, business law, managerial and/or cost accounting

Key Words
IMA Statement of Ethical Professional Practice, ethics, marijuana, controlled substances

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“Cancellation” or Censorship?

Asbjorn Osland, San José State University
Nanette Clinch, San José State University

ABSTRACT

The play “N*GGER WETB*CK CH*NK” had been performed in 44 states as a comedic critique of stereotypes and race. It had been praised for its contributions to the dialogue on race relations. But the president of Cal State Long Beach thought that it lacked academic merit and it would not be used as a centerpiece for academic discussions on campus. She told the executive director of the Carpenter Center for the Performing Arts, Michele Roberge, to cancel the play scheduled for September 29, 2016. Roberge resigned after having led the center for 14 years.

Many millennial students were probably comfortable with the cancellation since the Pew Research report (Poushter, 2015, November 20) indicated that 40% believed one should avoid terms that might be offensive to minorities.

Should universities censor artistic performances that disparage minorities, even when done in a comedic fashion with minority actors with the intention of fostering dialogue on racial issues?

LEARNING OUTCOMES

In completing this assignment, students should be able to:

1. Evaluate the first amendment guaranteeing free speech in the context of discussion of race and ethnic relations in the US
2. Critique the millennials tolerance of censorship in contrast to the free speech movement started in Berkeley in the 1960s
3. Evaluate the CSULB president’s decision making in cancelling the play
4. Explain the social benefits of satire.

APPLICATION

This decision oriented incident is most appropriate for classes in ethics, business law, social responsibility, and gender studies.

KEY WORDS

Censorship, millennials, satire

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IS IT OK TO BID AGAIN

Britt M. Shirley, Ph.D.
The University of Tampa

SYNOPSIS

After reviewing proposals for a travel study course they were going to teach the following May, Stephen Bell and Brenda Sims chose the bid from Global Campus Tours. Before they could contact the winning bidder, they received a telephone call from Jerry at UniTours. Although the deadline for submitting proposals had passed, Jerry asked if he could review the successful proposal and revise his bid. Stephen and Brenda had worked with Jerry and UniTours in the past with positive results. However, they were concerned about the ethics of allowing one provider to review another company's proposal and revise its bid after the deadline.

LEARNING OUTCOMES

The objectives of this case are to:

1. Decide if it would be ethical to allow one company to revise a bid that it had submitted without giving other companies the same opportunity.
2. Identify who the stakeholders are in a situation and the impact a decision would have on each of them.
3. Decide how decision makers should respond to an ethical dilemma.

APPLICATION

This case was designed for use in an Introduction to Business course that included a chapter on Ethics and Social Responsibility. The case could also be used in an Ethics course to give students an opportunity to apply the concepts of ethical behavior and stakeholder analysis.

KEY WORDS

Ethics

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Beansie's or Bust: The Challenges of Managing a Food Truck Business

Paul E. Olsen, Saint Michael's College
Connor Mitchell, Saint Michael's College

Abstract
Beansie's Bus had been located seasonally in Burlington Vermont's Battery Park since 1944. As the owner and only full-time employee, Jay LaShombe ordered supplies, greeted customers, prepared food, hired part-time staff, cleaned and stocked the bus, and was responsible for complying with state laws and health department regulations. LaShombe, a part-time MBA student, was aware of the increased popularity of food trucks and hoped to capitalize on the trend. While Beansie's menu hadn't change much since 1944 and included hamburgers, hot dogs, French fries, and soft serve ice cream, newer food trucks served gourmet food items. LaShombe wondered how he could attract new customers. Would his menu need to change? Should he consider purchasing and staffing another truck? How could he reach younger customers? LaShombe was ready to apply what he learned in his graduate *Marketing* course to grow his business.

Learning Outcomes
In completing this assignment, students should be able to:

1. Evaluate the environment of small business
2. Conduct a SWOT analysis
3. Recommend strategies to grow a small business business
4. Apply marketing principles and concepts to small business.

Application
This decision-based critical incident is designed for use in undergraduate Marketing, Small Business Management, Hospitality Management, or Introduction to Business courses

Key Words
Marketing, small business management, food truck, hospitality management

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Apple, Inc. and Joplin, Missouri: An ethics critical incident

Abstract:
On May 22, 2011, a tornado destroyed a large portion of Joplin, Missouri. The Joplin tornado was the deadliest in the U.S. since modern record keeping began in 1950 by the National Weather Service. Six schools, including the city's only high school, were destroyed. Insurance would cover construction of the new buildings but would not replace textbooks. Joplin was considered an "Apple District" and used Apple computers extensively to educate their students. Thus, school officials asked Apple, Inc. to assist them in purchasing new Macs to replace their destroyed textbooks with online resources. Apple, Inc., refused to grant Joplin School District additional assistance. However, the United Arab Emirates (UAE) stepped in and agreed to donate $500,000 upfront and $500,000 in matched donations so the school district could purchase their MacBook laptops. We now know Apple was engaged in stock back-dating and off-shore tax shelters during this time period. Did Apple's actions support the widely held belief published in *Forbes* during 2011 that Apple, Inc., was the best American brand? Did the United Arab Emirates' philanthropic actions contradict American beliefs about Arab states during this same time period?

Learning Outcomes:
In completing this assignment, students should be able to:

1. Develop criteria for assessing an organization's social responsibilities.
2. Evaluate specific actions of Apple, Inc., and the UAE to determine if they were behaving as global citizens.
3. Identify the motivations driving Apple, Inc., and the UAE in their decisions concerning Joplin, Missouri.
4. Discuss whether each organization's actions were driven primarily by an internally focused purpose, externally focused purpose or a balance of both.

Application:
This critical incident is most appropriate for courses in ethics, business ethics, organizational social responsibilities, and public policy.

Key Words:
social responsibility, philanthropy, global citizen, organizations

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Embryo Abstracts

$4 Million Dollar Donation to College: What not to do

Synopsis - Embryo Critical Incident

According to a recent newspaper article, a long-time employee of a northeast American state university gifted $4 million to his alma mater. The College president was quoted in the newspaper, “His generous gift allows us to address a number of university priorities. As an alumnus Bob would be pleased to know that a majority of his estate, $2.5 million, will help to launch an expanded and centrally located career center for our students and alumni. We are committed to providing the resources needed to ensure every student achieves professional success and Bob’s gift will play a major role in that effort.” About $1 million will be used to upgrade a sports scoreboard for the new football stadium. Of the $4 million-dollar gift, the donor identified and required that $100,000 will be used to improve a multimedia room in the library, the other amounts will be for student scholarships and support for staff members who plan to continue their studies in library science. The local newspaper further quoted the vice president for advancement and president of the College Foundation that “Unrestricted gifts give the university the ability to use the funds for our highest priorities and emerging opportunities. This is an extraordinary gift that comes at a critical time for launching a number of initiatives that are only able to move forward because of his generosity.” When the news of how the college allocated the $4 million windfall, there were many people critical of the administration’s judgment, including the State’s Governor that centered especially on the $1 million allocated for the sports arena scoreboard

Learning Objectives

1. To enumerate possible ways to divide up a $4 million estate donated, except for the $100,000 that was designated.
2. To prioritize the many different ways the $4 million can be allocated in the State College.
3. To demonstrate ethical understanding and guidance in distributing the estate by selecting potential beneficiaries of the $4 million.
4. To propose an equitable solution to the competing and conflicting demands for the unrestricted amount totaling $3.9 million.

Application

This critical incident could be used in an Organizational Behavior course that deals with group decision-making and in a Business Ethics course that deals with equitable solutions for competing and conflicting demands. The objective in both courses is for students to develop a framework for an ethical group decision-making process related to multimillion-dollar donations to organizations.

Key Words

Ethics, stakeholders, equity, and decision making

Contact

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The Bad Apple That Spoiled the Bunch

Abstract
Shortly after the hiring of a 57 year-old transgender professional, the new hire exhibited mannerisms that troubled coworkers. Despite expressed concerns, the manager decided to retain the employee for the duration of the probation period. During that time, the employee met all performance criteria. Consequently, the division's executive team granted the employee a permanent position. Vocally citing idiosyncratic needs and flaunting personal achievements, the employee demanded special work accommodations. Coordinating with division executives, the manager rearranged unit's budget allocations and teams' workloads to meet the demands. Thereafter, the unit's work meetings became superficial and its performance gradually dropped. Social conversations among coworkers ceased as they evaded the employee. Several executives informally told the manager that the employee conveyed to them a sense of isolation and hostility in the department while alluding to age and gender factors. A few days later, and to the manager's surprise, the employee applied for promotion.

Learning Outcomes
In completing this assignment, students should be able to:

1. List, define, and analyze core human resource functions and processes.
2. List, define, and analyze key team dynamics processes and justice/fairness perspectives.
3. List, define, analyze, and evaluate the ethical and legal considerations relating to diversity and discrimination in the workplace.
4. Evaluate managerial decision-making and action presented in the case.
5. Formulate and evaluate managerial recommendations for addressing the dilemma presented in the case.
6. Investigate and reflect on their personal reactions to the information presented in the case.

Application
The case is most appropriate for undergraduate-level courses in management, human resource management, organizational behavior, leadership, business ethics, and gender and diversity.

Key Words
human resource management, gender, age, diversity, discrimination, justice, fairness

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When a Political Campaign Drags Your Brand on Social Media: Embryo Critical Incident

Carrie S Trimble, Millikin University

Abstract

Skittles maintains a very light-hearted, visually-oriented presence on Twitter, but amidst a rancorous presidential election campaign, the brand, by name and by image, was associated with death and terrorism in a tweet meant to engender fear. How should Skittles, or any brand, respond when user-generated content is drastically "off-brand"?

Learning Outcomes

Upon completion of the assignment, students should be able to:

1. Recommend a response strategy
2. Identify the risks and rewards of encouraging user-generated content
3. Determine when off-brand posts should be addressed or ignored
4. Determine when a response should be brand-specific or company-wide

Application

This critical incident is appropriate for courses in social media, IMC campaigns, political advertising, public relations, crisis management, and business ethics.

Key Words

Skittles, refugees, political advertising, crisis management

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TALKIN' TRASH

Embryo Case Study Summary

Charles Murray, The College of Saint Rose

Abstract
This embryo case study describes how payment structures for solid waste disposal affect incentives and ultimately outcomes. A flat-fee design may serve some residents' self-interests, but may not be socially desirable. By redesigning the payment structure so that residents pay a per-unit fee for disposal, it is possible to align self-interest and public interest. Moreover, implementing any change is likely to face resistance, especially from those who benefit from the *status quo*.

Learning Objectives

1. To illustrate that decisions are based on rational self-interest.
2. To illustrate that incentives matter.
3. To illustrate that changing incentives can significantly change outcomes.
4. To illustrate that all outcomes, even desirable ones, have advantages and disadvantages.
5. To challenge students to question the status quo, consider alternatives and decide whether to work without pay to implement an idea they believe in.

Application
This case study is appropriate for use in introductory and advanced microeconomics courses (such as public finance or environmental economics) that involve decision making based on rational self-interest. Major issues in the case include rational self-interest, incentives, public interest, pricing schemes, and designing programs so as to align self-interests with public interest. Student discussion should create an awareness of how decisions are made, the consequences of such decisions, and that if incentives are changed, behavior changes. Student discussion should also encourage challenging the status quo, particularly for causes they believe in.

Key Words
flat-fee, per-unit fee, incentives, rational self-interest, public interest, solid waste disposal

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Sustainable Alternative Lighting: A Marketing Analysis

Case Overview

Sustainable Alternative Lighting (SALt), a startup in the Philippines, creates handheld lamps that use a glass of water and two tablespoons of salt to activate a battery that powers light. This self-defined “social movement” aims to provide poverty stricken regions in the Philippines with an inexpensive alternative energy solution. The company was founded in 2014 by Aisa Mijeno, an engineering faculty at De La Salle University, and her brother her brother, Raphael Mijeno, who has a finance and accounting background. Since its founding, SALt has gained global recognition, winning 20 awards in the Philippines and around the world. However, during its first two years of operation, the company has seen little progress in production of this much-needed lighting alternative. Additionally, the introduction of alternative energy sources from potatoes to solar power could prove to be highly competitive. The company is faced with a number of questions that need to be addressed. How will SALt appeal to its primary target market of donors in order to sustain production for the poverty stricken end-users? What position should SALt take compared with other alternative lighting in the market?

This case is most applicable to the study of marketing strategy, particularly as it applies to new product introduction in an international context. This case is most applicable to a marketing capstone, international business course, or MBA course in marketing, as it requires an application of high-level skills like problem identification, critical thinking and analysis, decision-making, problem solving, and realistic implementation.

Research Methods

Information about SALt was found through secondary sources. The authors have tried to contact the owners on multiple occasions, but have received no inclination of willingness to collaborate.

Learning Outcomes

This case analysis will allow students to:

1. Assess market conditions and competitive landscape for new product introduction.
2. Identify the target market(s) and distinct position to capture this market compared with competition.
3. Identify all issues and, specifically, the main marketing problem or challenge of the firm.
4. Identify strategic alternatives to addressing the main problem of the firm.
5. Decide upon and defend a viable strategic solution to the problem previously identified.
6. Lay out a marketing mix that logically implements the chosen solution.

Key Words

marketing strategy, international business, problem identification, critical thinking

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WHO OWNS THE RECIPES?

Brad Reid, Chuck Capps and Andy Borchers
Lipscomb University

Summary:
This **descriptive** critical incident focuses upon legal, ethical, and marketing issues in the healthy food recipes (cookbooks) industry. On two occasions, Elisabeth Hasselbeck (2009, *The G Free Diet)* and (2012, *Deliciously G-Free)* published cookbooks that, according to Susan Hassett were infringements upon her 2008 copyrighted cookbook, *Living with Celiac Disease.* On both occasions, Ms. Hassett filed lawsuits asserting Ms. Hasselbeck infringed upon copyright protections (former case) and used her (Hassett's) "framework structure," "recipes," "information," and "compilation of research" (latter case). The courts found in favor of Ms. Hasselbeck in both instances. The CI encourages students to answer how chefs and publishers of recipes should consider the legal and ethical implications of producing works of food art similar to previously distributed products.

Learning Outcomes:
The learning objectives of this critical incident are for students to:

1. Understand major legal issues associated with recipes, copyright, and plagiarism when applied to the food production industry.
2. Analyze strategies for authors considering publication of recipes using sources with similar information.
3. Evaluate moral and ethical issues associated with use of and infringement upon personal recipes.

Application:
Instructors can use this incident primarily in marketing, public relations, business law and ethics classes. Students in undergraduate can especially benefit from this critical incident.

Key Words:
Intellectual property, Copyright, Trade Secret

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POTENTIAL PITFALLS OF "POKEMON GO"

AN EMBRYO CASE

Michael Hogg, Tulane University
Karen Foust, Tulane University
Christine P. Smith, Tulane University

Synopsis:
Ask any group of children in the eight to eleven-year-old age group what their favorite electronic game is and you will probably hear a resounding "POKEMON GO!" For that matter, this game has captured the fancy of players of all ages, genders and backgrounds. This embryo case attempts to provoke students to explore the potential pitfalls of Pokémon GO despite its phenomenal popular success.

Topic 1: Ethics
What ethical issues arise with the use of Pokémon GO, e.g. monetization, safety, discrimination, privacy, etc?

Topic 2: Torts
What torts potentially arise from the use of Pokémon GO?

Topic 3: Intellectual Property
Your clients assert that the Pokémon GO app presents intellectual property issues. However, your clients want to make sure that they address all intellectual property concerns. How would you advise them?

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GOMC – an experiential approach to teaching Digital Marketing

Kasia Firlej, Purdue University Northwest

Abstract

This case explores Google Online Marketing Challenge as a tool to allow students to participate in an experiential learning project in the area of Digital Marketing. It evaluates the stakeholders and their responsibilities and benefits while participating in the project. It also looks at the challenges of managing those stakeholder relationships and outcome expectations. Google Online Marketing Challenge consists of building a Google Adwords marketing campaign and the use of Google Analytics in order to track website traffic, consumer behavior and campaign effectiveness.

Learning Outcomes

1. What types of benefits can be gained by educators, students, community partners, business advisors and employers as a result of participating in GOMC?
2. What type of conflicts would one expect while involving numerous parties with various objectives? How can these be overcome?
3. How can one measure the satisfaction level of each stakeholder in an effective manner?

Application

The case has a difficulty level appropriate for junior level students. The case is designed to be taught in one class hour and is expected to require two hours of preparation by students.

Key Words

Google, Adwords, Analytics, stakeholders, digital marketing, experiential learning

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C. W. PENCIL ENTERPRISE: SELLING PENCILS IN THE TWENTY-FIRST CENTURY

Patrick L. Schultz, University of North Dakota
Nikolaus T. Butz, University of Wisconsin – Stevens Point
Kevin Cooper, University of North Dakota
Kristin Powell, University of North Dakota

Summary:
Graphite deposits were first discovered in 1564 near the lake-side town of Borrowdale, England. One hundred years later, the first mass-produced pencils were manufactured in Nuremberg, Germany, giving birth to a new industry. Many writers today, however, reach for more modern offering, such as mechanical pencils, ball point pens, or digital styluses. This has not discouraged Caroline Weaver from opening C.W. Pencil Enterprise, a brick-and-mortar pencil boutique in the heart of Manhattan's Lower East Side. The store is stocked with a generous selection of pencils ranging in price from $0.30 to $53.00 per instrument. Pencils are displayed upright in glass jars labeled with their country of origin. Caroline is hoping to attract customers who, in spite of ever-present technological change, enjoying having and using something that's not going anywhere. Pencil collectors and enthusiasts aside, Caroline faces the difficult challenge of building a business around a mature, commodity product.

Learning Outcomes:
After reading, studying, and analyzing this critical incident, students should be able to:

- Understand the ways that a business can be built around a mature, commodity product.
- Assess the implications of a focus strategy.
- Identify the challenges facing a business in the birth stage of the life cycle.
- Assess the elements of value that a business creates and the needs they address.
- Understand how social media can be used to build a new business.

Application:
The CI is appropriate for use in undergraduate courses in strategic management, entrepreneurship, marketing, small business management, new venture development, and principles of management or marketing.

Key Words:
strategic management, Porter's generic strategies, new venture development, small business, product life cycle, social media marketing

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AN UNWELCOMED MARRIAGE PROPOSAL

Embryo Case Summary

Brosh M. Teucher, Saint Michael's College

Abstract

While engaging in a hallway conversion, two teammates discussed the assignment and distribution of the team's new tasks. The senior coworker attempted to offload the extra work onto a newly hired coworker, and added a comment that had abusive and sexual overtones. Incidentally, a junior employee working in a nearby workspace overheard the conversation. The newly hired employee brought the content of the conversation to the attention of the unit manger. In return, the manager offered advice on how to handle workload distribution. Shortly after, the junior employee who overheard the conversation also reported it to the manager. Yet, this employee expressed emotional unease with the intent of the conversation and with the comment made by the senior employee. Moreover, the manager noted that this employee deliberately avoided any contact with the senior employee. After the two employees reported the conversation, the manager contemplated the appropriate response.

Learning Outcomes

In completing this assignment, students should be able to:

1. List, define, analyze, and evaluate the ethical and legal considerations relating to sexual harassment in the workplace.
2. Evaluate managerial decision-making and action presented in the case.
3. Formulate and evaluate managerial recommendations for addressing the dilemma presented in the case.
4. Investigate and reflect on their personal reactions to the information presented in the case.

Application

The case is most appropriate for undergraduate-level courses in management, human resource management, organizational behavior, business ethics, and gender and diversity.

Key Words

Human Resource Management, Diversity, Sexual Harassment, Gender, Bias, Stereotype

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THE CHALLENGE OF DOING BUSINESS IN NORTH CAROLINA

Embryo Case Summary

Brosh M. Teucher, Saint Michael's College

Abstract
This case describes the challenges that North Carolina's business community faced following the passage of House Bill 2 - Public Facilities Privacy & Security Act, Session Law 2016-3 (HB2) on March 23, 2016. HB2 required bathrooms in public facilities to be used by people based on the gender listed on their birth certificate. It also prohibited local communities from enacting local non-discrimination laws. The passage of HB2 lead to a broad backlash across the US and many out-of-state businesses postponed or withdrew activities in North Carolina. This created both immediate and lagged negative effects on North Carolina's economy and business community. The exchange of lawsuits on May 9, 2016 between North Carolina's Governor Pat McCrory and the US Justice Department intensified both the legal ambiguity and backlash reaction. Students are asked to recommend a course of action, if any, North Carolinas' businesses should take in response to the situation.

Learning Outcomes
In completing this assignment, students should be able to:
1. List, define, analyze, and evaluate the ethical and legal considerations relating to diversity and discrimination in the workplace.
2. List, define, and analyze key stakeholder groups' interests and positions.
3. List, define, analyze, and evaluate approaches to strategy formulation and execution relating to the business challenges presented in the case.
4. Formulate and evaluate managerial recommendations for the North Carolina's business community.
5. Formulate and evaluate managerial recommendations for national and international/multinational organizations that operate in or conduct business with North Carolina's business community.
6. Investigate and reflect on their personal reactions to the information presented in the case.

Application
The case is most appropriate for undergraduate-level courses in management, human resource management, organizational behavior, strategy, business law, and gender and diversity.

Key Words
Human Resource Management, Diversity, Discrimination, Strategy, Government, Law

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K9 University and the Personal Protection Dog

Dr. Clifton D. Petty

Drury University

Summary:
This embryo case is based on the real-life business known as K9 University, an Oklahoma City company that competes in the growing market for such professional training as law enforcement (K9 unit), search and rescue, and drug sniffing. In addition, K9 offers training to the retail markets for service, therapy, and obedience. This case is focused on the strategic and corporate responsibility issues associated with training dogs for protection services. A well-trained personal protection dog is a formidable form of security. But such training is controversial and costly. The author is seeking input with respect to the research agenda and framing of the case (i.e., decision point).

Learning Outcomes:
Initial possibilities for learning outcomes of this case include:

- Students should be able to identify the key corporate responsibility issues associated providing personal protection and K9 dog training
- Analyze the industry and market dynamics for specialized dog training services, including the major driving forces and potential risks
- Evaluate a course of action in response to a particular decision point (to be developed and refined)

Application:
When completed this case will be appropriate for use in undergraduate courses in Strategic Management, Business and Society, and Small Business Management.

Key Words:
Business Strategy, Corporate Social Responsibility, Small Business Management

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Software in the Saudi Souk
An Embryo Case Summary

James E. Weber, St. Cloud State University
Paula S. Weber, St Cloud State University
Martin Breaker, St. Cloud State University

Synopsis:
Dan Brown, a relatively junior employee, was chosen over more senior female and Jewish colleagues, to participate in a RFP response by his company for a software and maintenance contract with the government in the Kingdom of Saudi Arabia. While wandering around the old Souk (marketplace) in Riyadh, he enters a store and is offered software that his department greatly wants at an unbelievably low price, less than 5% of the list price. Certain that there is something wrong with the deal, he contacts his supervisor back home, explains the situation, and is told to buy the software and be reimbursed when he returns home.

Learning Outcomes:
The objectives of the case will be:
1. Students will identify different ethical and legal issues in the case
2. Students will identify stakeholders and their different ethical perspectives
3. Students will suggest various solutions and analyze the ethical implications of each solution.
4. Students will suggest a defensible course of action for Dan Brown.

Application:
This case in intended for assessment purposes in a capstone class for AACSB accreditation. It might also be useful for courses in ethics, law, corporate social responsibility, etc.

Key Words:
Ethical perspectives, stakeholder analysis, ethical versus legal responsibility

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Panel Summaries

Panel Discussion Proposal: Create a Digital SCR Case Pack for Your Students
Panel leader: Elizabeth Jones, and any of the journal editors or board members that want to join.
Background: The SCR board requested a session on how to use various publisher platforms to create digital case packs for students to purchase. Income from permission to use SCR cases and teaching notes is a major source of income for SCR. While teachers can always contract the SCR Executive Director to arrange for permission and payment, SCR case permissions are also available through various publisher services from McGraw-Hill, Xanedu, and others. This session will provide step-by-step instructions on how to use the various platforms to quickly and easily create standalone digital case packs or include them in other customized course material packages that students can pay for and download with ease.
Contact person:
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An Examination of Cases in the Classroom: How Faculty Use Case Studies for Teaching

Michael H. Kennedy, East Carolina University
Leigh Cellucci, East Carolina University
Cara Peters, Winthrop University
Eric Woodruff, East Carolina University

Abstract

There is little research that examines how professors are using cases as experiential learning tools. The purpose of this study was to survey faculty about their usage of cases in the classroom. Results from a survey of members of the Society for Case Research reaffirmed the value that faculty place on using cases. Respondents reported that they found cases helped with exposing students to real world business problems, developed critical thinking skills and reinforced teamwork skills. Challenges reported by faculty included that students need to adequately prepare for case learning and they do not always fully participate in class discussion. Faculty also stated that they value the epilogue, among other aspects of the teaching note, and desire to have supplemental materials be made available. Implications of the findings for future research are also discussed.

Journal of Critical Incidents Update and Changes

Elizabeth Jones
Tim Redmer
New Associate Editor

The Journal of Critical Incidents has been published by the Society for Case Research at the end of each calendar year for nine years. Over the last six years Tim Brotherton has been editor and Tim Redmer has been Associate Editor. This last year has been a transition as Tim Brotherton had to step down due to illness and Tim Redmer is retiring. Elizabeth Jones has assumed the role as editor and we are currently in the process of identifying an associate editor. In addition to all this change in leadership, the organization and journal is facing new challenges in publication and accreditation requirements. Our desire is to remain as a journal as a viable option to first-time authors and those needing to enter the publication arena while at the same time retaining the high quality publication standards promoted by the Society for Case Research. The Journal of Critical Incidents also remains at the forefront of the increasing demand for shorter case studies, critical incidents, and intends to retain that position of leadership while maintaining quality and positive recognition.

Topic Outline

Where we have been
The transition period
New challenges regarding standards and accreditation
How we intend to meet challenges through the transition
What to expect in the submission and review process
How we go about getting to an accepted publication

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Brosh M. Teucher, Saint Michael's College
Carrie S. Trimble, Millikin University
Christine L. Kuglin, Metropolitan State University of Denver
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Joseph Trendowski, Valparaiso University
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