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SCR President’s Note

I first want to thank the SCR members. You make our organization active, worthy, and professional. I am honored to have served as President for 2015-16.

A sincere thank you to Andy Borchers for his work to ensure a very successful Summer Workshop. The people at Lipscomb University welcomed us to their campus, and we had ample opportunities to exchange ideas to help researchers with their cases. A good time was had at the Grand Ole Opry, too. Well done!

Neil Tocher is also to be thanked. He has been diligently encouraging us to participate in our Annual Meeting (MBAA Chicago—13-15 April 2016). I look forward to seeing you there.

Kay Hodge is to be recognized as she is busy preparing for the 2016 Summer Workshop. She has a full schedule of events lined up for us; so, make plans to attend 14-16 July, 2016 in Kearney, Nebraska. You will be hearing from Kay about the submission process.

Amanda Weed and Craig Davis are to be commended for their work on “SCR Manuscript Guidelines for Authors.” Please take a look at their fine work at www.sfcr.org.

Joanne Tokle has assumed the role of Executive Director, and she is the epitome of expert knowledge and professionalism. Karen Foust has served steadfastly as our Treasurer. She also is the epitome of expert knowledge and professionalism. Thank you, Joanne and Karen! SCR is better because of you two.

Our editors and co-editors for the journals should be recognized as well. I enjoy the work for the Journal of Case Studies, and I thank you for allowing me to serve as editor. Appreciation goes to Kay Hodge, Craig Davis, Cara Peters, Tim Brotherton, and Tim Redmer for their work on the SCR journals: Business Case Journal, Journal of Case Studies, and Journal of Critical Incidents.

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. Some highlights of the work conducted include:

• We voted and approved that cases and critical incidents may be submitted anytime throughout the year.
• We voted and approved that it is not mandatory that a case or critical incident be presented at the Annual Meeting or the Summer Workshop to be considered for publication. We voted and approved that cases and critical incidents may be presented at either the Annual Meeting or the Summer Workshop.
• We voted and approved to have legal advice regarding our constitution, by-laws, and have our publication process reviewed. In particular, we asked to have our copyright and publication release language reviewed. We have engaged the law firm of Ward and Smith, P.A. to assist us with this important task. I shall report on this work to the Board and to the members at our Annual Business Meeting in Chicago at MBAA, 13-15 April 2016.

It has been an honor to serve.

Best and thanks,

Leigh W. Cellucci, PhD
President 2015-2016
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 Vice President 2016 Program

Greetings and welcome to the 2016 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 Vice President 2016 Program
Idaho State University

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SCR 2015-2016 OFFICERS AND BOARD MEMBERS
President: Leigh W. Cellucci
Dept of Health Serv. & Info. Mgmt.
4340H Hlth. Sciences Bldg., Stop 668
East Carolina University
Greenville, NC 27858
(252) 744-6072 (office)
(252) 702-3480 (cell)
celluccie@ecu.edu

Vice President-Program 2016:
Neil Tocher
Dept. of Management
921 S 8th Ave Stop 8020
Idaho State University
Pocatello, ID 83209-8020
(208) 282-3588

Executive Director:
Joanne Tokle (2015)
Associate Dean
College of Business
Idaho State University
Pocatello, ID 83209-8020
(208) 282-2934
tokljoan@isu.edu

At Large Directors:
Patrick Schultz (2016)
Gamble Hall Room 330 L
293 Centennial Drive Stop 8377
University of North Dakota
Grand Forks, ND 58202-8377
(701) 777-4148
Patrick.schultz@und.edu

Jeremy O’Connor (2016)
Helzberg School of Management
Rockhurst University
1100 Rockhurst Road
Kansas City, MO 64111
(913) 832-8708
jeremy.oconnor@rockhurst.edu

SCS Publication Editors:
Editor, Business Case Journal: Craig Davis
E. W. Scripps Sch. of Journalism
Scripps Hall 210
Ohio University
Athens, OH 45701
(740) 593-2605
davisc7@ohio.edu

Editor, Journal of Cases Studies: Leigh W. Cellucci
Dept of Health Serv. & Info. Mgmt.
4340H Hlth. Sciences Bldg., Stop 668
East Carolina University
Greenville, NC 27858
(252) 744-6072 (office)
(740) 593-2605 (cell)
celluccie@ecu.edu

Editor, Journal of Critical Incidents: Tim Brotherton
Department of Marketing
Ferris State University
Big Rapids, MI 49307
(231) 591-2471
jci@ferris.edu
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
What Should San Jose Do About the Erotic Massage Parlors?

Asbjorn Osland, San Jose State University
Charles P. Wilson, Rhode Island College

SYNOPSIS
There were around 300 erotic massage parlors in San Jose, CA. With at least three young women associated with each, that meant that around 1,200 people, including the owners, were involved. The City of San Jose planned to ensure that the massage parlors were not fronts for prostitution but only assigned two police officers to the task. Massage parlors typically charged for the massage, which was split between the house and the masseuse, and the masseuse kept tips, which could involve sexual activity although this was not always true; some were simply amateurish masseuses, not prostitutes. Should the authorities continue to close down the more flagrant centers of prostitution, one by one, based on citizen complaints? Or should they launch a massive and sweeping effort to close all massage parlors operating without certified massage therapists? Superbowl 50 was coming up (2/7/2016) in a neighboring city.

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

1. Create a plan for the City of San Jose to offer masseuses more education and training so that they didn’t feel trapped in the massage industry.
2. Evaluate if the City should launch an aggressive crack down. Estimate the consequences.
3. Evaluate the potential police response.

APPLICATION
The case could be used in Business and Society (i.e., role of illicit industries in society) and Criminal Justice Studies (i.e., how to enforce laws through regulations as opposed to heavy handed police action).

KEY WORDS
erotic massage parlor, vice, prostitution

CONTACT
Asbjorn Osland, School of Global Innovation & Leadership, Box 1064, San Jose State University, San Jose, CA 95192-0164. Email asbjorn.osland@sjsu.edu. Phone 408-924-3574.
Monica’s Designer Handbags: 
Creative Marketing Decision-making Based on Financial Analysis

Michael T. Manion, University of Wisconsin – Parkside 
Karen Crooker, University of Wisconsin – Parkside 
Peter Knight, University of Wisconsin – Parkside

SYNOPSIS
Monica learned much about the designer apparel trade as an intern with a major retailer, so she started her own designer handbag business, selling through independent retailers. She practiced making sound marketing decisions using financial analysis techniques that she had learned in college. These techniques proved useful to Monica when a regional discount chain offered a deal to sell her handbags through their stores on a trial basis. She was faced with a tough decision to accept the deal, reject it, or renegotiate it on mutually acceptable terms. Students are asked to analyze case data and to advise Monica on how to proceed with the prospective deal.

LEARNING OBJECTIVES
After reading this case and solving the problems posed in the Questions, students should be able to:

1. Calculate and explain the following concepts: wholesale price, contribution margin, markup, breakeven, and profit margin.
2. Demonstrate an understanding of retailer and distributor margins, fixed costs, profit impact, and market share.
3. Evaluate the financial impact of alternative pricing scenarios, a potential expansion opportunity, or changing from one distribution channel to another, and
4. Develop realistic, acceptable offers and counter offers.

APPLICATION
This brief case is a refresher exercise in quantitative financial analysis techniques in support of marketing decision making skills. It is intended for use in undergraduate marketing courses, including retail management and product management, and MBA marketing courses. It is suitable for online or traditional classroom settings.

KEYWORDS
Designer apparel industry, Marketing decision-making, Financial analysis techniques, Pricing offers and counter-offers, Retail trade channels.

CONTACT
Michael T. Manion, College of Business, Economics, and Computing, University of Wisconsin – Parkside, 900 Wood Road, P. O. Box 2000, Kenosha, WI 53141-2000.
Email: Manion@UWP.edu. Phone: 262-308-7373
Kim Hamel and Her 90-Day Plan

Dawn E. Chandler, Queens University of Charlotte

Steven Cox, Queens University of Charlotte

Abstract
Kim Hamel was a high-achieving female law enforcement agent who had recently been promoted to a lieutenant’s role, one of the highest-ranking positions in her department. She was only the second female in the department’s history, nearly 100 years, to achieve the rank. While she had been employed with the department for over 20 years, she knew that everyone would be watching her closely in the role, forming impressions immediately about her ability to lead and impact change in the City and the force. Having heard about the notion of a 90-day plan of key activities to undertake in order to positively influence impressions and secure early wins and legitimacy and credibility, Kim begin to muse over creating one. What were the key things she needed to do in the first 90 days of her new job to ensure lasting success in it? Who should she seek to influence and how? What activities were the more crucial to the plan?

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

1. Recognize the importance of early career transitions actions on later ability to succeed in a role.
2. Create a career development transition plan that includes a number of relevant considerations, including leadership approach, relationship building and management, gender issues, learning, and gaining power and influence.
3. Identify gender barriers and challenges that need to be accounted for in a 90-day plan.
4. Apply the notion of a 90-day plan to a position of interest to them.

Application
The case is appropriate for upper-level undergraduate courses in organizational behavior, principles of management, career development, leadership, and gender and diversity.
A TURBAN AND A KIRPAN: THE UNFAMILIAR STORY OF A SIKH MAN

Critical Incident Summary

Issam Ghazzawi, University of La Verne
Tahil Sharma, University of La Verne

Abstract
This critical incident describes a conflict of a long haul truck driver—a devoted Sikh, when was pulled over by police officers in Pike County, Mississippi as he was driving with a flat tire. He was subjected to a series of degrading remarks and events because of his minority faith and ethnicity. Mr. Singh wore a turban and carried a kirpan, a small spiritual sword (Ceremonial sword), as an article of faith to remind Sikhs of their obligations to justice.

When he returned to Mississippi for his court date, the Judge ejected him because he did not like Mr. Singh’s turban. Moreover, ACLU attorneys asserted that because of Mr. Singh’s refusal to remove his turban, he was forced to wait several hours before he was allowed in the courtroom to plead guilty and pay a fine. The U.S. Department of Justice intervened, investigated the case, and offered to close its federal investigation if Pike County revised its nondiscrimination policy and implement sensitivity training. The Pike County Board of Supervisors met to decide what to do.

Learning Objectives
At the completion of this case, the student will be able to:
1. Understand, define, and explain the subject of religious freedom and challenges that face diversity in the workplace.
2. Understand the subjects of ethics, justice, and fair treatment at work.
3. Define and explain the US Civil Rights Act and other anti-discrimination legislation.

Application
This incident is appropriate for use in both introductory and advanced courses in diversity, interfaith, culture, management and in other courses that focus on interpersonal communication and conflict resolution. It is intended for the application of concepts learned in the classroom and designed to complement knowledge derived from concepts in multiculturalism, and diversity/interfaith issues in management. This case can help the instructor to add more relevant questions to a chosen subject by viewing the details provided. In other words, it seeks to provide an applied, hands-on format for students to increase their understanding of the topics via review, research, and analysis of this unfamiliar situation, its stakeholders, multiculturalism, pluralism, and cultural diversity issues in the workplace.

Key Words
Diversity, interfaith, Sikhism, Sikh turban, kirpan, Gurdwaras, culture challenges, and religious freedom.

Contact
Issam Ghazzawi, Ph.D., College of Business and Public Management, University of La Verne, La Verne, California, 91750, 909-448-4412 (voice), ighazzawi@laverne.edu (email).
CYPRUS AIRWAYS: Was Poor Management Visible Via Financial Statements?

Olga Kandinskaia, Cyprus International Institute of Management (CIIM)

SYNOPSIS
CYPRUS AIRWAYS was the national carrier of Cyprus. Predominantly state-owned, the airline became known for being poorly managed. It came to its sad demise in January 2015, after the European Commission ruled that a state aid package of €65 million provided by the Cyprus government to the distressed national airline in 2012-2013 had been in breach of EU rules. The case study describes the company’s situation as of 2011, the year of the last annual report. The report, including financial statements, was published in 2012, and the new restructuring plan as well as the above mentioned state aid package were based on the information revealed in those statements. When looking at the CYPRUS AIRWAYS case study, we seek to establish what kind of information was revealed via the formal financial statements, and to what degree the signs of poor management were visible in the financial statements of CYPRUS AIRWAYS.

LEARNING OBJECTIVES
The objectives of this case are to:

1. Demonstrate knowledge and comprehension of the information contained in the annual report, including the auditors’ report and the formal financial statements
2. Apply acquired knowledge and facts to compare the situation of CYPRUS AIRWAYS with the key competitors
3. Perform an analysis of the situation to examine the financial weaknesses of the airline and trace those to poor management practices
4. Synthesize the knowledge and dispute the usefulness as well as the limitations of the formal financial statements in the management practice

APPLICATION
The case study is most appropriate for courses such as accounting & finance for managers, financial statements analysis, ratio analysis at the undergraduate, graduate or executive level.

KEY WORDS
Financial statements analysis, ratio analysis, financial distress, airline industry, poor management

CONTACT
Olga Kandinskaia, Cyprus International Institute of Management (CIIM), 21 Akademias Avenue, 2151 Aglandjia, Nicosia, Cyprus. Email olga@ciim.ac.cy. Phone +357-22462246.
Controversy at mbloom: Hawaii’s First Venture Capital Fund

Prescott C. Ensign, Wilfrid Laurier University

ABSTRACT
This descriptive critical incident examines the first venture capital funding effort by mbloom, a ten million dollar early-stage technology investment partnership between the Hawaii Strategic Development Corporation (HSDC) and Rosemont Seneca Technology Partners (RSTP) a private hedge fund. On July 10, 2014 Pacific Business News (PBN) announced mbloom’s investment in two startups, Flikdate and Ozolio. There was no mention of the fact that the two general partners in mbloom were also personally tied to Flikdate and Ozolio. Allegations of conflict of interest and lack of transparency from Hawaii’s tech community started immediately. PBN followed with further information. These reports provided additional information on the conditions required by RSTP in order to provide the matching funds that the State’s HSDC required. RSTP required that mbloom give consideration to a few of their own portfolio startups. These conditions raised further questions related to the use of State money and related party transactions. On a positive note, many recognized that without the initial efforts by mbloom’s general partners to secure private funding it was unlikely that such a public/private tech investment fund would have been created. This case raises significant issues and questions that can be used in the classroom.

LEARNING OBJECTIVES
The learning objectives are for students to:
1. Understand the complexity of a public-privately funded investment entity.
2. Examine the issues of related party transactions and conflict of interest involved in the controversy.
3. Assess the importance and effectiveness of mbloom’s public announcement.
4. Identify the consequences of their initial public announcement.
5. Evaluate responses to the controversy.
6. Identify mbloom’s review/selection process; identify alternative strategies.
7. Analyze the organizational structure of mbloom; examine possible changes.
8. Determine the implications of this controversy for your own professional development.

APPLICATION
It is suitable for use in courses related to entrepreneurship, venture capital, ethics, media relations, and public/private organization either at the undergraduate or graduate level.

KEY WORDS
Venture Capital, Entrepreneurs, Early-Stage Financing, Review/Vetting Process, Conflict of Interest, Related Party Transaction, Due Diligence

CONTACT
Prescott C. Ensign, Wilfrid Laurier University, Lazaridis School of Business and Economics, Waterloo, Ontario, Canada N2L 3C5, E-mail: ensign@wlu.ca, Phone: 519.884.0710 ext.2622
The Case of the Wayward College Dean

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 resulting tragic consequences of Dr. Cecilia Chang’s extensive alleged fraud that extended over a 30-year period while serving as a college dean at St. John’s University. In a for-profit company employee embezzlement typically averaged a loss of approximately $130,000 over a 24-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. Although no one will ever know the full amount actually stolen or misused by Dr. Chang, the courts awarded approximately $2 million in restitution.

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

1. Identify the basic fraud examination concepts including the fraud triangle and elements of theft.
2. Understand fraud opportunities by identifying how abuse of power and lack of internal controls can leave an organization more susceptible to theft.
3. Explore how fraud scandals affect non-profits differently from for-profit organizations.

Optional or additional learning objectives - revisit after covering certain material

4. Develop a plan for investigating this alleged fraud.
5. Research small and non-profit organization fraud solutions

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

KEY WORDS
Non-profits, fraud, embezzlement, internal controls, abuse of power, corruption.

CONTACT
Janet C. Papiernik, Department of Accounting and Finance, Doermer School of Business, Neff Hall Room 350, Indiana University Purdue University Fort Wayne, Fort Wayne, IN 46805. Email: papiernj@ipfw.edu
Phone: 260.481.6477
Draft Kings: Ethical Questions

John Baughman, Missouri State University
George Schmelzle, Missouri State University

Abstract
The Unlawful Internet Gambling Enforcement Act of 2006 addressed the legality of fantasy sports—deeming it to be a game of skill rather than a game of chance. It is because of this ruling that millions of people around the United States are legally permitted to engage in fantasy sports betting. With Draft Kings or FanDuel, users go to their website, pay an entry fee (ranging from 25 cents to thousands of dollars), and then draft a fantasy team(s) for that particular week. The success of the entrant, and the potential payout, will be dependent on the performance of the players picked. Payouts are also dependent generated on the entry fee and number of participants in that specific league. The commercials boast of users winning thousands (sometimes millions) of dollars in a very short amount of time. FanDuel expects to pay out $2 billion in prizes this year alone. But as the fantasy spots community becomes captivated by DFS and the get-rich-quick testimonies, there are serious ethical concerns that must be addressed. These concerns include insider trading, conflict of interest scenarios, and whether entering these contests is actually gambling.
James Woods and the Twitter War

Jessica A. Magaldi, Pace University

SYNOPSIS

The critical incident stems from a months-long exchange of comments over Twitter between “Abe List,” a pseudonymous Twitter user and the actor James Woods. 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 is being tested in a business law course at the undergraduate level in Spring 2016.

KEY WORDS

Defamation, First Amendment, internet law, speech

CONTACT

Jessica A. Magaldi, Department of Legal Studies and Taxation, Pace University, One Pace Plaza, New York, NY 10038. Email: jmagaldi@pace.edu. Phone: 917-974-3074.
Telecommute: Win-Win or Win-Lose?

John D. Veal, Jr.

Overview:

This explores the use of telecommuting in the workplace. It highlights actions taken by managers in three different entities and their response to telecommuting in their organizations. All three managers are faced with the question on whether telecommuting is a viable workplace tool or another program that hampers the ability of an organization to accomplish its objectives.

This case is most appropriate for courses in management, human resources management, and organization behavior.

Learning Outcomes:

1. In completing this assignment students should be able to:

2. Determine industries that have a higher probability for success with a telecommuting program

3. Explain the factors that must be considered prior to starting a telecommuting program.

4. Describe the steps involved in the implementation of a telecommuting program.

5. Determine why telecommuting did not work for various companies
Overview
David Kirkbaum is considering how best to finance possible long-term care he might require in the future. He is 52 years old and realized long-term care might be something he should include in his overall retirement and insurance planning. David is reviewing the costs, benefits and risks of alternative ways to pay for care. He could purchase a long-term care insurance policy or invest on his own to cover potential future long-term care costs. David anticipates he will retire when he is 67 in 15 years. He thought long-term care insurance might make sense for both him and his spouse who are the same age. The decision is complicated because of the uncertainty associated with the costs of care, future insurance premiums and whether he or his spouse might ever use benefits of a policy.

Learning Objectives

Application
This incident can be used in a basic finance or personal finance class. The CI assumes the student has basic skills in finance including an understanding of time value of money calculations and concepts. The topic allows students to apply theoretical concepts related to financial decision to practice and application.

Learning Objectives
The objectives of this critical incident are:
After completing the Critical Incident, students will be able to:
1. Describe the purpose and characteristics of long-term care insurance as part of financial planning, insurance and retirement planning.
2. Identify uncertainty associated with estimating the risk of needing long term care.
3. Identify the benefits, costs and risks associated with the alternatives for financing long term care.
4. Evaluate the alternatives for financing possible long term care.
5. Analyze the alternatives and determine how each might fit into the scope of David’s retirement and insurance financial planning.

Key Words
Finance, Investments, Personal Finance

Contact
Ann M. Hackert, 921 S. 8th Stop 8020, Pocatello, Idaho 83209. Phone: 208-282-2506 and Email: hackeann@isu.edu.
SYNOPSIS
Star Wars: Commander is a player vs player (PvP) game played on Apple iOS, Google Android, and Windows operating systems. In the game, players choose to either fight for the Rebellion or the Empire and are tasked with building a base to defend and also to train troops to attack. Play may opt to play the game for free, or they can choose to spend money to purchase crystals, the in game currency, that will allow them to speed up the process of upgrading their bases or to eliminate the time spent training troops so as to attack more often. Shortly after launched issues with the playability of the game which resulted in players requesting, and receiving, refunds for the crystals they had purchased. While players who did not purchase, or those who purchased but did not request a refund, became disgruntled due to the fact that some players took their refunds and repurchased crystals to get further ahead.

LEARNING OBJECTIVES
The objectives of this case are to:

1. Understand the economics of a “freemium” game environment.

2. Explore the concept of ethics in an online mobile gaming environment.

3. Understand the differences between products and services.

4. Examine strategies that companies can use when dealing with online communities.

5. Understand issues surrounding refunds with regards to digital services.

APPLICATION
This case can be used in both undergraduate and graduate level classes as a means of initiating a discussion of ethics.

KEY WORDS
Ethics, mobile gaming, online community

CONTACT
Mike McCardle, Department of Marketing, Idaho State University, 921 South 8th Avenue, Pocatello, ID 83209. Email mccamic4@isu.edu. Phone 208-282-4219
What Can Sponsors Do to Correct Corruption in FIFA?

Nanette Clinch, San Jose State University
Marco Pagani, San Jose State University
Asbjorn Osland, San Jose State University

SYNOPSIS
Coca Cola and other sponsors chose the World Cup because it was the most popular sporting event in the world. But the FIFA brand had been tarnished by corruption allegations made by the U.S. government. The US Department of Justice indictment of several officials in FIFA, alleging various financial crimes pointing to corruption, raised many issues regarding the integrity of the World Cup and thus for sponsors. FIFA sponsors couldn't do anything about speculative concern regarding bribery by Russia or Qatar in getting FIFA to select them as venues for future games. However, should sponsors engage with human rights and labor organizations to protect foreign workers in Qatar, where there were allegedly serious problems regarding treatment of foreign workers? In sum, should sponsors insist that sponsorship depends on elimination of corruption in the World Cup games?

LEARNING OBJECTIVES
The objectives of this case are to:
Understand the purpose and mission of FIFA.
Understand the legal issues concerning the DOJ corruption allegations.
Identify consequences of financial corruption that undermine economic and social welfare of communities and individuals.
Propose and analyze options of sponsors in light of the allegations of corruption.

APPLICATION
This case is most appropriate for undergraduate and graduate courses in business law and business ethics. It could also be taught in modules dealing with social responsibility in corporate finance and marketing.

KEY WORDS
FIFA, Foreign Corrupt Practices Act, corruption, sponsorship

CONTACT
Nanette Clinch, School of Management, Lucas College and Graduate School of Business, San Jose State University, One Washington Square, San Jose, CA 95192-0070. Email Nanette.clinch@sjsu.edu. Phone 408-924-3515.
SYNOPTSIS

Despite personal value considerations as well as having legal standards detailed in workplace anti-harassment training, policies and procedures, observers are frequently confused about what to do when situations arise that potentially might be classified as “harassment”. Are they being overly-sensitive or do they have intervention and reporting responsibilities? If they choose not to intervene, might there be concurrent professional or legal liabilities involved? Given the split second nature of these judgment calls, individuals are called upon to examine definitions, standards and behaviors related to workplace harassment.

LEARNING OBJECTIVES

The objectives of this case are to:

1. Identify the multiple issues in play and analyze the antecedents to and implications thereof within the context of this incident.
2. Analyze the role espoused and enacted values play in both the emergence and the resolution of the situation presented.
3. Critically consider the logical approaches a decision-maker might take in response to the situation and identify possible outcomes resulting from each of those decisions.

APPLICATION:

This case is intended primarily for use in support of graduate coursework in human resource management, organizational behavior or organization development where the students involved have several years of previous work experience. However, the challenges presented by the incident also lend themselves to graduate level studies in leadership, diversity and inclusion, and business communications. This incident may also be useful as a part of legal training where the development of personnel policies and procedures and other human resource related issues are the emphasis of study.

KEY WORDS

Anti-harassment, communication, perceptions, power

CONTACT

Monika Hudson, Entrepreneurship, Innovation and Strategy Department, University of San Francisco, 2130 Fulton Street, Malloy 235, San Francisco, CA 94117. Email mhudson@usfca.edu Phone 415-422-4395.
SHOULD JASON ROGERS BE ON THE NEGOTIATING TEAM?

Shirley A. Wilson, PhD., Bryant University
Harsh K. Luthar, PhD., Bryant University

SYNOPSIS
This critical incident describes a situation which leads up to an important decision for the president of the faculty union at Eastern University. The union is about to enter into contract negotiations with the Eastern University Administration. As president of the union, Professor Sandra Carr is responsible for assembling the faculty team that will negotiate the Collective Bargaining Agreement for the faculty. Professor Carr is surprised when the Dean of the Business School informs her of a possible affair between a trusted team member and the vice president’s secretary. He warns Professor Carr against putting this person on the negotiating team because he might “sell out the faculty.” Professor Carr must decide whether or not to include this person on the negotiating team.

LEARNING OUTCOMES
The learning outcomes for this critical incident are to:

1. Understand the nature of collective bargaining in the U.S., and how it impacts unionized universities and colleges.
2. Examine the role of trust in the negotiation process.
3. Analyze the issues related to male/female intimate relationships in the workplace in general and Eastern University union negotiations specifically.
4. Investigate the use of gossip and rumor in business communications.
5. Identify the stakeholders in the contract negotiations and assess Professor Sandra Carr’s obligations to each.
6. Determine an appropriate course of action for Professor Sandra Carr.

APPLICATION
This critical incident is intended for use in undergraduate courses in Organizational Behavior, Organization Development, and Human Resource Management, as well as leadership, negotiations, male/female relationships in the workplace, organizational communication, and organizational culture and ethics.

KEYWORDS
Personnel/OB; Collective Bargaining; Trust; Ethics; Negotiations; Group Development

CONTACT
Shirley A. Wilson, PhD., Bryant University, Management Department, 1150 Douglas Pike, Smithfield, RI 02917. Email swilson@bryant.edu. Phone 401-232-6265
SYNOPSIS
Sylvia Wright, owner of a local Hallmark card shop, had just read a newspaper article announcing the closing of another location in a neighboring county. As the Christmas shopping season approached, Sylvia wondered if she too would join a growing list of Hallmark stores that had ceased operation in 2015. News of the closings had evoked a range of emotions from Sylvia. She was not surprised, but disappointed and saddened that the trend seemed to continue at an unabated pace. Shop owners cited many reasons for their declining sales: the downturn in the economy, increased competition from other retail formats, changes in consumers buying habits and preferences, unappealing lease agreements, and lack of support from Hallmark corporate. Her shop had operated at its current location for twenty years and the lease was up for renewal next spring. She enjoyed her work and loved her customers. Sylvia knew that she needed to make a decision about her shop in the next six months. She knew it was time to revisit her old business plan.

LEARNING OBJECTIVES
The objectives of this case are to

1. Identify the environmental factors that affect the retailer
2. Discuss the impact of channel redesign on an existing retailer
3. Complete a SWOT analysis for a small, local retailer

APPLICATION
This case is appropriate for use in undergraduate courses such as Principles of Marketing, Retailing, Marketing Channels, Digital Marketing, Marketing Strategy, Introduction to Business, and Entrepreneurship.

KEY WORDS
Marketing channels, intrabrand competition, product life cycle, retail formats

CONTACT
Joyce A. Young, Scott College of Business, Indiana State University, Terre Haute, IN 47809. Email joyce.young@indstate.edu. Phone 812-237-2035.
Groupon: Innovative Accounting Metrics for a New Business Model?

Jeffrey R. Miller, Sam Houston State University
Jeffrey W. Strawser, Sam Houston State University

SYNOPSIS
Groupon’s growth was astonishing. Within three years of its existence, the company was ready for its initial public offering (IPO). Andrew Mason, the company’s Chief Executive Officer (CEO) and founder, was confident that the IPO would be a success despite the fact that Groupon had yet to show a profit. Groupon’s business model was innovative, which perhaps called for a new way to measure success. Three primary accounting or financial metrics were used to evaluate Groupon’s financial condition. While these metrics were non-GAAP measures, Mason believed these metrics more clearly showed that Groupon was a profitable and thriving company.

LEARNING OUTCOMES
The objectives of this case are to:

1. Evaluate the helpfulness of non-GAAP disclosures in reports filed with the SEC
2. Appraise the credibility of Groupon’s accounting metrics that were used to determine the profitability of the firm
3. Analyze whether Groupon’s revenue recognition policy was appropriate

APPLICATION
This case is most appropriate for use in an upper-level or graduate-level financial accounting class, such as Intermediate Accounting I and II, Advanced Accounting, and Auditing.

KEY WORDS
Non-GAAP metrics, revenue recognition, Form S-1

CONTACT
Jeff Miller, Department of Accounting, Sam Houston State University, 1821 Avenue I, 302, Box 2056, Huntsville, TX 77341. Email: jrmiller@shsu.edu. Phone: 936-294-2490.
WTF? McDonald’s Minion Unhappy Meal
Paul E. Olsen, Saint Michael’s College
Karen Popovich, Saint Michael’s College
Tiffany A. Thompson, Saint Michael’s College

Abstract
This critical incident describes the social media response of some customers when they believed a Happy Meal’s Minion toy was saying the expletive, “What the f@#k?” In July of 2015, McDonald’s released the Minion Happy Meal toys in conjunction with the release of the movie Minions, a prequel to the two Despicable Me movies. Soon after, upset customers, including parents, uploaded thousands of videos online complaining about the supposed inappropriateness of the toy. Seemingly overnight, the videos and controversy went viral, splitting viewers into two groups of either hearing the expletive, or brushing it off as simple Minion garble. Customers who did not want children exposed to such language brought their concerns to McDonald’s attention via social media hoping the company would rectify the situation. Students are asked to decide which course of action, if any, McDonald’s should take in response to the incident.

Learning Objectives
Students should be able:
1. Describe how consumers used social media when protesting organizations and corporations.
2. Differentiate between the actions organizations and companies can employ in response to “negative” or “critical” social media that goes “viral”.
3. Evaluate different levels of public relations crisis response strategies.
4. Analyze the impact of a public relations event on stock prices.

Application
This decision-based critical incident is designed for use in undergraduate Marketing, Public Relations, Business Ethics, or Introduction to Business courses as an introductory example on public relations, crisis management, and social media reach. Students should enjoy the CI as they will be familiar with both McDonald’s and the Minions. An epilogue provided in the teaching note describes how McDonald’s addressed the controversial toy.

Key Words
Public Relations, Crisis Management, and Social Media.

Contact
Dr. Paul E. Olsen, SPHR, Department of Business Administration and Accounting, Saint Michael’s College, One Winooski Park, Colchester, Vermont, 05439. 802.654.2661 (voice). polsen@smcvt.edu (email).
Panera Bread Discrimination Case

Maryam Rehman, Elmhurst College
Amanda Anderson, Elmhurst College
William Nixon, Elmhurst College
Sharon Cantoral, Elmhurst College
Sondra Simpson, Elmhurst College

Abstract
In 2012, Guy Vines, Panera Bread employee in Pittsburg, Pennsylvania quit after he stated that racial discrimination forced him to leave. A 12 page complaint was filed by the employee. His white manager, Scott Donatelli, was also fired after defending Guy’s skills and abilities. Despite Panera Bread’s diversity policies, the company sensitivities on the front lines has alternatively communicated intolerance, isolation, and ignorance. Experiencing staggering growth within recent years, the corporation’s business perspective has seen keen development; however, it additionally takes an acute human rights outlook to make customers happy, in turn fostering a brand loyalty that proves both resolute and lifelong. Diversity inclusion is lagging in some stores: Is training ineffective? Is Panera Bread’s hiring criteria are unsuccessful in screening for employees that exude racial tolerance, acceptance, and understanding? Or is leadership an issue?

Learning Outcomes
In completing this assignment, students should be able to:
1. Investigate the impact of diversity in the workplace environment and clarify how emotional intelligence may contribute to leadership effectiveness.
2. Justify why managers should behave ethically and strive to form ethical organizational cultures.
3. Examine Maslow’s Hierarchy of Needs and determine how managers can aid their employees in fulfilling these needs in the workplace.
4. Identify the motivation lessons that managers can learn from operant conditioning theory and social learning theory.
5. Describe the premises of transformational leadership, and explain how managers can efficaciously engage in it.
6. Explain what leadership is, the circumstances in which leaders are effective and ineffective, and the sources of power that enable managers to be operationally successful.

Application
This is used as a management case and was tested in an undergraduate management course. It is appropriate for retail or restaurant management, human resources, management and organizational behavior classes.

Key Words
Panera, Motivation, Diversity, Transformational Leadership, Discrimination.

Contact
Maryam c/o Sondra Simpson, Department of Business, Lehman Hall, Office 305, Elmhurst College, 190 Prospect Ave., Elmhurst, IL 60126. Email simpsonso@elmhurst.edu. Phone 630.617.5380.
Beautiful Mountain Symphony: What Sells Tickets?

Craig Escamilla, Lamar University
Irfan Ahmed, Sam Houston State University
Vivek Natarajan, Lamar University
Kabir Sen, Lamar University

SYNOPSIS
The Board of Directors of Beautiful Mountain Symphony, a mid-sized regional orchestra in Texas with over sixty years of service to its community of approximately 100,000, must determine what sells tickets and attracts patrons as it implements a new, visionary strategic plan. Given the changing demands of orchestra concert patrons in the United States in 2014, the orchestra must determine how similar its patron base and operations are to other orchestras. With this, and recent ticket sales and marketing data, the organization must draw conclusions about what motivates patrons to attend a concert. This information can become the foundation on which to build future concert seasons’ programs in order to ensure long-term stability and organizational success across a variety of measures.

LEARNING OBJECTIVES
The objectives of this critical incident are for students to:
1. Assess the adequacy, relevance, and value of data for decision-making
2. Apply critical thinking to incomplete or inadequate data.
3. Understand the challenges of appealing to multiple customer segments.

APPLICATION
The case is appropriate for introductory management and marketing classes, and presents opportunities to evaluate assumptions, analyze data, and exercise strategic decision-making skills.

KEY WORDS
Not-for profit, marketing of performance arts, data analysis.

CONTACT
Irfan Ahmed, Sam College of Business Administration, Houston State University, Huntsville, TX 77341. E-mail: irfanahmed@shsu.edu. Phone: (936) 294-1276.
Abstract
Adam Norris made his way in the "arms race" of pharmaceutical sales. He was the sales representative for a new drug that could help patients manage a serious health problem, and help him and his colleagues become sales team of the year. All he had to do was get his drug on the St. Thomas hospital formulary. To do so, Adam needed the names of the decision-makers, a guarded secret at St. Thomas. This case discusses the dynamics of pharmaceutical sales in the early to mid-2000s. When Adam is presented with a chance to take the names without permission, what should he do?

Learning Outcomes
Assess the context of sales culture in general and pharmaceutical sales in particular.
Identify the ethical issues that arise from information. Who owns it? How can it be used?
Evaluate an ethics-based dilemma using multiple approaches and rationales.

Application
The case is most appropriate for a course on business ethics, professional selling, and sales management.

Key Words
Ethics, pharmaceutical sales, information

Contact
Scott Hayward, Department of Management, 4066 Peacock Hall, ASU Box 32089, Boone, NC 28608. Email haywardsd@appstate.edu. Phone 828.262.1950
THE COLONEL CROWTHER FOUNDATION: SUCCESSION PLANNING IN A NON PROFIT ORGANIZATION

Summary:
This descriptive critical incident is based upon a real life situation encountered by the author. As vice president and a member of the Board of Directors of the Col. Crowther Foundation the author and members of the board were shocked and deeply saddened by the unexpected death of the founder and visionary leader of the foundation. Dr. Bob Hileman the executive director and founding visionary had died of a massive heart attack. The death of the executive director left a major void in the organization’s leadership and created a crisis in succession management for the board posing a very real threat to the very survival of the foundation.

While many major organizations have adopted succession plans for key leadership positions in the firm, many small and entrepreneurial organizations struggle to adopt succession planning. Even small not-for-profit organizations struggle and often find it difficult to adopt such planning. This critical incident demonstrates the dangers and the necessity for both small for profit and not for profit organizations to have a carefully crafted succession plan in place to insure continuity of leadership when the unexpected occurs.

Learning Objectives: After reading this critical incident students should be able to:

- Evaluate the need for all types of organizations, non-profits, entrepreneurial, small and large to develop a management succession plan for future leadership and address the criteria needed to formulate such a plan.
- Analyze the types of leadership and explain the type of leadership needed by the Col. Crowther Foundation in the wake of its executive director’s sudden death.
- Understand the role that an organization’s board of directors plays in helping the organization to develop a viable succession plan.

Application:
This CI is appropriate for use in undergraduate courses such as introduction to business, fundamentals of management, organizational management, strategic management, entrepreneurship and small business management.

Key Words:
Boards of Directors, governance, succession planning, leadership, situational leadership, transformational leadership, charismatic leadership, succession management

Contact:
Dr. Robert G. Edmonds
SUNY Maritime College
6 Pennyfield Ave.
Bronx, New York 10465
TelephoneNumber: 718-409-5568
redmonds@sunymaritime.edu
LIBOR: A Scandal Waiting to Happen

Marco Pagani, San José State University
Elizabeth Grace, San José State University
Asbjorn Osland, San José State University

SYNOPSIS
Tom Hayes was sentenced to fourteen years of jail for manipulating the London Interbank Offered Rate (LIBOR). The first high-profile case of white-collar crime since the global financial crisis put a spotlight onto the most important interest rate in the world. The LIBOR was a “polled” measure indicating the average rate at which LIBOR contributor banks could obtain unsecured funding in the London interbank rate for a given period, in a given currency. It was a key reference rate for global institutions, individual investors and homeowners alike. Tom Hayes, working from the Tokyo derivatives trading desk, manipulated the yen LIBOR by convincing the rate submitters at his own firm and at other contributor banks to quote biased LIBOR rates to benefit his own trades. Regulators fined financial institutions. Was the LIBOR a flawed measure that lent itself to a conspiracy? Should it be reformed or replaced?

LEARNING OBJECTIVES
The objectives of this case are to:

1. Describe the LIBOR and how it was computed
2. Evaluate the changes made to the LIBOR
3. Evaluate the impact on the LIBOR of a mistaken bank estimate.
4. Evaluate the effect of an erroneous LIBOR estimation on stakeholders.
5. Evaluate the new compliance approach versus the former honor approach.
6. Describe the defining features of a reference interest rate.
7. Evaluate LIBOR alternatives.

APPLICATION
The case is most appropriate for undergraduate and graduate courses in markets and institutions, and international finance.

KEY WORDS
LIBOR, reference interest rate, international financial markets.

CONTACT
Marco Pagani, Department of Accounting and Finance, Lucas College and Graduate School of Business, San José State University, One Washington Square, San Jose, CA, 95192-0066. Email marco.pagani@sjsu.edu. Phone 408-924-3477.
SYNOPSIS
This critical incident describes the controversial merger (and subsequent inversion) of US based Burger King and Canadian based Tim Horton. Inversion is a strategy that seeks to maximize stockholder’s wealth by acquiring foreign subsidiaries in tax-friendly countries. Burger King proposed to relocate their fiscal addresses to Canada, hence paying a lower tax rate and increasing their stockholder’s wealth. However, this move led to significant resistance given Horton’s iconic brand image in Canada and outrage by US customers of Burger King. The consequence of this merger led to boycotts and strong negative reactions from consumers on social media.

LEARNING OUTCOMES
The objectives of this critical incident are to:

1. Analyze the circumstances under which firms decide to take part in an inversion, with all their potential consequences.
2. Evaluate whether the decisions made by the firm would maximize stockholder’s wealth.

APPLICATION
This case is appropriate for undergraduate finance and strategy courses. Faculty may also use it in courses on business ethics.

KEY WORDS
Tax inversion, mergers, corporate social responsibility, social media

CONTACT
Andy Borchers, Department of Management, Entrepreneurship and Marketing, Lipscomb University, 1 University Park Drive, Nashville, TN 37204. Email: andy.borchers@lipscomb.edu. Phone: 615-966-5779.
Abstract
Oakley products were founded on innovation, designed to be more durable and reliable than their competitors' products. Founder Jim Jannard built his business to increase performance of motocross bikers, starting with motocross bike grips and eventually branching out to protective gear such as goggles and gloves. Oakley was the first to innovate single-lense sunglasses made to function like a goggle (for field-of-view and protection) but without bulk and weight. In the 1980s, Oakley partnered with the US Military by adapting their O Frames/goggles for military use. Their top-selling product, the M Frame, introduced in 1990, has remained a military standard issue eye protection, with few minor revisions, and is listed in the US Army's latest Military Combat Eye Protection (MCEP) program. However, Revision, a military contractor competitor, developed new eye protection that was able to withstand a certain direct blast that Oakley's M Frame could not. How to respond?

Learning Outcomes
In completing this assignment, students should be able to:
Describe Oakley's product evolution and who their products are aimed towards.
Describe Oakley's competition and be able to explain why they are a threat to Oakley as a company.
Discuss the relationship between ESS and Oakley.

Application
This is used as a management case and was tested in an undergraduate management course. It is appropriate for retail and product management, management and marketing classes.

Key Words
Oakley, innovation strategy, military, product management, competitive threat, decision-making.

Contact
Josh Kou c/o Sondra Simpson, Department of Business, Lehman Hall, Office 305, Elmhurst College, 190 Prospect Ave., Elmhurst, IL 60126. Email simpsonso@elmhurst.edu. Phone 630.617.5380.
Gary and Darla Become Entrepreneurs

Tony Tocco, Rockhurst University
Craig Sasse, Rockhurst University
Turner White, Rockhurst University

Synopsis
Gary and Darla Beggs after long professional tenures in large corporations have decided to start their own business. The two experienced business professionals are looking for an opportunity to use their skills and knowledge to successfully operate their own small business and do it on their terms. Gary has executive experience in the trucking business and Darla has significant HR experience at several companies. The two, now in their mid-50’s started a measured search for going into business on their own and identified three viable acquisition targets, having determined that beginning from scratch would not fit their criteria. After eight months of research they are mulling over whether to make an offer for one of them. Given their criteria what is the best opportunity for them?

Learning Objectives
In reading and discussing this case students should be able to:

1. Identify and compare the criteria for selecting a business opportunity
2. Recognize and evaluate a business opportunity

Application
This case is most applicable in courses on small business or entrepreneurship but could also work general or introductory business classes at the undergraduate level. It can also be used in MBA or Executive MBA classes where students are considering going into business for themselves.

Key Words
Entrepreneurship

Contact
Craig Sasse, Helzberg School of Management, Rockhurst University, 1100 Rockhurst Rd. Kansas City MO 64110. Email craig.sasse@rockhurst.edu. Phone 913-706-9546
Technical Foul: Congratulating Michael Jordan without Permission

Mike Schechter, St. Cloud State University
Janell Kurtz, St. Cloud State University

SYNOPSIS
To celebrate the legendary basketball player Michael Jordan’s induction into the Basketball Hall of Fame, two grocery store chains—Dominick’s and Jewel-Osco were considering advertisements in a commemorative edition of Sports Illustrated magazine. The advertisement by Dominick’s featured Jordan’s name, his jersey number “23” and a coupon for $2.00 off a steak at Dominick’s. The advertisement by Jewel-Osco featured basketball shoes, the number “23” and a short paragraph that wittily included a phrase similar to Jewel-Osco’s tag line. Neither Jewel-Osco nor Dominick’s had Michael Jordan’s permission to use his name or number. The proposed advertisements posed legal and management dilemma for Dominick’s and Jewel-Osco. A celebrity such as Michael Jordan has publicity rights to control his image, but the First Amendment gives broad protections to the right to speak and our society values the ability to discuss, comment and share newsworthy events. Should Dominick’s and Jewel-Osco run the congratulatory advertisements?

LEARNING OBJECTIVES
The objectives of this case are to:

1. Examine the law and historical roots for the tort of appropriation
2. Appraise the First Amendment limits on the tort of appropriation
3. Develop criteria for approving marketing materials that references a well-known name or image
4. Critique steps a business can take to minimize the risks attendant to including a known image or name in marketing materials
5. Assess the impact to society on permitting and limiting advertisements that congratulate celebrities for accomplishments.

APPLICATION
The case is most appropriate for courses in the legal environment of business, business law, marketing and advertising, ethics, and business and society.

KEY WORDS
 Appropriation, publicity rights, first amendment, business law, marketing, advertising, ethics

CONTACT
Janell Kurtz, Department of Marketing, 315 Centennial Hall, St. Cloud State University, St. Cloud, MN 56301. Email jkurtz@stcloudstate.edu. Phone 320-408-4148.
**Country Crock: Healthy Recipe Leaves Bad Taste in Consumers’ Mouths?**

*Bradley Brooks, Queens University of Charlotte*
*Steven Cox, Queens University of Charlotte*
*Timothy E. Burson, Queens University of Charlotte*

**SYNOPSIS**
Country Crock spread (a butter substitute made by Unilever) had changed its recipe to meet increasing consumer pressures for healthy food products. Consumer posts on sites such as the brand’s website, Facebook page, and Twitter page, almost universally stated that the new recipe had (literally) left a bad taste in consumer mouths. Country Crock was torn between meeting increasing consumer demands for healthy food products vs. offering a positive taste for consumers. The critical incident, therefore, poses three alternatives for Country Crock: (1) Maintain the new recipe with the healthy ingredients; (2) return to the original recipe; or (3) develop some new recipe.

**LEARNING OBJECTIVES**
The learning outcomes of this critical incident are to:

1. Evaluate the risks of meeting consumer preferences for one attribute that simultaneously could move the product offering away from consumer preferences on another attribute.
2. Determine how product positioning can be determined by applying attributes to develop a perceptual map.
3. Identify the risks to brand equity from a multi-attribute product offering using Keller’s Brand Equity Model.
4. Develop a course of action to respond to a dilemma of how to meet multiple consumer preferences that can be incongruent.

**APPLICATION**
This decision critical incident is suitable for undergraduate courses in Principles of Marketing, Public Relations, Marketing Management, and/or Branding.

**KEY WORDS**
Marketing, product innovation, brand equity, consumer behavior, multi-attribute models

**CONTACT**
Steven Cox, McColl School of Business, 1900 Selwyn Ave, Charlotte, NC 28274. Email coxs@queens.edu, Phone 704-688-2702.
Abstract
This critical incident concerns a small auto dealership in Michigan considering a name change in order to attract more customers. The controversy revolves around whether switching from a long-term, but less than ideal name, “Patches Enterprises,” to a new, but more appropriate name would be worth the time, cost, and effort to implement the name change. In addition, the firm needs to assess the potential upsides to the name change and consider the reactions from their current customers.

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

1. Assess the potential value of a firm’s brand name
2. Evaluate the risks and rewards of changing a firm’s name brand
3. Predict the impact of a brand’s name change on its customers
4. Propose a plan of action for the decision maker struggling with the issue of a name change

Application
This critical incident would be appropriate to use in any marketing principles, consumer behavior, or advertising class.

Key Words
Branding, Name Change, Brand Loyalty, Brand Identity, Customer Reactions

Contact
Timothy Brotherton, Ferris State University, 119 South Street, BUS 354, Big Rapids, MI 49307, brothet@ferris.edu.  (231) 591-2471
Abstract
This critical incident describes an unethical behavior happening within the LBrands company coming from a first person perspective, a cashier lead at Bath & Body Works. Bath and Body Works had three total cashier leads over the holiday season but one of them had been stealing money from the registers. The other two cashier leads came to the consensus that the other girl had been stealing the money. The incident had been happening for some time before investigation and action was taken. In the end a thousand plus dollars was missing and there was only one person to blame. The cashier lead confessed to a manager and was not only fired on the spot, but had to pay back all the money stolen. This incident can be used as an ethical decision making and ethical dilemma model, but also has issues regarding communication and power.

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

1. Use the different ethical decision making models to evaluate a situation and decide on the appropriate course of action.
2. Interpret the six steps of decision making to evaluate the decisions of the employees and managers and the timeliness of their actions.
3. Decide how management should address the issue using the six steps of decision making. This will allow managers to be organized while making an ethical decision. Applying goal setting would also help the business prevent situations such as this case for the future.
4. Analyze the case, using the four rules of ethical decision, list them and decide which is most appropriate for the manager situation at hand.

Application
This is used as a management case and was tested in an undergraduate management course. It is appropriate for retail management, management and organizational behavior classes.

Key Words
L Brands, stealing, decision-making, ethical decisions, communication, power.

Contact
Rachel Sensmeier c/o Sondra Simpson, Department of Business, Lehman Hall, Office 305, Elmhurst College, 190 Prospect Ave., Elmhurst, IL 60126. Email simpsonso@elmhurst.edu. Phone 630.617.5380
A Case of Copyright Infringement: Snowman v. Frozen

Maria A. Moore, Illinois State University
Tracy Widergren, Illinois State University

Abstract
This critical incident describes a copyright dispute between Disney and a free-lance animator over characters and actions portrayed in the teaser trailer for the motion picture Frozen. The dispute resulted in an out-of-court settlement, but the facts of the case is instructive regarding copyright law and the elements of proof needed to resolve such a dispute.

Learning Objectives
The objectives of the critical incident are:

1. A key understanding of copyright protection
2. An ability to assess and apply the factors of infringement
3. An opportunity for critical thinking about the ethics of ownership of intellectual property
4. An opportunity to analyze the case based upon the power differentials inherent between the two disputing parties – a mega corporation and an individual

Application
This case is appropriate for use in courses of management, law, advertising, public relations or sales. Major issues in the incident are copyright law and conflict resolution. Additional issues include negotiation and proactive avoidance of similar situations. The critical incident may be of use in teaching the art of graphic design, film, or animation as well.

Key Words
Copyright, infringement, negotiation, dispute resolution

Contact
Dr. Maria A. Moore, School of Communication, Illinois State University, 430 Fell Hall, Normal, IL 61790-4480. Email mmoore2@ilstu.edu, 309-438-3298.
FoodXervices Inc.
The X-Factor In Corporate Social Responsibility

Abstract

FoodXervices Inc. is distributor of foodstuff in Singapore. This case study traces its origins as a small provisions shop set-up in 1937 by the founder Mr. Ng Lim Song, the grandfather of its current owners, Ms. Nichol Ng and her brother, Mr. Nicholas Ng. Originally called Ng Chye Mong, the company went through its ups and downs and encountered several failures and successes. In the mid 1970’s, the management of the company was entrusted to Ng Lim Song’s sons. Mr. Michael Ng and his brothers continued to manage and expanded the business in the 1980s and 1990s, but in early 2003. The business encountered several challenges. Around that time, Ms. Nichol Ng, daughter of Mr. Michael Ng joined the business fulltime and together with her brother, set-out to transform the company into FoodXervices Inc.

The case shows how companies, including family-owned businesses, need to reinvent and transform themselves in order to adapt and thrive in the changing macro-environment. It also features how even small and medium enterprises can also devote time, effort and resources to CSR and charitable causes such as the Food Bank Singapore. The key lesson for students is that business and CSR concepts can be synergized together to provide long-term business and marketing advantages for the company. The case gives students a look at the various aspects of FoodXervices Inc. businesses with special attention to the Food Bank Singapore, a charity set-up by the two siblings.

Keywords: family-owned business, charity, corporate social responsibility, branding
LOCKHEED MARTIN’S SKUNK WORK’S STEALTH PROGRAM THAT CHANGED AERIAL WARFARE TACTICS

SYNOPSIS

In the years following WWII, the Soviets used radar U.S. Lend-Lease technology to develop advanced radar-guided surface-to-air missile systems (SAMs). During the Vietnam War, the U.S. lost intolerable numbers of aircraft to Soviet defenses. There was an urgent need for an aircraft that could penetrate the Soviet SAMs. The Pentagon invited its top contractors to compete in developing a solution. The winner was Lockheed’s Skunk Work’s F-117A Nighthawk, a stealth fighter bomber. Although Lockheed had flirted with bankruptcy several times, the key to its success was its scandal-free subunit, the Skunk Works. Founded during WWII by “Kelly” Johnson, the Skunk Works specialized in highly-classified military contracts. Johnson’s successor, Ben R. Rich, was presented the Rosetta Stone for stealth technology by mathematician Denys Overholser. Building on the work of Russian radar scientist, Pyotr Ufimtsev, Overholser drafted plans for a stealthy aircraft comprised of two-dimensional triangles, which scattered enemy radar. The combat potential of the plane was first demonstrated during Operations Desert Storm, which eliminated Iraq with only two F-117 bombing raids. The F-117 strikes boasted a remarkable no-casualty rate. Ever since radar systems first came into play during WWII, air warfare planners believed that surprise attacks were obsolete, and instead thought in terms of large armadas. With the advent of stealth technology small numbers of aircraft could once again be used to conduct surgical strikes.

LEARNING OUTCOMES

Students will be able to:

1. Examine the importance of organizational structure and cutting edge innovation, in producing a vehicle to penetrate an extremely hostile missile, antiaircraft, and fighter aircraft environment.
2. Evaluate the leadership complexities and board relationships with technological experts and specialized production personnel, to cope with highly demanding Department of Defense customers, e.g. generals and civilian figures with national reputations.
3. Assess the importance of a rapid prototyping (pilot run) to identify and rectify problems in a timely manner.

APPLICATION

This critical incident could be introduced in production/operations and strategic management courses in colleges of businesses or engineering institutions, teaching experience curve theory.

KEY WORDS

Aerial tactics, operations, production, prototyping, skunk works, stealth

CONTACT

John J. Vitton, Management Department, Box 8377, College of Business and Public Administration, University of North Dakota, Grand Forks, ND 58202. Email john.vitton@business.und.edu. Phone 701-777-3229.
Abstract

This critical incident considers an English-only language controversy at City Market Onion River Co-op, a grocery store and food co-op that was located in Burlington Vermont. A City Market manager’s practice of encouraging new American employees to speak English at work was perceived by employees and their union as an “English-only” mandate. Director of Human Resources Meredith O’Neill was faced with deciding how to address the manager and his practice of encouraging English speaking at work, upset employees and their union, and what, if anything, City Market’s Personnel Handbook and/or union contract should say about speaking English at work.

Learning Objectives

Students should be able:

1. Analyze the challenges in managing a diverse workforce.
2. Propose and defend employee disciplinary action.
3. Evaluate the implications of adopting a policy regarding language at work.
4. Create a policy regarding language at work.

Application

This decision-based critical incident is appropriate for courses in human resource management, labor relations, and business law. Major issues in the critical incident are workforce diversity, English-only rules, and employee relations. Additional issues include employee discipline, unions, and public relations. An epilogue provided in the teaching note describes how Director of Human Resources Meredith O’Neill and City Market resolved the language controversy.

Key Words


Contact

Dr. Paul E. Olsen, SPHR, Department of Business Administration and Accounting, Saint Michael’s College, One Winooski Park, Colchester, Vermont, 05439. 802.654.2661 (voice). polsen@smcvt.edu (email).
A Bad Time for Everyone

George Boulware, Lipscomb University

Synopsis

Chris Baker owned his own insurance agency. After selling a policy to a reluctant husband, Mike, the policy was returned within the ten day free look period. Chris had Mike complete Form 894C to cancel the policy and have his money refunded. Mike’s wife, Susan, did not know Mike had returned the policy. Mike was accidently killed before Chris returned the policy and Form 894C to the home office. Susan begged Chris to help so Chris did not return the policy but submitted a death benefit claim form. Erin, the office manager in Chris’ office found the policy and Form 894C and realized what Chris had done. She wants to keep her job but she is an honest person. What should she do?

Learning Outcomes

In completing this assignment, students should be able to:

1. Identify the legal issue in the case
2. Discuss the duties of an agent in agency situations
3. Identify the ethical issues that confronted Chris and explain how he dealt with them
4. Identify the ethical issues that now confront Erin
5. Identify methods to eliminate such problems from occurring

Application

The case is most appropriate for undergraduate courses in business law, ethics, and insurance

Key Words

Ethics, business law, insurance, agency

Contact

George Boulware, Department of Marketing, Lipscomb University, One University Drive, Nashville, TN 37204-3951 615 966-5712
SYNOPSIS
As an accounting/economics student researched the LIBOR scandal with which Barclays was involved, the student discovered the controversy surrounding Barclays’ sustainability audit report. The critical incident gives a brief overview of sustainability reporting, audits and assurance services. The specific questions include: Are CPAs well suited to conduct sustainability audits? What are the objectives and procedures of a financial statement audit and those of a sustainability audit? Is the audit report for a sustainability audit similar to the unmodified audit report of a financial statement audit?

LEARNING OBJECTIVES
The objectives of this critical incident are to:

1. Debate the pros and cons of sustainability audits.
2. Analyze the responsibilities of the CPA in providing sustainability audits.

APPLICATION
The critical incident is most appropriate for courses in auditing and social responsibility.

KEY WORDS
auditing, social responsibility

CONTACT
Gabriele Lingenfelter, Luter Hall, 1 Avenue of the Arts, Newport News, VA 23606. Email gabriele@cnu.edu. Phone 757-594-7142.
Is McDonald's 'Clowning Around' with Ronald McDonald House Charities?

*Diane R. Edmondson, Middle Tennessee State University
Cheryl B. Ward, Middle Tennessee State University
Don Roy, Middle Tennessee State University*

**SYNOPSIS**
This critical incident describes a situation in which Jane, a loyal McDonald’s drive-thru customer, is frustrated after finding out how little McDonald’s actually donates to their namesake charity, Ronald McDonald House Charities (RMHC). She frequently dropped her loose change in the donation boxes at her local McDonald’s; however, this new information made her question her donations to RMHC. It also had her questioning why she should patronize a corporation that appeared to use their relationship with RMHC for their own benefit. Jane wondered how much RMHC benefitted from the relationship with McDonald’s or whether the relationship was actually more beneficial for McDonald’s than for RMHC. What were the advantages and disadvantages this relationship had for both McDonald’s and RMHC? Jane believed that many McDonald’s customers wanted a better understanding of where their donated monies went and how they were used.

**LEARNING OUTCOMES**
The learning outcomes for this critical incident are to:

1. Analyze reasons people and/or corporations become involved with charitable organizations.
2. Evaluate the pros and cons of the McDonald’s-RMHC relationship for both McDonald’s and RMHC.

**APPLICATION**
This critical incident is most appropriate for courses in marketing, branding, non-profit marketing, and social responsibility.

**KEY WORDS**
Marketing, Branding, Non-Profit Marketing, Social Responsibility

**CONTACT**
Diane R. Edmondson, Department of Marketing, Middle Tennessee State University, Box 40, Murfreesboro, TN 37132. Email diane.edmondson@mtsu.edu. Phone 615.898.5368.
Overview

As a managing partner of an accounting firm, Mitch Mainhardt evaluates and assesses new hires. He and Joy Jones are reviewing staff utilization for two accountants; Jennifer and Jason. Both are in similar stages in their career. Staff utilization is one measure used to evaluate the economic contribution of staff members to the firm. Accounting firms often scale utilization by position. Staff and senior accountants are expected to maintain a 90 percent or greater utilization rate. Managers, because of increasing management responsibilities, are expected to achieve a utilization rate between 75 and 80 percent, and partners are expected to achieve a utilization rate of 60 percent or less depending on administrative or other responsibilities. The issues in this Critical Incident apply to any organization evaluating employees and their performance. The issue is how the performance and expectations or employees align with the organization. Metrics and expectations may differ among firms and industries. The scenario in this incident provides perspective both on the accounting profession and broader topics in human resources.

Application

This incident, based on field research and disguised, can be used in accounting classes at all levels. The Critical Incident helps students understand career expectations, but it also allows them to consider a management perspective. The Critical Incident can be used in undergraduate and MaCC Accounting classes or as an activity in a professional accounting organization to help frame expectations and examine the process of professional assessment from a manager’s perspective.

Learning Objectives

The objectives of this critical incident are:
After completing the Critical Incident, students will be able to:

1. Describe the staff utilization metric and how it is calculated.
2. Describe staff performance issues that might be highlighted by a staff utilization metric.
3. Review the performance expectations for an accounting firm from the perspectives of managers and accounting staff.
4. Evaluate the performance of Jason and Jennifer.

Key Words: Staff Utilization, Careers, Accounting

Contact

Robert R. Picard, 921 S. 8th Stop 8020, Pocatello, Idaho 83209. Phone: 208-339-1781 (mobile) and Email: picarobe@isu.edu.
#GreenPoop - A Drawback or a Selling Point for Burger King's Halloween Whopper?

Timothy Brotherton, Ferris State University  
Henry W.L. Ho, Ferris State University

Abstract

This critical incident describes a crisis facing Burger King (BK) upon the 2015 release of their Halloween Whopper at the end of September, 2015. The Halloween Whopper was a regular Whopper, but had a black bun with an A-1 flavoring and a special wrapper. BK Japan had had some success with an all-black version of the Whopper, so with great fanfare, BK introduced the new product. However, within short order there were reports that one of the side effects of eating the specially designed black bun was green poop the next day. Reactions on Twitter exploded with an 89% negative reaction. People were even posting pictures of their green poop. What were BK executives to do?

Learning Outcomes

In completing this assignment, students should be able to:

1. Analyze the customer reactions to a new product from a public relations standpoint.
2. Evaluate the alternatives to deal with a troubled new product introduction (sales promotion) from a crisis management perspective.
3. Propose a plan of action for the decision-maker.

Application

This CI would be appropriate for any marketing, advertising, or public relations class dealing with either new product introductions or crisis management issues.

Key Words

Crisis Management, Burger King, Halloween Whopper, #greenpoop

Contact

Timothy Brotherton, Ferris State University, 119 South Street, BUS 354, Big Rapids, MI 49307, brothet@ferris.edu. (231) 591-2471
Moving the Trane

Mika Kusar, Fort Lewis College
Rick Gore, Fort Lewis College

SYNOPOSIS
This critical incident describes a business scenario involving the development of an incentive pay system. At the time of situation, Richard Redmond, owner of Southwest Trane, had decided to develop a financial incentive pay program that he hoped would improve the organization’s financial performance and reward those employees responsible for the organization’s success. The organization consisted of three primary lines of business and two geographic locations. As Redmond was developing the program he was considering two key questions. Should he develop a single, company-wide incentive program linked to overall company performance or should he develop multiple incentive programs tailored to individual units and locations and tied to individual unit performance? Also, should the incentive program’s financial rewards be distributed equally among employees or should the financial rewards be distributed proportional to salary?

LEARNING OBJECTIVES
The objectives of this case are to:

1. Identify the primary motives for introducing an incentive pay plan in a firm.
2. Deconstruct a manager’s general organizational objectives to infer managerial objectives for organizational climate.
3. Evaluate key incentive pay plan design and implementation factors.
4. Apply Equity Theory to an organizational scenario to assess key success factors for the design and implementation of an incentive program.
5. Evaluate the advantages and disadvantages of alternative incentive pay plan structures.
6. Recommend an incentive plan pay payout structure within the context of a specific firm.

APPLICATION
This case is appropriate for undergraduate courses in principles of management, organizational behavior, and human resource management.

KEY WORDS
Motivation, incentive structure, goal setting

CONTACT
Mika Kusar, School of Business, 1000 Rim Drive, Durango, CO 81301. Email Kusar_m@fortlewis.edu. Phone (970)247-7277.
“10 Things I Hate About . . .” Contract Breaches

Jessica A. Magaldi, Pace University

SYNOPSIS

The critical incident stems from a contract dispute between actor Evan Rachel Wood and the production company 10 Things I Hate, LLC. The production company sued Ms. Wood for contract breach for her failure to complete her obligations to star in the film 10 Things I Hate About Life because she worked only 11 days instead of the seven weeks that she was contractually obligated to perform. Ms. Woods contends that the producers had inadequately financed the film and that production stopped because of financing issues and that she was not obligated to perform under the contract. The critical incident ends with the commencement of the lawsuit brought by the producers against Ms. Wood. It asks students to analyze the situation from the perspective of both parties and decide what defenses Ms. Woods has as well as what independent claims of her own she might bring against the producers.

LEARNING OUTCOMES

Students should be able to:

1. Interpret key provisions of a contract in light of the underlying principles of contract law, especially as such principles relate to contract breach, in the context of a dispute between parties to a contract.

2. Assess whether legal remedies are available to a victim of a contract breach and, if so, evaluate the likelihood of a particular remedy being successful.

3. Assess what legal defenses are available when a party is accused of a contact breach, including defenses as to the enforceability of a contract or that the party may be excused from performance.

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, contract law, arts and entertainment management and ethics. It was tested in a business law course at the undergraduate level.

KEY WORDS

contract breach, contract formation, contract remedies, damages, fraud, excuse of performance

CONTACT

Jessica A. Magaldi, Department of Legal Studies and Taxation, Pace University, One Pace Plaza, New York, NY 10028. Email: jmagaldi@pace.edu. Phone: 917-974-3074.
Abstract
The Republic of Tea is an eco-friendly, fair trade, organic company with high social responsibility. They aim for consumer approval and satisfaction, hoping the consumer will slow their life down to sip their tea for maximum enjoyment. When the Keurig came out, consumers were thrilled that they can make a beverage in a one cup size, instantly. At Republic of Tea, this one-use cup is seen as wasteful. The challenge is whether they should enter the market with a Republic of Tea single-serving cup and maintain their brand image. How could they maintain their environmental standards and ideals? The company would need to find a low cost, yet efficient way to produce the cups without being as wasteful. The case asks students to make a decision regarding actions they could take to maintain brand image and environmental standards while meeting customer demand.

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

1. Analyze the situation to see what can be done and/or what should be done.
2. Understand how the core beliefs of a firm are represented in their mission and vision.
3. Decide and determine possible outcome effects that will result from the decision.
4. Recognize how the decision can affect not only the company but also the competitors, environment, etc.

Application
This is used as a management case and was tested in an undergraduate management course. It is appropriate for brand, retail and product management, management and marketing classes.

Key Words
Republic of Tea, innovation strategy, retail management, product management, competitive threat, brand management.

Contact
Joe Provenza c/o Sondra Simpson, Department of Business, Lehman Hall, Office 305, Elmhurst College, 190 Prospect Ave., Elmhurst, IL 60126. Email simpsonso@elmhurst.edu. Phone 630.617.5380.
My Job or My Values

Case Summary

Samantha Gardner, Idaho State University
Neil Tocher, Idaho State University
Alexander R. Bolinger, Idaho State University

Abstract
This decision-based critical incident describes Stacey Garrison’s personal dilemma of whether to candidly express her concerns about the human resource practices of Lexi and Mark (owners of the bakery where Garrison works) or to instead keep quiet to assure that she remained in the “in-group” at the bakery. The decision point arose when Garrison and two of her fellow bakers were invited to lunch with the bakery owners and asked whether Alex, another baker who had not been invited to lunch, should be fired. Garrison was shocked that ownership would openly discuss possibly terminating one baker with the other three bakers and felt compelled to tell the owner her true feelings. However, Garrison enjoyed benefits as an informal member of the managers’ in-group and she feared that expressing her true feelings would jeopardize those benefits and put her at risk for retribution.

Learning Outcomes
The outcomes of this case are:
1. Evaluate the advantages and disadvantages of relying on informal human resource management practices.
2. Describe the concept of informal in-groups in relations between employees and their managers and explain how employee in-group/out-group status may influence managerial decisions.
3. Analyze managerial actions that create and sustain organization culture.
4. Generate a defensible rationale for what they would do if they were in Garrison’s position and why.

Application
This incident is appropriate for upper-level undergraduate and graduate courses in human resource management and organizational behavior. Key issues within the case are HRM practices in small firms, Leader member exchange, cultural issues, and values. Student discussion should encourage creative thinking regarding approaches that garrison can use to resolve the dilemma, outline considerations that Garison should consider when deciding how to respond, and analyze the cultural influence that owner HRM practices such as the lunch meeting have on employee morale and the firm’s culture.

Key Words
In Group/Out Group, Employee Referrals, Culture, Trust, Morale,

Contact
Neil Tocher, College of Business, Idaho State University, Pocatello, Idaho 83209-8020, 208-282-3588 (voice), 208-282-4367 (fax), tochneil@isu.edu (email).
SYNOPSIS

Alicia and Sam worked for Midwest Products. More than once, Alicia experienced Sam putting his arm around her when talking to her. She felt uncomfortable and all she could think about was that arm. What was he saying? She stopped paying attention to their conversation. They weren’t close friends. He didn’t appear to be anything but friendly, but Alicia found it very intrusive.

Upon finding out that he did this to his secretary, Monica, Alicia realized he might be doing this to all women employees. She decided that she needed to do something about this. What should she do? Is this sexual harassment? Should she talk to Sam about his actions? How?

LEARNING OBJECTIVES

The objectives of this incident are to:

1. Identify and appraise the issues involved in workplace sexual harassment.
2. Explain the purpose of and types of feedback.
3. Prepare a script for giving feedback.

APPLICATION

This incident, a decision case, is appropriate for use in undergraduate and graduate courses in management and human resources.

KEY WORDS

Performance Management, Human Resource Management, Sexual Harassment, Feedback

CONTACT INFORMATION

Claire McCarty, College of Business & Economics, University of Wisconsin–River Falls, 410 S. Third Street; River Falls, WI 54022, 715.425.3335, claire.mccarty@uwrf.edu
Abstract
BP, a multinational oil and gas company headquartered in London, England, was one of the six oil and gas "supermajors." On April 20th, 2010, aboard BP's oil rig, the Deep Horizon, exploded. High-pressure methane gas from the well expanded into the drill and rose into the drilling rig, where it ignited and exploded, engulfing the platform. Eleven lives were lost during the explosion and 17 people were injured. Once the explosion occurred, and the rig sank below the surface of the Gulf, it began spewing oil into the ocean. After leaking for 87 days, the oil rig spilled 4.9 million barrels of oil. In context of two main aftermath issues with the oil spill - the cleaning up the oil from the ocean and cleaning up their image - this case explores BP organizational culture, information and communication before and after the spill.

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

1. Recognize the consequences and severity of disregarding simple tasks to prevent disaster as such that is portrayed in this situation.
2. Review the possible implications that the situation has on the world in general, and also the obligations of British Petroleum for fixing the situation.
3. Understand the effect the oil spill has on British Petroleum’s organizational culture
4. Realize British Petroleum’s emotional intelligence
5. Understand the attitude towards British Petroleum after the oil spill

Application
This case explores the BP oil spill from the context of information, communication and organizational culture. It is used for a management case and was tested in an undergraduate management course.

Key Words
British Petroleum, BP oil spill, organizational culture, ethical decision-making, information and communication

Contact
Trent Howard c/o Sondra Simpson, Department of Business, Lehman Hall, Office 305, Elmhurst College, 190 Prospect Ave., Elmhurst, IL 60126. Email simpsonso@elmhurst.edu. Phone 630.617.5380.
TrintMe: Perseverance a Friend or Enemy?

*Sarika Pruthi, San Jose State University*

**SYNOPSIS**
The idea for TrintMe was born at an alumni meet in Mountain View, California, when one of VS Joshi’s former classmates wondered why he had never asked her out whilst at College. VS realized that two individuals who had the same feelings for each other had not been able to express themselves because of the fear of rejection, and developed a Facebook (FB) application to resolve the problem. Just as the marketing campaign for TrintMe was gathering momentum, VS discovered that FB had decided to deprecate its APIs (Application Programming Interfaces). TrintMe would no longer be able to access information from FB about their users, which threatened its very existence. VS had until 1 May 2015 to make a decision, and the question that was racing in his mind was whether he should persevere until then and figure out a survival strategy or pull the plug right away?

**LEARNING OBJECTIVES**
The objectives of this case are to:

1. Debate whether entrepreneurs are born or made
2. Identify alternative techniques for opportunity recognition
3. Evaluate the role of founder’s prior experience and social networks in venture creation
4. Identify the role of different types of social networks in venture creation, especially for immigrant entrepreneurs
5. Evaluate the steps founders can take at a critical juncture in the life of their ventures

**APPLICATION**
The case is most appropriate for courses in entrepreneurship and new venture creation, international and immigrant entrepreneurship, and strategy.

**KEY WORDS**
migrant, entrepreneur, opportunity, Facebook, Silicon Valley

**CONTACT**
Sarika Pruthi, School of Global Innovation & Leadership, Lucas College & Graduate School of Business, San Jose State University, CA 95192, USA. Email Sarika.pruthi@sjsu.edu. Phone 408-924-6540.
Global Blood Therapeutics, Inc.: The Future is Now

George Whaley, San Jose State University
Akshay Gupta, San Jose State University
Siddhesh Raorane, San Jose State University

Abstract
Global Blood Therapeutics, Inc. (GBT) is a small biotechnology firm seeking the best funding source to sustain the company. Initial clinical trial data for their lead drug candidate to treat sickle cell disease were encouraging, but GBT had accumulated sizable losses to get the drug to this stage. The CEO expects larger future losses because significant risk exists and additional investment is required to develop their lead drug for FDA approval and commercialization. Venture capitalists (VCs) that invested in GBT sit on the board of directors and they are anxious to receive a return on their investment. The stock market has been favorable for biotechnology companies that pursue initial public offerings (IPO) to raise funds. Thus, the critical incident (CI) ends with the CEO wondering whether going IPO is a better funding choice than seeking additional VC funds, finding angel investors or seeking a strategic partnership to satisfy its stakeholders.

Learning Outcomes
The outcomes of this case are:

1. Identify the differences between external and internal analysis and determine which funding approach would assist startup organizations to meet stakeholder needs.
2. Evaluate the needs of stakeholders in startup firms prior to FDA product approval.
3. Analyze decision criteria for feasible funding approaches that allow startup biotechnology firms to sustain themselves prior to the commercialization phase.

Application
This critical incident is most appropriate for graduate and advanced undergraduate courses in strategy, decision-making and entrepreneurship as well as graduate management classes in biotechnology, related life science fields, and workshops for life science industry professionals.

Key Words
Strategic management, entrepreneurship, product marketing and biotechnology management.

Contact
George L. Whaley, School of Management., One Washington Square, Lucas College and Graduate School of Business, San Jose State University, San Jose, CA 95192-0070, Email: george.whaley@sjtu.edu. Phone: 408- 924-3564.
Abstract
The Delta Epsilon chapter of Alpha Beta Gamma at Brighton University was under fire for not only hazing allegations, but for trying to cover up the story in the college newspaper. The hazing allegation was privately announced to the chapter by ABG headquarters. After a week of interviews and analysis, ABG headquarters called off further investigation and the “hazing” allegation was dropped. However, the university’s paper, The Brighton Chronicle, printed an article with private email correspondence and information about the hazing allegations that were just dropped. In an act of desperation, the sorority president requested members throw away the newspapers so the misleading, skewed story would not get out. There were severe consequences for throwing away the newspapers; the entire chapter’s executive board was removed from their positions. This case examines how the two occurrences involving Alpha Beta Gamma sorority were avoidable through ethical leadership, motivation, and decision making.

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

1. To examine the traits strongly associated with leadership, and behaviors that leaders engage in.
2. To define what a whistleblower is and what are the best approaches to whistleblowing.
3. To analyze what the Operant Conditioning Theory is and how it works by this case example.
4. To examine ethical dilemmas, rules for ethical decision making, and the effects of ethical and unethical behavior.
5. Explaining how the roles of organizational learning and creativity play in helping leaders and other members to improve their decisions. As well as explaining the advantages and disadvantages of group decision.

Application
This is an organizational behavior and management case and was tested in an undergraduate management course. It may also be used for example cases for Greek life and councils on leadership, hazing, and whistleblowing. It is designed to accompany readings about leadership, ethics, motivation, and decision making.

Key Words
Hazing, whistleblowing, ethical leadership, decision making, motivation.

Contact
Natalie Monte c/o Sondra Simpson, Department of Business, Lehman Hall, Office 305, Elmhurst College, 190 Prospect Ave., Elmhurst, IL 60126. Email simpsonso@elmhurst.edu. Phone 630.617.5380.
SYNOPSIS
Patrick Doyle, CEO of Dominos Pizza and David Gibbs, CEO of Pizza Hut, faced a quandary in the spring of 2015. Dominos had developed a series of TV ads called “Pizza School” that took a direct shot at Pizza Hut, even using a barely disguised Pizza Hut store as a backdrop (Buss, 2015). The ads challenged Pizza Hut employees to learn how to make a good pizza the Dominos way. Previous lawsuits in the food industry caused both executives to wonder if this series of ads might create an expensive “food fight” in court or if these ads were simply typical advertising banter. Litigation concerning the slogan “Better Ingredients, Better Pizza” had failed. Should Pizza Hut sue? How far could Dominos go in advertising? How can the executives avoid expensive and public relations damaging lawsuits?

LEARNING OBJECTIVES
The objectives of this case are to:

1. Evaluate major policy choices that leaders have in dealing with advertising claims by their firm and their competitors.
2. Recommend strategies for firms responding to competitor claims of superior food.
3. Determine what are the implications of silence in the face of competitor claims?
4. Identify how silence might or might not be effective for firms in the restaurant industry.

APPLICATION
The case is most appropriate for courses in business law, advertising, marketing, strategic management, entrepreneurship, ethics, and the social responsibility of business.

KEY WORDS
Advertising, law, marketing, strategic management, ethics

CONTACT
Brad Reid, Department of Marketing and Management, One University Park Drive, Lipscomb University, Nashville, TN 37215. Email brad.reid@lipscomb.edu. Phone 615-966-5601.
**Woman in the Eye of the Storm**

*Monika Hudson, University of San Francisco*

**SYNOPSIS**

Although they say lightning does not strike twice, a female African American attorney is mentally reviewing her final days with a previous employer to determine what implications it might have for her current workplace situation. Is she correct in feeling as though she will always have to demonstrate super-competence, given her gender and ethnicity? Self-as-source stereotype threat as well as other-as-source stereotype threat underpin an examination of issues related to performance evaluation, promotion and retention in the legal profession.

**LEARNING OBJECTIVES**

The objectives of this case are to:

1. Identify and analyze the implications of the multiple issues in play within the context of this incident.
2. Compare and contrast the espoused versus enacted values of the individual involved in this incident.
3. Identify possible antecedents and consequences of the concerns, perceptions, and behaviors portrayed.
4. Analyze the role of communication in both the emergence and the resolution of the situation presented.
5. Critically consider the logical approaches a decision-maker might take in response to the situation and identify possible outcomes resulting from the decisions made.

**APPLICATION**

This case is most appropriate for graduate students of organizational behavior or organization development, leadership, management, diversity and inclusion, or business communication, where the individuals involved have previous workplace experience.

**KEY WORDS**

Diversity and inclusion, performance evaluation, promotion and retention

**CONTACT**

Monika Hudson, University of San Francisco, School of Management, Department of Entrepreneurship, Innovation and Strategy, 2130 Fulton Street, Malloy 235, San Francisco, CA 94117. Email: m hudson@usfca.edu. Phone: 415-422-4395.
Embryo Abstracts
The Ad Blocker Dilemma
An entrepreneur struggles with the ethics of highly popular ad-blocking software

Tracy R. Blasdel, Rockhurst University
Kelly A. Phipps, Rockhurst University
Jeremy J. O'Connor, Rockhurst University

SYNOPSIS
This case places students in the role of an entrepreneur who has just launched a successful software application that blocks online advertising and blocks companies from tracking consumers’ online behavior. Despite the initial success after the launch of the application, the creator has doubts as to whether he should have ever released the app at all.

LEARNING OBJECTIVES
The objectives of this case are to:

1. Evaluate the competing interests facing a small business owner.
2. Examine how CSR considerations differ in small businesses vs. publicly traded corporations.
3. Examine how a business decision might simultaneously affect interested parties in different ways

APPLICATION
This case is most appropriate for undergraduate marketing, management, and corporate social responsibility courses.

KEY WORDS
digital marketing, social responsibility, entrepreneurship

CONTACT
Tracy R. Blasdel, Helzberg School of Management, Conway Hall, Rockhurst University, 1100 Rockhurst Road, Kansas City, MO 64110. Email tracy.blasdel@rockhurst.edu. Phone 816-501-4155.
Rachel Dolezal: The Role of Race in the Workplace
Charles P. Wilson, Rhode Island College Campus Police
Shirley A. Wilson, Bryant University

SYNOPSIS
This descriptive critical incident describes issues surrounding the claim of a White female to be a Black female. Students are asked to discuss the concepts of racial identity, race, ethnic characterizations, transracial identification, and the role of racial identity in social and professional settings.

LEARNING OUTCOMES
The learning outcomes of this critical incident are for students to:
1. Analyze and discuss the role of race in the workplace
2. Analyze the role of ethics in Rachel Dolezal’s behavior

APPLICATION
This incident can be used to illustrate a number of Organizational Behavior/Human Resource Management issues such as organization culture, race relations, cultural diversity and awareness, sociology, and ethics.

This decision critical incident may be applied to classes in Organizational Behavior and Human Resource Management, as well as classes dealing with ethics, diversity, cultural studies and general management.

KEY WORDS
Personnel/OB; Policy/Strategy; Diversity; Cultural Studies; African American Studies

CONTACT
Charles P. Wilson, BA, Rhode Island College Campus Police, 600 Mt Pleasant Ave., Providence, RI 02908. Email Cpwilson22@verizon.net. Phone (401) 465-9152
Food Cost: Exploring the Cost of Goods Sold Model at Northstar Café

Lindsay Meermans, Wittenberg University
Greg Heine, Wittenberg University
Rachel Wilson, Wittenberg University

SYNOPSIS
In the restaurant sector, the food cost category is one of the highest controllable expenses on a company’s Profit & Loss (P&L) statement. As a result, having accurate food cost data is paramount to successfully operating a restaurant. The backdrop for this case is Northstar Café, a restaurant in downtown Columbus, Ohio. Founded in 2004, Northstar Café is committed to pure and natural dining, featuring an imaginative menu of New American cuisine with a healthful emphasis on organic ingredients. The case emphasizes the use of basic accounting skills in detecting issues with elements of inventory and food cost, as well as applying the cost of goods sold (COGS) model. Students often fail to view the accounting role as a value-added function within a business. The goal of this case is to show how integrating the accounting function within the day-to-day operations of the restaurant increases productivity & profits.

LEARNING OBJECTIVES
After discussing the case, students should be able to:

1. Identify key components of food cost and basic inventory management.
2. Calculate food cost using the cost of goods sold model.
3. Evaluate methods to identify and/or prevent food cost issues.
4. Discuss the implications of undetected food cost issues.
5. Discuss the impact accounting partners have on the day-to-day operational success of a restaurant.

APPLICATION
The case is most applicable to courses in financial accounting and managerial/cost accounting.

KEY WORDS
Inventory, restaurant accounting, cost of goods sold, food cost

CONTACT
Lindsay Meermans, Business, Wittenberg University, PO Box 720, Springfield, OH 45501. Email meermansl@wittenberg.edu. Phone 614-361-1031.
Controversial “Conversations”  
A museum director’s dilemma when a famous donor becomes tainted

Jennifer F. Rinella, Rockhurst University  
Katie Fischer Clune, Rockhurst University  
Tracy R. Blasdel, Rockhurst University

SYNOPSIS
This case places students in the role of Dr. Johnnetta Cole, director of the Smithsonian’s National Museum of African Art, as she determines how to respond to a situation in which a current donor who is a well-known entertainer and also the spouse of a museum trustee has been charged with sexual misconduct. Representing the museum, the director must weigh the cost of appearing to support her friend, the disgraced figure, against the value of displaying one of the world's largest private collections of African American art.

LEARNING OBJECTIVES
The objectives of this case are to:

1. Weigh the needs of multiple stakeholders when making a controversial decision.
2. Analyze ethical, legal, and/or professional standards in the context of a challenging set of circumstances.
3. Evaluate potential solutions and propose appropriate actions.
4. Develop a plan for communicating the museum’s response with its stakeholders.

APPLICATION
This case is appropriate for undergraduate marketing, public relations, nonprofit management, arts administration, organizational behavior, and leadership classes.

KEY WORDS
arts administration, philanthropy, stakeholder theory, crisis communication, nonprofit, leadership

CONTACT
Jennifer F. Rinella, Helzberg School of Management, Conway Hall, Rockhurst University, 1100 Rockhurst Road, Kansas City, MO 64110. Email Jennifer.rinella@rockhurst.edu. Phone 816-501-4299.
CAROLYN’S DILEMMA

Britt M. Shirley, The University of Tampa
Teresa M. Pergola, The University of Tampa

SYNOPSIS
Carolyn Jones was a recent Accounting graduate who was preparing to take the Uniform Certified Public Accountant (CPA) Exam. Because of the high cost of CPA exam review materials and courses, she decided to ask some of her former classmates how they were coping with the cost. She found that some of them were sharing the expense of one program among themselves or using materials that they purchased from auction sites and other sources. One of her classmates was able to get one of the best programs available for less than one quarter of the price of buying it from the source. While it was a bargain at that price, Carolyn had difficulty justifying preparing for the most important certification in her professional career by using materials that someone else had used in the past or that might be counterfeit.

LEARNING OUTCOMES
When completed, the objectives of this case will be to:

1. Examine a situation from an ethical perspective.
2. Explain the trade-offs associated with a decision.
3. Identify the stakeholders who would be affected by a decision and the impact of the decision on each of them.

APPLICATION
The case will be most appropriate for courses in ethics.

KEY WORDS
ethics; accounting

CONTACT
Britt M. Shirley, The University of Tampa, Sykes College of Business, Box O, Tampa, FL 33606. Email bshirley@ut.edu. Phone 813-257-3638.
Where Have All the Students Gone?
Addressing a Retention Challenge at a Small Liberal Arts College
Michael Levas and Dennis Debrecht, Carroll University

Abstract
As colleges and universities continue to face increasing competition and higher student acquisition costs, it has become imperative that these organizations focus on retaining students and closely monitor their retention rates. This paper reports on one college’s use of the marketing research model to address a low retention rate. A key financial component of the school’s strategy was to increase tuition but not aid, for students as they progressed from freshmen to sophomores to juniors to seniors, resulting in a higher yield per student for the college/university. However this strategy was threatened by a low retention rate. What is a college to do? In order to address the problem, the school needed to do research to learn why students would leave an institution. The project began with secondary research and then primary research that included focus groups, and culminated in an instrument that was administered to students via various collection methods. The results of this survey revealed that there are many controllable issues that schools can change to increase retention. However there are also some factors over which a school may have little control, or would require a long term strategy to address. This information could be used to help any college or university to be more efficient in using limited resources (retention over new student acquisition costs) and suggests policy changes to increase retention more effectively by addressing causes of low retention.

Research
This case study relies on secondary and primary research done by the authors and students at an academic institution.

Learning Objectives
After analyzing this case study, students should be able to:
1. Scan internal and external secondary data to identify problem areas
2. Design a the research process to address a management problem
3. Systematically identify strategies to address the problem.

Application
This case study is appropriate for use in marketing and business management courses.

Key Words
Marketing research, retention, research design, secondary research, primary research

Contact
Michael Levas, Carroll University, Business, Accounting and Economics Department
Waukesha, WI 53186, 262-524-7161, mlevas@carrollu.edu
Dennis Debrecht, Carroll University, Business, Accounting and Economics Department
Waukesha, WI 53186, 262-524-7163, ddebrech@carrollu.edu
Is It Ethical to Pursue False Advertising?
An Embryo Case

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

SYNOPSIS
Purina has manufactured food for animals for 120 years, controlling approximately one-third of the pet food market of $20 billion per year. In recent years, Purina has seen more and more customers switching to premium brands such as Iams, Eukanuba, Hill’s Science Diet, and Blue Buffalo. Blue Buffalo’s advertising and website compare Blue food to competing brands and claim Blue food has superior ingredients, “all natural ingredients” (natural is not defined), and “chelated minerals for easier absorption.” Blue Buffalo goes further to state that they don’t want to feed “our furry family members” chicken (or poultry) by-product meals, fractionated grains like brewers rice or corn gluten meal. After Hill’s Pet Nutrition, Inc. complained to the National Advertising Division, Purina filed suit in May, 2014 for false advertising, commercial disparagement, and unjust enrichment.

LEARNING OUTCOMES
After completing this case, students will be able to
1. Apply the concept of utility.
2. Apply the concept of rights.
3. Apply the concept of distributive justice.

APPLICATION
This case is most appropriate for courses in ethics, social responsibility, and business law.

KEY WORDS
False advertising, social responsibility, ethics, business law

CONTACT
Christine P. Smith, A. B. Freeman School of Business, Tulane University, #7 McAlister Drive, New Orleans LA 70118. Email csmith20@tulane.edu. Phone 504-865-5499.
Boosting the Booster Club’s Presence

JoAnn L. Atkin, Western Michigan University
Michael McCardle, Idaho State University

Abstract
Dennis Chandler, the incoming president of the WMU Hockey Booster Club -- known as the Bronco Blue Line Club -- faced a challenging situation. The BLC’s mission was to offer financial and spirit-based support to the Division-1 hockey team, which included activities such as supplying nutritional drinks for the team and organizing and hosting the end-of-season team banquet and awards ceremony. However, membership had fallen to its lowest levels in 5 years and the average age of the club member was steadily increasing past 50 years of age. The 10 leadership roles within the organization have been filled by what Dennis referred to as “old timers” -- people who had supported the team for over 20 years and are reluctant to change their ways. Yet, Dennis knew that if the club didn’t develop new marketing strategies to attract and recruit new, younger members, it will fold within two years.

Learning Outcomes
After completing the Critical Incident, students will be able to:

6. Identify the core customer value associated with a product.
7. Analyze and redesign a current product offering.
8. Identify and construct relevant target market segmentation strategies.
9. Design a marketing communication plan to reach a specific target audience.

Application
This critical incident is primarily suggested for an undergraduate Marketing Principles course; although it also could be used and/or adapted for a non-profit marketing class, a market research class, or marketing communications class depending on which discussion questions the instructor finds most relevant.

Key Words
Marketing, non-profit, product offering, segmentation, market research, integrated marketing communication

Contact
JoAnn L. Atkin, Department of Marketing, Western Michigan University, Haworth College of Business, 1903 W. Michigan Avenue, Kalamazoo, MI, USA 49008-5430. E-mail: joann.atkin@wmich.edu. Phone 269-387-6238.
Big Decisions on Big Data: The Case of Precision Farming

Xuan Pham, Rockhurst University

SYNOPSIS
James Smith, a corn grower, was approached by a sales representative from John Deere with product offerings ranging from telematics services to a mobile application giving farmers a 360-degree view of their farms. James also received an offer for Monsanto’s FieldScripts, which were executable computer programs that carried out variable planting speed prescriptions. James then learned that the proliferation of sensors being attached to farm machines was giving rise to the “Internet of Things” (IoT) and “Big Data” trends in agriculture. Precision farming was now a reality. Greater farming efficiency came with a cost, however. Companies like John Deere and Monsanto were now collecting, aggregating, and analyzing farm information for their own benefits. John Deere and Monsanto could resell the aggregated data to third companies or use insights derived from the data to inform their business decisions. James needed to address the data ownership question before investing in precision farming products.

LEARNING OBJECTIVES
The objectives of this case are to:

1. Understand the significance of Big Data and the Internet of Things (IoT) trends in a business context.
2. Compare and contrast the benefits and costs of operating a business in a Big Data environment.
3. Evaluate alternative courses of actions as a business owner in a Big Data environment.

APPLICATION
The case is most appropriate for courses in management, business analytics, business intelligence, innovation, and leadership.

KEY WORDS
Big Data, Internet of Things, business, management, business operations, business intelligence, business analytics.

CONTACT
Xuan Pham, Helzberg School of Management, Rockhurst University, 1100 Rockhurst Road, Kansas City, MO 64110. Email: xuan.pham@rockhurst.edu. Phone: 816-501-4044.
Bouncing Back: A Case of Crisis Communication and Image Restoration

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

SYNOPSIS

Ogilvy & Mather (O&M) is one of the world’s largest marketing companies. In May 2014, O&M India designed a print campaign for the Indian brand Kurl-On mattresses. The campaign “Bounce Back” featured inspirational figures overcoming adversity. One of the ads showed a cartoon depiction of Pakistani student activist Malala Yousafzai who tumbles in the air after being shot in the head, lands on a Kurl-On mattress, and bounces back to accept the Nobel Peace Prize. The ad attracted widespread contempt for using a recent and horrendous tragedy to sell a product. O&M later apologized to Yousafzai and her family, expressing regret for issuing the print ad and promised to investigate their compromised standards and to take corrective action. Was the ad a mistake? How should a company respond? What are the elements of image restoration? Are there different ethical standards for using a real human being in advertising?

LEARNING OBJECTIVES

The objectives of this case are to:

1. Develop a key understanding of the elements of crisis communication
2. Be able to apply the factors of image restoration
3. Use critical thinking to assess the ethics of using the suffering of real human beings in advertising
4. Identify the methods citizens can use to express contempt towards mistaken business strategies leading to strategic change

APPLICATION

This case is appropriate for use in courses on advertising, public relations, corporate communication, business ethics, or strategic planning. This case could present an interesting and compelling opportunity to teach about image restoration and crisis communication. It might be particularly interesting as it is an international case and could spark discussion about cultural differences as well.

KEY WORDS

advertising, international, public relations, crisis communication, image restoration, ethics

CONTACT

Maria A. Moore, School of Communication, 430 Fell Hall, Illinois State University, Normal, IL 61790-4480. Email mmoore2@ilstu.edu. Phone 309-438-3298.
The Childfree Lifestyle: Implications for Marketers

John E. Crawford, Lipscomb University

Abstract
Tolbert Yerby is a consultant for people in business and for government officials. He works hard to keep up with the societal trends impacting decision makers and to advise them about ways to adjust business and governmental activities and policies in light of these trends. A trend impacting some decision makers is the decision by many to live a childless, or childfree lifestyle. As birth rates have fallen in many countries of the world, businesses that have traditionally had significant amounts of business related to childbirth and child rearing are experiencing a diminishing of that business. On the other hand, the money that would have been spent on children is now available to be spent on other goods and services. Thus, the loss in business by one set of firms is a gain in business by others. In addition, government policy makers are seeking to understand these trends and what they mean for sustained economic growth, having a sufficient number of workers to satisfy the demand for labor, to maintain the income of government through the paying of taxes to enable governments at various levels to meet the obligations of government to the citizenry, and to best determine what immigration policies will help countries to offset the population shortages the childfree trend is creating.

Learning Outcomes
In completing this assignment, students will:

1. Develop an understanding of how changes in the business/marketing environment impact business strategy, in particular, the social and cultural environment of business.
2. Identify which businesses will suffer revenue losses from the change and which may benefit from it.
3. Develop appropriate business strategies for the identified businesses.
4. Explore and come to understand how marketing approaches may be used by non-business entities, such as government, in an attempt to bring about a desired end result.
5. How to find relevant existing information to better understand trends.

Application
This case is suitable for use in a Principles of Marketing course or in a strategy course, such as Marketing Management, to assist in teaching students about the environmental factors impacting the behavior of consumers and to demonstrate to them the necessity for environmental monitoring and changes in marketing strategy. It also serves to show the broader application of marketing principles to entities beyond profit oriented businesses.

Key Words
Marketing environment, marketing strategy, social and cultural environment

Contact
John E. Crawford, Department of Management, Entrepreneurship, and Marketing, College of Business, Lipscomb University, One University Park Drive, Nashville, TN 37204. Email john.crawford@lipscomb.edu. Phone 615-966-5731
ENGINEERING INNOVATIONS: LEAN STRATEGY IS NOT ALWAYS THE ANSWER

Alex Polacco – St. Cloud State University
Kingshuk Mukherjee – College of St. Benedict | St. John’s University

Abstract
Engineering Innovations, a typical small U.S. manufacturing company in its industry, struggled against the twin tsunamis of cheap overseas competition and the downturn in the world economy a decade ago. This “critical incident” case discusses the strategic initiatives the company took that have resulted in unusual profits, growth, and actual exports to Far-East customers. The study illustrates how innovations in strategy supersede conventional operational and supply chain practices in the current global competitive marketplace. This study could be leveraged for use in an operations and supply-chain management course, business strategies course, or an international business course.

Learning Objectives
The learning objectives for this case are:

1. To determine and identify the strategies that have allowed Engineering Innovations to export to overseas low-cost markets, and to grow financially.
2. To discuss the operational and supply chain implications of the strategies.
3. To demonstrate strategic thinking by analyzing main internal and external factors driving decision making.
4. To explore continuous improvement strategies that will ensure sustained growth

Application
This incident could be used in an operations and supply chain management course, business strategies course, or an international business/finance course. The course offers learning opportunities for students to develop a holistic view on how decision making at one end of the supply chain could change demand and customer base entirely. Students would be analyzing the supply chain, production, investment, communication, and customer demand.

Key Words
Operations and Supply Chain Management, Strategy, Innovations, International Business

Contacts
Kingshuk Mukherjee, 37 South College Avenue St. Joseph, Minnesota 56374 USA, (320)363-5419, kmukherjee@csbsju.edu
Alex Polacco, 720 4th Ave South, St Cloud, MN 56301 USA, (320) 308-3935, apolacco@stcloudstate.edu
Benefits Plan Implementation: An Ethical Dilemma

David Pumphrey, Colorado Mesa University
Donald A. Carpenter, Colorado Mesa University

SYNOPSIS
Jim Davis, a recent college graduate and new employee at XY Logistics, had been chosen to lead the implementation of a new benefits administration software package. The project involved changing the benefits offered by the company and giving employees choices over his/her health plan coverage. A benefits consulting firm advised that the proposed change was illegal. During a demonstration of the software functionality, the CEO directed Jim to ignore the advice of the benefits consulting firm and to have his team add functionality to the system that was illegal, according to the firm hired for its benefits expertise. After the meeting, Jim’s boss also told Jim that even though the CEO’s directive was illegal, Jim must do what he was told. Jim knew that refusing to implement the CEO’s change would put his short career at XY Logistics in jeopardy.

LEARNING OBJECTIVES
The objectives of this case are to:

1. Illustrate possible career-threatening ethical choices students may encounter
2. Identify options and solutions when faced with such an ethical dilemma
3. Evaluate responsibility of an employee to obey a CEO’s directive when that directive is illegal
4. Identify tactics an employee might use to protect himself from liability of such action

APPLICATION
The case is most appropriate for courses in business ethics, human resource management, information systems, and management.

KEY WORDS
ethics, employee benefits, software systems integration

CONTACT
David Pumphrey, Computer Information Systems, Department of Business, Colorado Mesa University, 1100 North Ave, Grand Junction, CO 81501. Email dpumphrey@coloradomesa.edu. Phone 970-248-1425.
Should there be Concern with Midwestern Community Credit Union’s Office Operating Expense Ratio?

Robert Tokle - Idaho State University
Neil Tocher – Idaho State University

Critical Incident Overview

John, a long-time board member at Midwestern credit union, noted in one of his reviews of the credit union financials that Midwestern’s operating expense ratio was substantially higher than other credit unions of the same size. Careful examination revealed that Midwestern had recently taken some key steps to bring this expense ratio down, while other causes of the higher expense ratio were structural involving fixed costs that could not quickly be changed even if Midwestern had chosen to do so. For example, Midwestern had 2 more branches and 7 more ATMs than average for similar sized credit unions. While operating these branches and ATMs added to the expense ratio, they also gave members better service and in part were a result of expansion opportunities. John thought to himself, should there be any concern with Midwestern’s office operating expense ratio?

Applications

This incident is appropriate for use in money and banking and various management courses, including depository institution management.

Learning Objectives

Upon completion of this critical incident, the student should be able to:

1. Explain interest rate risk for depository institutions such as a credit union.
2. Critically evaluate the revenue and cost conditions of a credit union.
3. Understand the concepts of variable, fixed and marginal costs and apply them to a depository institution such as a credit union.

Contact

Neil Tocher, College of Business, Idaho State University, Pocatello, Idaho 83209-8020, 208-282-3588 (voice), 208-282-4367 (fax), tochneil@isu.edu (email).
Panel Summaries

Having finished our fifth year as editors, Tim Brotherton and Tim Redmer provide a list of common errors among authors and reviewers and share some suggestions on how to improve the quality of the submissions to the Journal of Critical Incidents.

In addition, we would like to announce the new website developed for the Journal of Critical Incidents, as well as, new policy statements for JCI to be incorporated in the website. These new editorial policies will be consistent with Cabell’s new standards.

- Timothy Brotherton, Ferris State University
- Timothy Redmer, Regent University
- Students from Ferris State University involved with the website design
Panel Discussion: Compliance and Ethics Teaching for Business Students

Panel members
Asbjorn Osland, San Jose State University
Eric Nelson, University of Central Missouri
Denis Oas, University of Central Missouri
Karen M. Foust, Tulane University

SYNOPSIS
Business people encounter legal difficulties due to legal violations such as the Foreign Corrupt Practices Act (FCPA), money laundering, and racketeering associated with the preceding crimes. Students need basic ethical frameworks to guide their decision making and it's also important to teach compliance. In terms of the former, ethics is often included as a module or chapter within textbooks and business schools commonly require a course in ethics, sometimes offered in the philosophy department. For the latter, we should look to industry and the work of compliance and ethics officers. Students need to learn the important laws and regulations that constitute a foundation in compliance. The FCPA is just one but as indicated above, many U.S. laws have an extraterritorial reach. Students need to know that violating these laws and regulations can subject them to criminal prosecution.

CONTACT
Asbjorn Osland, School of Global Innovation & Leadership, Box 1064, San Jose State University, San Jose, CA 95192-0164. Email asbjorn.osland@sjsu.edu. Phone 408-924-3574.
Panel Discussion: Case Research, Case Writing, and the Use of Cases in the Classroom

Editors of the Journal of Case Studies, Drs. Leigh W. Cellucci and Cara Peters, will discuss effective points that they have identified as editors that exemplify effective case research methodologies and case writing techniques from published cases in the Journal of Case Studies (2011-2015).

In addition, they will pilot a survey regarding how MBAA participants are using cases in their classroom and spearhead a discussion regarding the use of cases in the classroom.

- Leigh W. Cellucci, East Carolina University
- Cara Peters, Winthrop University
Panel Discussion: Case Writer’s Workshop

Panel members

Andy Borchers, Lipscomb University
Leigh W. Cellucci, East Carolina University,
Kay Hodge, University of Nebraska at Kearney

"New to case writing? Want to learn how to better write cases? Please come to our Case Writer’s Workshop on Friday from 9:30-12:15. Experienced case writers and journal editors will help you understand the case writing and publishing process. Further, participants will learn about the Society for Case Research and its three publications. In-class exercises will get you started in identifying and writing your own cases."
Roundtable Discussion: Transforming Case Assignments into Program Assessments in about 90 Seconds.

Make the most of your case studies by transforming them into assessment-worthy assignments. Learn the trick that takes your rubric-graded assignment to quantified assessment in about 90-seconds. Discuss well-tested techniques for isolating objectives, crafting rubrics, and exploiting useful administrative features of common teaching tools such as Excel and Turnitin.

Real examples and lessons learned will be shared based on long experience in course- and program-level assessment from undergraduate general education to graduate business programs. Detailed teaching notes for peer-review and student case writing will be featured.

- Elizabeth Jones, Notre Dame of Maryland University
**Chairs**

Ann Hackert, Idaho State University  
Cara Peters, Winthrop University  
Craig Davis, Ohio University  
Craig Sasse, Rockhurst University  
Diane R. Edmondson, Middle Tennessee State University  
Elizabeth Jones, Notre Dame of Maryland University  
Eric Nelson, University of Central Missouri  
George Boulware, Lipscomb University  
George Whaley, San José State University  
Jessica Magaldi, Pace University  
Joanne tokle, Idaho State University  
John D. Veal, Jr. Webster University  
Maria A. Moore, Illinois State University  
Michael McCardle, Idaho State University  
Neil Tocher, Idaho State University  
Paul Olsen, Saint Michael’s College  
Robert Picard, Idaho State University  
Scott Hayward, Appalachian State University  
Sondra Simpson, Elmhurst College  
Timothy Brotherton, Ferris State University  
Timothy Redmer, Regent University  
Tracy R. Blasdel, Rockhurst University
Scribes

Asbjorn Osland, San José State University
Bob Edmonds, SUNY Maritime College
Charles Wilson, Rhode Island College
Denise Oas, University of Central Missouri
Elizabeth Jones, Notre Dame of Maryland University
Eric Nelson, University of Central Missouri
George Whaley, San José State University
Irfan Ahmed, Sam Houston State University
Janell Kurtz, St. Cloud State University
Jeffrey R. Miller, Sam Houston State University
JoAnn L. Atkin, Western Michigan University
John D. Veal Jr, Webster University
Karen Foust, Tulane University
Kay Hodge, University of Nebraska at Kearney
Leigh W. Cellucci, East Carolina University,
Patrick Schultz, University of North Dakota
Prescott C. Ensign, Wilfrid Laurier University
Steven Cox, Queens University of Charlotte
Timothy Brotherton, Ferris State University
Timothy Redmer, Regent University
Discussants

Andrew Borchers, Lipscomb University
Asbjorn Osland, San José State University
Bob Edmonds, SUNY Maritime College
Britt M. Shirley, The University of Tampa
Cara Peters, Winthrop University
Charles P. Wilson, Rhode Island College
Cheryl Ward, Middle Tennessee State University
Claire L. McCarty, University of Wisconsin-River Falls
Craig Davis, Ohio University
Deborah Pembleton, College of St. Benedict / St. John's University
Dennis Debrecht, Carroll University
Elizabeth Jones, Notre Dame of Maryland University
Eric Nelson, University of Central Missouri
Gabriele Lingenfelter, Christopher Newport University
George Boulware, Lipscomb University
George Schmelzle, Missouri State University
George Whaley, San José State University
Irfan Ahmed, Sam Houston State University
Issam Ghazzawi, University of La Verne
Jeffrey R. Miller, Sam Houston State University
Jessica Magaldi, Pace University
JoAnn L. Atkin, Western Michigan University
Joanne Tokle, Idaho State University (CIIM)
John J. Vitton, University of North Dakota
Joyce A. Young, Indiana State University
Karen Foust, Tulane University
Kay Hodge, University of Nebraska at Kearney
Lindsay Meermans, Wittenberg University
Michael McCardle, Idaho State University
Mika Kusar, Fort Lewis College
Monika Hudson, University of San Francisco
Nanette Clinch, San Jose State University
Neil Tocher, Idaho State University
Olga Kandinskaia, Cyprus International Institute of Management (CIIM)
Prescott C. Ensign, Wilfrid Laurier University
Robert Picard, Idaho State University
Sarika Pruthi, San Jose State University
Shirley Wilson, Bryant University
Sondra Simpson, Elmhurst College
Tracy R. Blasdel, Rockhurst University
Xuan Pham, Rockhurst University
Authors

Abby Brooks, Christopher Newport University
Akshay Gupta, San Jose State University
Alec Datoli, Elmhurst College
Alex Polacco – St. Cloud State University
Alexander R. Bolinger, Idaho State University
Amanda Anderson, Elmhurst College
Amanda Muransky, Elmhurst College
Andrew Borchers, Lipscomb University
Ann M. Hackert, Idaho State University
Asbjorn Osland, San Jose State University
Bob Edmonds, SUNY Maritime College
Brad Reid, Lipscomb University
Bradley Brooks, Queens University of Charlotte
Britt M. Shirley, The University of Tampa
Charles P. Wilson, Rhode Island College
Cheryl B. Ward, Middle Tennessee State University
Christine P. Smith, Tulane University
Claire L. McCarty, University of Wisconsin-River Falls
Craig Escamilla, Lamar University
Craig L. Davis, Ohio University
Craig Sasse, Rockhurst University
D.J. Dial, Elmhurst College
Dan Muisenga, Elmhurst College
David Pumphrey, Colorado Mesa University
Dawn E. Chandler, Queens University of Charlotte
Deborah Pembleton, College of St. Benedict / St. John's University
Dennis Debrecht, Carroll University
Diane R. Edmondson, Middle Tennessee State University
Don Roy, Middle Tennessee State University
Donald Carpenter, Colorado Mesa University
Donna A. Smith, Ferris State University
Eleni Eliopoulos, Elmhurst College
Elizabeth DeRosier, University of Wisconsin-River Falls
Elizabeth Grace, San José State University
Evan Leski, Elmhurst College
Gabriele Lingenfelter, Christopher Newport University
George Boulware, Lipscomb University
George Schmelzle, Missouri State University
George Whaley, San Jose State University
Greg Heine, Wittenberg University
Harsh K. Luthar, Bryant University
Irfan Ahmed, Sam Houston State University
Issam Ghazzawi, University of La Verne
Janell Kurtz, St. Cloud State University
Janet C. Papiernik, Indiana University Purdue University Fort Wayne
Jeff Brookman, Idaho State University
Jeffrey R. Miller, Sam Houston State University
Jeffrey W. Strawser, Sam Houston State University
Jennifer F. Rinella, Rockhurst University
Jeremy J. O’Connor, Rockhurst University
Jessica A. Magaldi, Pace University
Jie McCardle, Idaho State University
JoAnn L. Atkin, Western Michigan University
John Baughman, Missouri State University
John D. Veal, Jr., Webster University
John E. Crawford, Lipscomb University
John J. Vitton, University of North Dakota
Joseph Lomma, Elmhurst College
Joseph Provenza, Elmhurst College
Joshua Kou, Elmhurst College
Joyce A. Young, Indiana State University
Julio Rivas-Aguilar, Lipscomb University
Kabir Sen, Lamar University
Karen Crooker, University of Wisconsin – Parkside
Karen M. Foust, Tulane University
Karen Popovich, Saint Michael’s College
Kathy S. Pollock, Indiana University Purdue University Fort Wayne
Katie Fischer Clune, Rockhurst University
Kayla Pickens, Elmhurst College
Keith Hunter, University of San Francisco
Kelly A. Phipps, Rockhurst University
Kelsey McNeela, Elmhurst College
Kingshuk Mukherjee – College of St. Benedict | St. John’s University
Lindsay Meermans, Wittenberg University
Marco Pagani, San Jose State University
Maria A. Moore, Illinois State University
Maryam Rehman, Elmhurst College
Maureen Barry, Elmhurst College
Michael H. Hogg, Tulane University
Michael Levas, Carroll University
Michael McCardle, Idaho State University
Michael T. Manion, University of Wisconsin – Parkside
Mika Kusar, Fort Lewis College
Mike Schechter, St. Cloud State University
Mitch Morris, Elmhurst College
Monika Hudson, University of San Francisco
Nanette Clinch, San Jose State University
Natalie Monte, Elmhurst College
Neil Tocher, Idaho State University
Nikolaus T. Butz, University of North Dakota
Olga Kandinskaia, Cyprus International Institute of Management (CIIM)
Panagiota Melonas, Elmhurst College
Pasquale Maranto, Elmhurst College
Patrick L. Schultz, University of North Dakota
Paul E. Olsen, Saint Michael's College
Paul W. Clark, Coastal Carolina University
Peter Knight, University of Wisconsin – Parkside
Peter T. Kelly, Saint Michael's College
Prescott C. Ensign, Wilfrid Laurier University
Rachel Sensmeier, Elmhurst College
Rachel Wilson, Wittenberg University
Rick Gore, Fort Lewis College
Robert R. Picard, Idaho State University
Robert Tokle, Idaho State University
Robin Byerly, Appalachian State University
Samantha Gardner, Idaho State University
Sarah Lemm, Elmhurst College
Sarika Pruthi, San Jose State University
Scott Hayward, Appalachian State University
Sharon Cantoral, Elmhurst College
Shirley A. Wilson, Bryant University
Siddhesh Raorane, San Jose State University
Sondra Simpson, Elmhurst College
Stephanie Hintz, Elmhurst College
Steven Cox, Queens University of Charlotte
Tahil Sharma, University of La Verne
Teresa M. Pergola, The University of Tampa
Tiffany A. Thompson, Saint Michael's College
Timothy Brotherton, Ferris State University
Timothy E. Burson, Queens University of Charlotte
Tom Zimny, Elmhurst College
Tony Tocco, Rockhurst University
Tracy R. Blasdel, Rockhurst University
Tracy Widergren, Illinois State University
Trent Howard, Elmhurst College
Turner White, Rockhurst University
Veronica Arora, Illinois State University
Vivek Natarajan, Lamar University
William Nixon, Elmhurst College
Xuan Pham, Rockhurst University
Zachary A. Lloyd, Ohio University
Panelists

Andrew Borchers, Lipscomb University
Asbjorn Osland, San Jose State University
Cara Peters, Winthrop University,
Denise Oas, University of Central Missouri
Elizabeth Jones, Notre Dame of Maryland University
Eric Nelson, University of Central Missouri
Karen M. Foust, Tulane University
Kay Hodge, University of Nebraska at Kearney
Leigh W. Cellucci, East Carolina University,
Timothy Brotherton, Ferris State University
Timothy Redmer, Regent University
38th Annual Summer Case Writer's Workshop University Of Nebraska at Kearney

Kearney, NE    July 14-16, 2016

2016 Call for Cases

Information and registration: Kay Hodge hodgek@unk.edu

Who should attend?

Case Writers at all stages – prospective authors who want to learn what case writing is all about; new authors that desire feedback, help, and encouragement; and experienced authors who want their cases professionally reviewed.

What’s the scoop?

Learn About Case Writing. The Annual Summer Case Writer’s Workshop helps prospective authors, new authors, and experienced authors of case writing learn how to prepare cases for classroom use and publication. Concurrent groups meet over 1.5 days to discuss each case submitted. As a case author, you will receive feedback from a group of fellow case writers to help improve your case and teaching note. In each group, the author is present; a chair facilitates the feedback process; a scribe takes notes (so the author can listen to the comments and engage with the reviewers). Participants in each group have read the case before the workshop and come prepared to offer constructive feedback and suggestions on how a case and accompanying teaching note might be improved.

You do not have to submit a case to attend. Individuals interested in exploring case writing as an alternative to traditional research are encouraged to attend. Note, we will also offer a preconference workshop on Thursday for those that are new to case writing. In addition, all conference attendees will get the opportunity to review up to five cases as part of their conference attendance.

Publish Your Case. Abstracts of all cases accepted for presentation will be published in the Conference Proceedings. Cases presented at the workshop are eligible for submission to the Journal of Case Studies, Business Case Journal and Journal of Critical Incidents, blind refereed publications sponsored by the Society for Case Research.

Have a Good Time. Workshop participants are a friendly, enthusiastic group who get together to help each other with case writing and case teaching.


Types of cases? Cases are encouraged in ALL BUSINESS DISCIPLINES. Participants will review cases from within and outside their discipline, a particular strength of the SCR workshop. This leads to cases with broader perspectives. SCR journals accept both decision and descriptive
Send your submissions to Dr. Kay Hodge at University of Nebraska at Kearney, hodgek@unk.edu by May 31, 2016.

When? July 14-16, 2016. The conference will then begin with a welcome dinner that same day and sessions will run from to 1 pm on Saturday, July 16th.

Other Questions? Please contact Dr. Kay Hodge (hodgek@unk.edu) or (308-865-8003).

Looking forward to seeing you in Kearney!

Casewriter Q&A

Q: What's the difference between a decision and descriptive case?

A: The choices are a decision case or a descriptive case. In a decision case the student is placed in the manager’s (decision-makers) position and asked to make recommendations appropriate to the context of the situation. Authors of decision cases conduct field research and interviews that may be supplemented with secondary sources. Information must reflect a real situation with no fictionalized parts. Authors can disguise cases if their research subjects request. Decision cases require a signed release from the organization studied for publication. Descriptive cases are also accepted. A descriptive case is a description of a real situation based on secondary sources. Author(s) must present sufficient background information such that the student can evaluate how effectively the actors managed situations.

Q: What's a “hook” and why is it so important?

A: Like any good story, a well-written case or critical incident needs a hook, that “ah-ha” decisive moment that compels students to keep reading and draws them in. Field research coupled with your knowledge of the discipline your case covers will help you create an interesting review of a situation based on research and interviews (decision case) or secondary sources (descriptive case). But you aren’t done until you get your hook to start the case or incident. This is the place to communicate the drama and significance of your work. Think about the hook as you interview in the field and aim for a quote or comment that draws in students and potential adopters.