**PROGRAM AND PROCEEDINGS**

**WESTERN CASEWRITERS ASSOCIATION**

**CONFERENCE**

The Sheraton Salt Lake City Hotel



Salt Lake City, Utah, USA

March 8, 2018

Edited by Deborah Walker

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# WCA 2018 SPONSORS

The Western Casewriters Association expresses its gratitude to these generous sponsors:



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# PRESIDENT’S WELCOME

Welcome everyone!

We are looking forward to meeting and discussing business case writing with you at the 2018 Western Casewriters Association (WCA) conference in Salt Lake City.

The WCA was founded with the mission to help train, develop, and support case writers. To help us achieve our goals, we have structured the day with a roundtable format.  We have found that this is the best way to provide practical, detailed feedback on your case and instructor’s manual. Our hope is that many of you become motived and inspired to continue your work and aim to publish your work in peer-reviewed journals.  Please consider submitting your polished cases to the *Journal of Case Research and Inquiry*(JCRI), the peer-reviewed online publication of the WCA.  The JCRI is now listed in *Cabell’s Directory of Publishing Opportunities*.

The WCA strongly believes in creating a supportive environment that encourages people to start, develop and write interesting business cases. We believe in a mentoring culture where the more experienced members share their insights and ideas with new case writers to continue the development of our field.

Andrew Fergus will start our morning session with a welcome and introduction. This will be followed by a short roundtable etiquette presentation by Deborah Walker, 2018 Program Chair. We will then break into our roundtable discussion groups.

This year the keynote presentation is a joint session with the Western Academy of Management conference and is being presented by Andrew Fergus and Jeffrey Shay (Co-President of NACRA). This year’s keynote is a workshop entitled “Writing a Business Case – how hard can it be?” or *these are the many mistakes I have made so you don’t have to*.

We will conclude the conference with reflections on the day, as well a presentation of the awards for best WCA case, and best WCA mentored case.  The WCA Board Meeting, chaired by Andrew Fergus, will take place following the presentation of the awards.

We hope you find the conference fun, motivating and rewarding.

Andrew Fergus, Ph.D.

President, Western Casewriters Association

# WCA 2018 PROGRAM SCHEDULE

|  |  |  |
| --- | --- | --- |
| **Time** | **Location** | **Agenda** |
| 7:00 am – 5:00 pm | Canyon’s Lobby | WAM and WCA Registration |
| 7:00 to 8:00 am | Bryce Ballroom | WCA Breakfast |
| 8:10 to 8:30 am | Snowbird | Welcome (Andrew Fergus, President of WCA)  Roundtable Etiquette & Feedback Process (Deborah Walker, WCA Program Chair) |
| 8:30 to 9:25 am | Snowbird | Roundtable Discussions of Cases (1) |
| 9:25 to 9:40 am | Snowbird | Quick Bathroom/Stretch Break |
| 9:40 to 10:30 am | Snowbird | Roundtable Discussions of Cases (2) |
| 10:30 to 10:45 am | Sundance | Refreshment Break with WAM |
| 10:45 am to 12:00 pm | Snowbird | Roundtable Discussions of Cases (3) and wrap-up of case discussions (return to earlier unfinished discussions if needed). |
| 12:00 to 1:00 pm | Bryce Ballroom | WCA/WAM Lunch |
| 1:00 to 2:15 pm | Snowbird | Business Case Writing Workshop: Andrew Fergus (President of WCA) and Jeffrey Shay (Co-President of NACRA). |
| 2:15 to 2:30 pm | Sundance | Refreshment Break with WAM |
| 2:30 to 3:15 pm | Snowbird | Award Presentations   * Best WCA Case and Best Mentored Case   Survey Feedback  Reviewer Invitation (WCA and JCRI)  Treasurer's Report  Choose WCA Program Chair for 2020 Conference |
| 3:15 to 4:00 | Snowbird | WCA Board Meeting:  *-Journal of Case Research and Inquiry*  -Other New Business |

# WCA 2018 TABLE ASSIGNMENTS

## Tables 1-2

\*Names bolded are presenters or participants, others are co-authors not presenting or participating.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table** | **Lead** | **Authors** | **Case** |
| 1 | **Lorraine Taylor** | **Wayne Singular**  Anthony Bell  Thompson Rivers Univ. | Mostly Mental Shuttles |
|
| **John J. Lawrence** **Michael McCollough**  University of Idaho | Pleasant Ridge Habitat for Humanity Second Chance Home Supply |
| **Lorraine Taylor Michael Valdez**  (faculty mentors)  **Keith Winchester**  (student)  Fort Lewis College | Let’s Do This Honey, Go Get Us A Hotel!: The Case of the Adventure Inn |
| 2 | **Issam Ghazzawi** | **Issam A. Ghazzawi**  University of La Verne | Pepsico: Can the Company Thrive Without the Pepsi Soda and Create a New “Aha”? |
|
| **Kathryn Aten**  **Anita Salem**  Daniel Whitt  Naval Postgraduate School | Greening Marines? Creating an Energy Ethos in the US Marine Corps |
| **Anne Dietterich**  Ali Choucri  Victoria Gillern  (students)  **Julia Ivy**  (faculty mentor)  Northeastern Univ. | Expansion Decision: HC Securities and Investment |

## Tables 3-4

\*Names bolded are presenters or participants, others are co-authors not presenting or participating.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table** | **Lead** | **Authors** | **Case** |
| 3 | **Steve McGuire** | **George L. Whaley**  San Jose State Univ.  **Stephen McGuire**  California State Univ. - Los Angeles | 23andMe: Future of Personal Genomics Services Business? |
| **Shreshthi Mehta** (student)  Julia Ivy  (faculty mentor)  Northeastern Univ. | Brewerkz: Brewing What Works Best |
| **Tanisha Suzuki**  Lora Litzanova (students)  Andrew Fergus  Anthony Bell  (faculty mentors)  Thompson Rivers Univ. | New Life Community: Simply Catering or Not? |
| 4 | **Nina O’Brien** | **Carol Flinchbaugh**  New Mexico State Univ.  **Ghadir Ishqaidef**  California State Univ. - Chico | A Case Study of Flexible HR Leadership |
| **Kathrine Gonzalez**  Sergio Canavati  Sonoma State Univ. | Lola’s Market: Capturing a New Generation |
| **Michael J. Merenda** University of New Hampshire, Durham | Ashokan Center: Fostering Deep Connections |
| **Jennifer Schultz**  Utah Valley Univ. | Participant |
| **Nina O’Brien**  California State Univ. - Los Angeles | Participant |
| **Mike Annett**  MacEwan Univ. | Participant |

## Table 5

\*Names bolded are presenters or participants, others are co-authors not presenting or participating.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table** | **Lead** | **Authors** | **Case** |
| 5 | **Andrew Fergus** | **Douglas Lyon**  Stephanie Owings  Fort Lewis College | Rising From the Ashes |
| **Lora Litzanova**  Tanisha Suzuki (students)  **Andrew Fergus**  Anthony Bell  (faculty mentors)  Thompson Rivers Univ. | Iron Road Brewing: Small Business With a Big Passion |
| **Evan Miller,**  **Ivie Crawford,**  **Mac Carter,**  **Josh Emerson,**  Erin Quinn,  Zach Scurrah  (students)  **Deborah Walker** (faculty mentor)  Fort Lewis College | Should Expansion Happen in a Tight Budget Situation? |

# 

# ABOUT THE WESTERN CASEWRITERS ASSOCIATION

The Western Casewriters Association (WCA) Conference is held yearly in conjunction with the Western Academy of Management (WAM). Participants can attend both conferences. The WCA Conference is a unique opportunity to engage with other case writers in a small group format to exchange feedback and polish a case, learn about using cases in the classroom, get a peer-reviewed conference and proceedings on a vita, and enjoy presentations from leading case researchers and case educators.

The WCA Conference is an excellent professional opportunity because it is a "developmental" meeting designed to provide feedback from experienced case researchers. Submissions are double-blind peer reviewed. Participants at the conference will have their cases reviewed by other authors. The objective is to help participants move their cases towards journal publication.

## HISTORY

The Western Casewriters Association was started by Dick Eisenbeis in 1989 at the Western Academy of Management. It has convened an annual case writing conference in the roundtable format since then to help train, develop, and support case researchers.

Past presidents of the organization include:

Sally Baack

Jyoti Bachani

Issam Ghazzawi

Leslie Goldgehn

Duane Helleloid

Anne Lawrence

Teresa Martinelli-Lee

Steve McGuire

Joshua Mindel

Bruce Robertson

Keith Sakuda

V. Seshan

Jeff Shay

James Spee

Teri Tompkins

Michael Valdez

George Whaley

Joan Winn

# WCA FUTURE SITES

2019 Rohnert Park, California (March 7, 2019)

2020 TBA

WAM’s Executive Committee selects the sites for the WAM and the WCA conferences with the assistance of their conference service provider, International Conference Services. When selecting sites, they discuss considerations that include budget, accessibility, the venue itself, and the attractions of the destination.



# 2017-2018 WCA OFFICERS

President: Andrew Fergus, Thompson Rivers University

President Elect & Program Chair 2017-18: Deborah Walker, Fort Lewis College

Treasurer: Teresa Martinelli, University of La Verne

# WCA 2018 REVIEWERS

|  |  |
| --- | --- |
| Tony Bell | Thompson Rivers University |
| Stephen Bowden | University of Waikato |
| Timothy Clark | Northern Arizona University |
| Andrew Fergus | Thompson Rivers University |
| Issam A. Ghazzawi | University of La Verne |
| Eric Huggins | Fort Lewis College |
| Doug Lyon | Fort Lewis College |
| Teresa Martinelli | University of La Verne |
| Tom Miaskiewicz | Fort Lewis College |
| Nina O’Brien | California State University – Las Angeles |
| Keith Sakuda | University of Hawaii |
| Kaori Takano | Fort Lewis College |
| Lorraine Taylor | Fort Lewis College |
| Michael Valdez | Fort Lewis College |
| Kristen Watson | Fort Lewis College |

# WCA 2018 AWARDS PROCESS

Two awards will be given at the WCA Conference this year. Reviewers reviewed cases as well as nominated cases to receive an award. The Conference chair then reread the cases that were nominated in order to determine the winners. This was a very difficult process, there were some very good cases submitted to the Conference this year.

The first award presented at the Conference will be the “Best Case” in the proceedings award, for which all submissions are considered. The second award presented at the Conference will be the “Best Mentored Case”, which is for the best case written by a student author or authors and a faculty mentor.

Award winners will be recognized at the close of the Conference.

# HOW TO GET THE MOST OUT OF THE CASE DISCUSSION SESSIONS

The Western Case Writers Conference (WCA) is a developmental workshop. Each person contributes to each case discussion and in turn receives feedback from each other person at their roundtable. Participants’ preparation prior to the WCA and active participation at the WCA are crucial to the usefulness of the roundtable discussions and the value added that the Conference can deliver. Conference participants typically report that they were delighted with the helpful, constructive feedback they received.

PURPOSE OF WCA CASE ROUNDTABLE DISCUSSIONS

The purpose of the WCA is to assist all case researchers to improve their cases for use in classes, for adoption by others, and for publication. Rarely is a case presented that is ready for journal publishing; yet even such a case can be improved. Case authors may feel overwhelmed by all the suggestions. The process is not negative; rather, we work with you for improvement, just as we expect that you will help others to improve their cases. Therefore, all participants must thoroughly prepare all cases and instructor’s manuals (IMs) (aka TN teaching notes). The discussion process is rigorous yet done in a supportive manner. You should expect that the first case discussed, long or short, would take more time than those that follow. Some issues will occur in several cases; discussion need not be repeated in detail after the first time the issues arise.

PREPARING FOR CASE ANALYSES & FEEDBACK

The focus should be on major, as well as subtle ways, to improve cases; not on proofreading details of grammar, spelling, etc. To give helpful feedback, you may (1) mark up the cases and instructor’s manual and give them to the author after discussion; or (2) prepare a summary of your comments and helpful suggestions prior to the Conference, and hand your written comments to the author. Important questions include:

* Is the case interesting? To students? To faculty? To potential journals?
* Does it address an important issue in the specified course(s)?
* Can teaching objectives be achieved with the case? Does the IM address these?
* Can the IM analysis be derived from the case (and other course material)?
* Are there enough data? Should more be added? Should some be deleted?
* Is the analysis tied to theory?
* Is the case presentation unbiased or is the author's opinion evident?

DUTIES OF PARTICIPANTS IN THE CASE ROUNDTABLES

**Table Leaders:** Brief the participants about what will happen. Determine the case sequence (typically the sequence that is on the Table Assignments document is followed). Be sure there is a recorder for each case. Guide the discussion. Keep the focus on important issues, not on proofreading. Discourage repetitious comments. Be sure to be a timekeeper, or assign one.

**Recorder:** Document the substance of comments. A copy of each case and IM will be emailed to each table participant. Provide your notes to the case author(s).

**Case Author(s):** Prepare some opening remarks that explain why you wrote the case, how you

have used it in class (if you have), and any issues you are having with the case.

Listen to the comments and ask questions.

**Discussant:** [Other authors and participants] Review cases thoroughly, provide feedback, and participate actively.

There may be participants in your session who are not presenting a case. They are there to observe, to learn, and to participate. Welcome them. Most participants find that these sessions are more enjoyable and collegial than any other type of academic conference they attend. We hope that you will agree. We have planned the WCA Conference to provide interesting, enjoyable, and instructive activities.

AFTER THE WCA CONFERENCE

Revise your case and IM to develop and improve as needed. Carefully consider all session comments; some changes may not be appropriate or feasible; you must decide what to change and not to change. Some suggested data might not be available. However, you are likely to see the more cogent changes you do not make in reviews of your case when you submit it to a journal. Can you defend your choices when you respond to a reviewer? Test-teach the revised case and update your IM based on that teaching experience. Ask a colleague to observe your teaching or to teach the case, if possible; he or she will find things you missed or that you know but did not include. (The author always knows details not included in the case.)

Submit your revised Case and IM to the *Journal of Case Research and Inquiry* (JCRI)*,* the *Case Research Journal* (CRJ)*,* or to another scholarly journal. Most journal submissions will require at least one revision before acceptance. Failure to revise and resubmit represents the largest reason that submissions to the *Case Research Journal* are not published*.* If one journal rejects your case, do not be vexed, as it may be an appropriate fit with *another* journal.

WCA members may have suggestions about which journal would be a good outlet for your case. Once your case is accepted by a journal, or finally rejected, it is then appropriate to submit it to book authors for adoption. Note however, that any earlier acceptance by book authors disqualifies your case for most journals. Book acceptances often carry merit, depending on your university, but rarely have as much academic credit as acceptance by a peer-reviewed journal.

“How to Get the Most out of the Case Discussion Sessions” was prepared by NACRA authors Timothy W. Edlund and Linda E. Swayne and adapted by Jeff Shay, Stephen McGuire, Duane Helleloid, and Leslie Goldgehn for WCA’s purposes. Some edits were made by Deborah Walker in 2018. WCA thanks NACRA for use of the document.

# PUBLISHING YOUR CASE

Publishing your case in a peer reviewed journal not only meets the standard of quality expected of all research, but also allows your work to be used by others. That is what you want and that is what WCA wants for you.

For a list of publication opportunities, visit “Case Publishing Outlets” through the link on our website, [www.westerncasewriters.org](http://www.westerncasewriters.org).

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CALL FOR CASES, NOTES, AND ARTICLES

The *Journal of Case Research and Inquiry*(JCRI) is the peer reviewed online publication of the Western Casewriters Association (WCA) and is listed in *Cabell’s Directory of Publishing Opportunities*. The JCRI publishes (1) TEACHING CASE STUDIES in business and public administration, nonprofit management, social entrepreneurship and economic policy; (2) NOTES - industry or theoretical analyses to accompany cases; and (3) ARTICLES on case research and teaching with cases.

JCRI publishes cases, notes, and articles online. That way they are available full-text and free of charge to educators and students. Educators are encouraged to place in their syllabi links to JCRI cases, notes, and articles.

Authors should review the JCRI submission guidelines by visiting JCRI’s web page <http://www.jcri.org/>. Authors may contact the editor, Steve McGuire or associate editor, Deborah Walker, at [editor@jcri.org](mailto:editor@jcri.org).



CALL FOR CASES

The *Case Research Journal* (CRJ) is published by the North American Case Research Association (NACRA). The CRJ is the leading academic journal for cases in business and related disciplines in North America.

The Case Research Journal publishes outstanding field-research-based, decision focused teaching cases drawn from research in real organizations, dealing with issues in all administration-related disciplines. Occasionally, the Journal publishes papers concerning case research, case writing or case teaching. All manuscripts are double-blind refereed by Editorial Board members and ad hoc reviewers in the appropriate discipline.   
  
The journal publishes four issues a year and has an acceptance rate of approximately 20 percent. Cases published in the CRJ are distributed directly to libraries and subscribers and online through NACRA’s publishing partners, including, Harvard, Ivey, The Case Centre, McGraw-Hill Create, Pearson Collections, and Study.net. Authors should review the CRJ submission guidelines by visiting NACRA’s web page <http://nacra.net/>. Authors may contact the editor, Gina Grandyat [gina.grandy@uregina.ca](mailto:gina.grandy@uregina.ca) if they have questions.

# WCA 2018 CASE SYNOPSES

Case synopses may have been edited for length and format. WCA authors retain all rights to their intellectual work product; please contact the author(s) for permission to reproduce or use a case.

## **ASHOKAN CENTER: FOSTERING DEEP CONNECTIONS**

**Michael J. Merenda**

Peter T. Paul College of Business and Economics

University of New Hampshire, Durham

**Case Synopsis**

The case chronicles the transition of the Center from a public, nonprofit, entity under the supervision of the State University of New York at New Paltz to a private, nonprofit, social enterprise, dependent on program revenues, grants and donations. The case focuses on husband and wife, social entrepreneurs Jay Ungar and Molly Mason, co-founders of the Ashokan Foundation Inc. and Ashokan Center, Inc. (ACI). Early in 2017, Ungar and Mason and the Center's Board faced several challenges. Ungar and Mason, were two well-known musicians who had recently taken on the interim management of the Center in response to the sudden departure of its Executive Director. The Center offered educational and community programming in: Natural Science including watershed studies and ecology; living history; culture; music and dance; and team building. Ashokan's 320 acre campus was located in Olivebridge, New York in the Catskill Mountains. Over 5,000 school children, mostly from New York, annually enrolled in the Center's programs. ACI 2016, revenues and net revenues were just over $1.7 million and $26,220, respectively. The Center envisioned a living and working teaching campus with a focus on sustainability and protection of the physical environment and open space.

Although the Board was firmly committed to the Center's vision they were concerned about having adequate funds and community backing to sustain its programs and campus. The current financial situation was concerning since the Center was barely operating at breakeven. ACI's Board estimated that it needed over $4,000,000 in additional funds by 2023 to maintain its building, natural resources and for strategic initiatives. The case ends with Ungar wondering whether the Board's actions were radical enough to sustain the Center's financial health and achieve its mission: "to teach, inspire and bring people together through shared experiences in nature, history and the arts."

## **PLEASANT RIDGE HABITAT FOR HUMANITY SECOND CHANCE HOME SUPPLY**

**John Lawrence & Michael McCollough**

University of Idaho

**Case Synopsis**

In the fall of 2016, the Pleasant Ridge Habitat for Humanity Second Chance Home Supply (SCHS) store added an assistant manager in order to expand the hours the store was open and increase the store’s presence on social media. The store, which sold donated building materials and some household items, was operated to generate funds for the organization’s core mission of building homes for those in need in the local area. The case is set in July of 2017. The organization’s executive director and the store’s manager and assistant manager have reviewed the store’s financial performance and discovered that both the store’s sales and contribution to the organization have declined over the past year despite being open significantly longer hours. Students are placed in the shoes of the store’s managers and must wrestle with why sales and contribution have declined and what they should do in response.

## **A CASE STUDY OF FLEXIBLE HR LEADERSHIP**

**Carol Flinchbaugh**

New Mexico State University

&

**Ghadir Ishqaidef**

California State University - Chico

**Case Synopsis**

Non-profit organizations (NPOs) increasingly look for ways to reduce operational costs without disrupting core services. Often, NPOs share resources with other non-profits in the same geographic area in the hopes of achieving cost reductions or operational efficiencies. Such shared resources include building space, joint program offerings, and even personnel in support roles (Bunger, 2013; Cefola et al., 2010). This case explored the ramifications of two social service non-profits entering into an arrangement to share one human resources executive (HRE) between the two agencies to oversee the human resource departments at both agencies. In this case, we first provide details about the organizational context, the shared arrangement, the initial thoughts about the arrangement, and details after the HRE was in the shared role for six months. We end with questions by asking about the next steps that both organizations need to make.

## **PEPSICO, CAN THE COMPANY THRIVE WITHOUT THE PEPSI SODA AND CREATE A NEW “AHA”?**

**Issam A. Ghazzawi, Ph.D.**

University of La Verne

**Case Synopsis**

As soda contributed less than 25% of its global sales in the past few years, PepsiCo was no longer a soda company. The company was witnessing a new era at it started emphasizing healthier products. With the continual growth for its snacks division and non-carbonated drinks, especially in North America and coupled with its growth in Russia, which claimed to be it’s the company’s second-largest market after the U.S.; PepsiCo has had a sound 2016 (Forbes.com, 2017).

The year 2016 marked another exceptional year for PepsiCo. Its portfolio included 22 billion-dollar brands, the company built a world-class go-to-market system, a strong retail and foodservice partnerships, and its core instant currency earnings per share (EPS) grew 9% as opposed to its goal of 6% growth (PepsiCo.com, 2017). Its organic revenue grew 3.7%, in line with a goal of approximately 4% growth. Equally important to its growth, the company has increased its investment in research and development by 45% since 2011 that is equivalent to $3.5 billion over the past five years (PepsiCo.com, 2017).

PepsiCo’s snack division “Frito-Lay” North America was the most valuable and profitable divisions, making almost 40% of the company’s valuation (Forbes.com, 2017). Following Frito-Lay North America division, the company’s North America Beverages continued to be a strong second performing division despite having a drinks portfolio weighting heavily towards the slow-growth carbonated drinks category. The company’s North America Beverages division’s success was primarily due to the steady growth of the non-carbonated drinks portfolio of PepsiCo. The carbonated beverages have been weighing down the company over the past couple of years, and that has created a major contention when activist investors have asked to spin-off the ailing beverages division.

Health concerns and obesity were becoming key challenges for this giant company. PepsiCo has created a plan to reduce sodium, fats, and sugar in its products as well as introduced more whole grain foods to its line-up. has led the company to refine some of its snack foods and begin making healthier versions. Additionally, the company was able to offer a new line of 100-calorie-per-portion products repackaged as Mini Bites and a variety of real fruit and vegetable crisps called Flat Earth (Hoovers, 2017-a).

PepsiCo was faced with a major challenge, to further accelerate and transform a winning model that profited from the sales of carbonated beverages and un-healthy snacks of the past to a new giant that could benefit from healthy beverages and other food.

The “BIG” question, will PepsiCo ever spin-off its ailing beverages division?

## **MOSTLY MENTAL SHUTTLES**

**Wayne Singular & Anthony Bell**

Thompson Rivers University

**Case Synopsis**

Mostly Mental Shuttles was a Kamloops, British Columbia based transportation company owned and operated by Dylan Methot that since 2010 had specialized in mountain bike shuttling. The core portion of his business was shuttling mountain bikers at a city-owned facility called the Kamloops Bike Ranch.

In early July 2017, one of the worst wildfire seasons in British Columbia’s history exploded and became a Province-wide State of Emergency. In Kamloops, all nature parks, including the Kamloops Bike Ranch, were closed to public use on the recommendation of the Chief of Kamloops Fire Rescue.

With his primary source of revenue shut down, Methot was forced to search for alternative uses for his equipment and provide a revenue stream for the company.

This introductory case is based on a real-world operational decision; it requires students to use income statement analysis and cash flow forecasting and to consider options both qualitatively and quantitatively to make recommendations for Methot.

## **NEW LIFE COMMUNITY: SIMPLY CATERING OR NOT?**

**Tanisha Suzuki & Lora Litzanova** (Student Authors)

**Andrew Fergus & Anthony Bell** (Faculty Supervisors)

Thompson Rivers University

**Case Synopsis**

Stan Dueck, Executive Director of New Life Community (NLC), was concerned about the financial stability of NLC, in particular the inconsistency of cash flows and the uncertainty that it created. Stan was faced with the decision of whether he should restart an old endeavor that had failed previously. ‘Simply Catering’ was a social enterprise that NLC had run for a short time a few years ago, it had provided catering for events, weddings and business meetings.  Simply Catering had been financially successful, but the success had created major staffing and burnout problems that were so significant that the program had to be shelved. He believed that if it was executed better this time around, Simply Catering could provide a significant boost to NLC’s cash flow, particularly during the slower summer months.

Initially, this case puts students in Stan’s mindset: How should he deal with the uncertain cash flows and should he reinstate the social enterprise known as Simply Catering.  It will help students understand what social entrepreneurship entails and force them to think outside of the business mentality.

## **IRON ROAD BREWING: SMALL BUSINESS WITH A BIG PASSION**

**Lora Litzanova & Tanisha Suzuki** (Student Authors)

**Andrew Fergus & Anthony Bell** (Faculty Mentors)

Thompson Rivers University

**Case Synopsis**

Iron Roads was created by two geologists who wanted to set up roots in the interior and were looking to start a new business venture as their profession was taking them away from starting families and live close to where they had grown up. They decided to open a new microbrewery in Kamloops. Soon after opening they realized they were struggling to effectively run the business. They were either not making enough product or selling out of the best sellers, which was hindering the restaurant but also resulting in inconsistent purchasing availabilities for their other buyers, like other local businesses. On the other hand they were not selling enough to keep the business profitable in order to expand. They had been open long enough to try to start expanding into local liquor stores but once again production and lack of sales experience were hindering their expansion. They needed to decide whether to hire a salesperson to increase demand for their product or hire a new brew master to help increase production.

## **BREWERKZ: BREWING WHAT WORKS BEST**

**Shreshthi Mehta** (Student Author)

**Julia Ivy** (Faculty Mentor)

Northeastern University

**Case Synopsis**

The major decision in the case concerns Devin’s, the owner of a successfully operating microbrewery in Singapore, dilemma of how to navigate a local saturated market and expand business operations to promising markets of China or India. The owner considered a host of options from Hong Kong, Kaula Lampur to Mumbai, and he was aware that microbrewery set up required a large area, which limited his options. In order to answer the questions of, “What should Devin do to assure market-based solution for his company?”, students first evaluate external and internal forces that the company faced by evaluating each of the markets and then formulate market-based strategy for market entry.

The case demonstrates that being low and mid-income countries, China and India offered different opportunities and threats for the craft beer market. Students would learn macro and microeconomic differences and develop different market-based decisions for shaping Brewerkz’s competitive and global strategies, as well as its choice of market entry mode.

## **GREENING MARINES? CREATING AN ENERGY ETHOS IN THE US MARINE CORPS**

**Kathryn Aten** & **Anita Salem**

Naval Postgraduate School

&

**Daniel Whitt**

U.S. Marine Corps

**Case Synopsis**

In 2009, Marine Corps Commandant General James T. Conway directed that deployed Marines’ reduce their fuel usage by one-half, by 2025. The Marines energy use had been increasing and this was taking a toll. Over the previous decade, the Marine Corps had adopted new technologies to combat terrorism and insurgencies. Between 2001 and 2010, a United States Marine Corps (USMC) battalions’ use of radios increased by 250%, IT and computers by 200%, and vehicles by 200%, with vehicle weight increasing by 75% resulting in a 30% decrease in miles per gallon. In Afghanistan, for every 50 fuel conveys one Marine was either wounded or killed. A group of subject matter experts identified gaps that would have to be filled to meet the direction and the Marines Created the Expeditionary Energy Office to “analyze, develop, and direct the Marine Corps’ energy strategy” to meet the Commandant’s directive.

The case describes the challenges faced by Marine Colonel James Caley as he begins his role as Director of the Expeditionary Energy Office. Caley took on the role in 2013 following three combat tours and his previous role as the Commanding Officer of a Combat Logistics Regiment responsible for seven battalions of Marines. Under the leadership of Caley’s predecessor, the E2O had focused on innovations to shift to renewable energy sources and had developed innovative new technologies. As Colonel Caley took over, these innovations, though promising, were not yet widely adopted. Further, internal surveys suggested at best, low awareness among Marines of a need for change, or worse, apathy and even resistance to energy efficiency efforts. How could Caley support behavior and ethos change? How should he engage external stakeholders and win their support, while maintaining internal support? How should he frame the issue for internal and external stakeholders? And above all, how could he make sure that any changes he made created a more ready and lethal Marine Corps?

## **EXPANSION DECISION: HC SECURITIES AND INVESTMENT**

**Ali Choucri**, **Anne Dietterich** & **Victoria Gillern** (Student Authors)

**Julia Ivy** (Faculty Mentor)

Northeastern University

**Case Synopsis**

The case introduces the Egyptian investment company HC Securities, which is facing limited growth and challenges related to Egypt’s recent economic slowdown. Its CEO, Mr. Choucri feels expansion outside of the Middle East and North Africa could be the key to the company’s growth and stability. Hong Kong and Singapore were identified as the most compelling locations because of their sophisticated economies, increased growth potential in the investments industry, and location within the Asia-Pacific region. In order to answer the questions of “What should Mr. Choucri do to assure a market-based solution for his company?”, students first evaluate external and internal forces that the company would face if enter each of these markets, and then formulate market-based strategy for market entry.

Students would learn macro and microeconomic differences and develop market-based decisions for shaping HC Securities’ global strategy, as well as its choice of market entry mode. The case demonstrates how instability in the local market (Egypt) forces the company to go global. It also demonstrates how a country that has a promising economic environment and similar social characteristics with Egyptian culture (Hong Kong), might be not the best choice for a company due to heavy influence from another country (China), lack of English speakers, and somewhat unstable political environment. The case also teaches students to appreciate importance of a value of a company role within the region integration (Singapore as a tech hub within the APAC region) that presents access to other parts of the region.

## **LOLA’S MARKET: CAPTURING A NEW GENERATION**

**Kathrine Gonzalez** & **Sergio Canavati**

Sonoma State University

**Case Synopsis**

Since Lola’s Market opened its doors on February 8, 1992, David Ortega and his family have worked to embed quality and tradition into the fabric of Lola’s across its’ multiple locations in the North Bay Area, California. In recent years, consumers have changed the way they shop and consumers have become more savvy and aware of marketing and advertising tactics. In order to stay ahead of its competitors, Lola’s market must adapt to the new consumer and work to engage the newest and largest consumer market—the millennial generation.

The case includes information on the history of Lola’s Market and their current plans of business improvement as well as data on the current Supermarket industry. This case also analyzes the options Lola’s has in engaging the millennial consumer through social media and outreach and technology tactics. The case will look at these engagement options and how Lola’s can succeed in these new methods whilst still keeping with the traditions and values they are rooted in.

## **LET’S DO THIS HONEY, GO GET US A HOTEL!: THE CASE OF THE ADVENTURE INN**

**Keith D. Winchester** (Student Author)

&

**Lorraine L. Taylor** & **Michael E. Valdez** (Faculty Mentors)

Fort Lewis College

**Case Synopsis**

Nigel and Tammy Peck owned the Adventure Inn in Durango, CO. The process of acquiring the 25 room motel took several years and their combined life savings. Then after only 18 months of owning the property, Nigel’s trusted friend and hotel broker, John Hazen, suggested that they had made such dramatic improvements through remodeling and rebranding the property that it was ready to sell. Nigel knew he would eventually sell the business but he hadn’t taken on the project with the intention to “flip” it so quickly. Nigel ruminated upon the variety of factors that would influence the future success of the Adventure Inn in order to make an informed decision about whether the timing was right to put the property up for sale. It didn’t appear to Nigel that there was a clear answer after weighing the factors that were out of his control with his own abilities to navigate future challenges associated with those factors. Essentially, Nigel was in a position to decide whether he saw himself as an entrepreneur who could leverage his assets and experience at the Adventure Inn to take on new ventures, or whether his strengths were as a manager of a property that had yet to achieve its full potential.

## **RISING FROM THE ASHES**

**Douglas Lyon** & **Stephanie Owings**

Fort Lewis College

**Case Synopsis**

The El Moro tavern was a thriving part of Durango’s restaurant scene until a fire in the fall of 2016 closed the business for several months. Business interruption and fire insurance helped the restaurant weather the financial turmoil associated with the smoke and fire damage, as well as the loss of revenue from the closure. El Moro continued to pay its employees during the closure, thus reinforcing El Moro’s close knit business culture. Management asked the employees to volunteer at a non-profit organization of their choice while they were on paid leave. That innovative commitment to Durango’s wellbeing garnered glowing press and positive feelings among the employees and in the community. El Moro reopened to great community fanfare in early 2017. El Moro won the Spirit of Durango award at the annual Durango Chamber of Commerce awards ceremony in January of 2018.

## **23ANDME: FUTURE OF PERSONAL GENOMICS SERVICES BUSINESS?**

**George Whaley**

San José State University

&

**Stephen McGuire**

California State University-LA

**Case Synopsis**

The CEO of 23andMe started the firm in 2006 to sell saliva test kits with ancestry and health related genetic reports direct to customers (DTC). Afterwards, some customers, clinicians, and government officials became concerned about the accuracy of the tests, the privacy of customer data, and the health consequences of the DTC approach. The Federal Drug Administration (FDA) believed the test kits and genetic reports fell into the medical device category and required agency approval to market them. 23andMe ignored FDA warnings about its unauthorized DTC approach and the FDA ordered 23andMe to stop the service. The CEO suspended its genetic reporting service but continued to market the test kits and ancestry reports to emphasize the mission and business model. Students are asked to assess the CEO’s reactions in early 2014 from the viewpoint of her leadership approach and the legal, ethical, and marketing impact of her previous decisions.

## **EXPANSION OF STUDENT SERVICES IN HIGHER EDUCATION**

**Mac Carter, Ivie Crawford, Josh Emerson, Evan Miller,**

**Erin Quinn**, & **Zach Scurrah**

(Student Authors)

&

**Deborah Walker** (Faculty Mentor)

Fort Lewis College

**Case Synopsis**

In 2017, Fort Lewis College (FLC) created a plan to expand its current Student Life Center (SLC). FLC was a small liberal arts college in southwestern Colorado. It was well known for its plentiful outdoor opportunities in the surrounding mountains and deserts. The SLC housed recreational facilities for students, including exercise areas, a climbing wall, and the popular Outdoor Pursuits (OP) program. OP provided students with outdoor equipment and opportunities to participate in sponsored trips. The expansion plan for the SLC focused on consolidating student health services, including the existing clinic and mental health services. It also included options to construct additional recreational facilities such as a field house and to expand the capacity of the OP program. The expansion would be financed by bonds which were to be paid by student fees. In order to proceed with the expansion plan, it needed to pass several approval processes. Most importantly it needed to be approved by the Institutional Fee Review Board (IFRB), which is required for any and all student fees.

The decision at the center of this case is whether or not to expand the SLC, and to what extent it should be expanded. One main problem the expansion sought to address was an increasing need for mental health services in the FLC student body. The expansion plan also explored options to add to existing recreational and exercise facilities in the SLC to better accommodate their current users. The decision the students need to address requires analysis of the costs and benefits of different expansion plans, of the funding and financing of the construction, and of the process of approving the expansion. Decision-makers need to understand the problem from strategic, economic, financial, student-focused, and ethical perspectives.