

Western Casewriters Association

PROCEEDINGS

of the

**WESTERN CASEWRITERS ASSOCIATION
CONFERENCE 2009**

**March 19, 2009
Midway, Utah**

Western Casewriters Association

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

The WCA Conference is an excellent professional development opportunity because it is a "developmental" meeting designed to provide feedback from experienced case researchers in order to move the projects toward eventual publication in a top-level journal such as the *Case Research Journal*. The format is round-table discussions. You will be grouped with three or four other people who have written cases and will spend time with an experienced facilitator providing feedback on each others' cases. The feedback, although rigorous, is friendly. Or, you may attend the conference just to learn more about case research and how to teach with cases.

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Welcome to the WCA Conference

Welcome to the 2009 Western Casewriters Association Conference. The Conference has been organized to provide you with specific feedback on your case and instructor's manual so that you can move forward with your study toward publication in peer reviewed journals. All submissions to the conference were double blind peer reviewed, and all case researchers arrive at the conference with some idea of areas that can be improved in their cases. Our goal at the conference is to provide authors with specific feedback and helpful suggestions.

Some WCA case researchers are highly experienced with multiple published cases, while others are new to the "art and craft" of case writing. All are welcome at the WCA Conference, which has been set up so that we learn from each other. This year, WCA accepted for the Conference a rich collection of 24 case studies in different settings, industries, and countries. Some cases deal with start-up ventures and the entrepreneurs behind them, and others with long-established organizations run by seasoned managers. One third of the cases focus on nonprofit organizations, and two thirds on profit-seeking ventures. While most studies are on U.S. organizations, some firms are transnationals and others are small, local businesses. In addition to the U.S., cases at this year's conference include organizations managed in Belarus, Botswana, Canada, China, India, Nepal, Russia, and Taiwan. The diversity of researchers, themes and topics, types of organizations, and national settings enable us all a wealth of learning.

Case studies are both publishable research papers and tools to facilitate learning in the classroom. In addition to the case discussions, this year three speakers will share their expertise with WCA participants. Joan Winn will get us started with remarks about what constitutes a great case study. Jeff Shay will facilitate a discussion of a case to demonstrate by example how we can facilitate learning in the classroom with cases. Armand Gilinsky will give us some pointers on getting our case research published.

Welcome to the Conference. We hope that you find the experience rewarding, and also hope to see you next year at the WCA Conference on March 25, 2010 in Kona, Hawaii.

Aloha!

Steve McGuire

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Western Casewriters Association Conference

March 19, 2009, Midway, Utah

WCA Reviewers

All submissions to the Western Casewriters Association Conference are blind peer reviewed. WCA thanks the following reviewers for their contributions:

Gordan Bagot, Ph.D. (California State University, Los Angeles), ffgb@verizon.net

Armand Gilinsky, Jr., Ph.D. (Sonoma State University), armand.gilinsky@sonoma.edu

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Catherine Levitt, Ph.D. (California State University, Los Angeles), CathyLevitt@msn.com

Stephen McGuire, Ph.D. (California State University, Los Angeles), steve@mcguire.net

Joan Winn, Ph.D. (University of Denver), jwinn@du.edu

WCA Awards Committee

Two awards will be given at the Conference. WCA reviewers nominated cases to the Awards Committee for selection of the best papers. The Awards Committee in 2009 included two seasoned case researchers, **George Whaley**, Ph.D. and **Anne Lawrence**, Ph.D. The two Awards are for **“BEST CASE”** in the Proceedings, for which all submissions are considered, and **“BEST MENTORED CASE”** for the best case by a student author(s) and faculty mentor.

WCA thanks the Awards Committee members for their contribution.

WCA Table Leaders

Discussions of cases the WCA Conference are organized by tables, and cases are organized based on the common themes they present.

Table 1	<i>Challenges in Governance and Leadership</i>	Joan Winn
Table 2	<i>Turning Firm Strategy Into Value</i>	V. Seshan
Table 3	<i>Achieving High Performance Through People</i>	Jyoti Bachani
Table 4	<i>Different Faces of Entrepreneurship</i>	Armand Gilinsky, Jr.
Table 5	<i>Challenges in Organizational Ethics</i>	Steve McGuire

WCA thanks the Table Leaders for their contributions.

PROGRAM

Western Casewriters Association Conference

All room locations posted at the reception desk

Wednesday, March 18, 2009 [WAM Event]	
3:30 to 6:15 p.m.	WAM Doctoral/Junior Faculty Consortium Welcome Facilitators: Bambi Douma (University of Montana) and David Hannah (Simon Fraser University)
Thursday, March 19, 2009 [WCA Conference]	
7:30 to 8:30 am	WCA Breakfast
8:30 to 9:15 am	Introductions and briefing on roundtable etiquette <i>“What Makes a Great Case Study?”</i> by Joan Winn (University of Denver)
9:15 to 10:15 am	Roundtable Discussions of Cases
10:15 to 10:30 am	Break
10:30 to 11:45 am	Roundtable Discussions of Cases
11:45 am to 12:45 pm	WCA / WAM Lunch
12:45 to 1:15 pm	Western Casewriters Association Business Meeting (All WCA Participants to attend)
1:15 to 2:15 pm	<i>“Effective Facilitation of a Case Study in the Classroom: A Demonstration Using a Short Case,”</i> Joint session WCA and WAM doctoral and junior faculty consortium by Jeff Shay (University of Montana)
2:15 to 2:30 pm	Break
2:30 to 3:45 pm	Roundtable Discussions of Cases
3:45 to 4:00 pm	Break
4:00 to 4:30 pm	<i>“Publishing Case Research,”</i> Joint session WCA and WAM doctoral and junior faculty consortium by Armand Gilinsky (Sonoma State University)
4:30 to 5:00 pm	WCA Conference Reflections (Open Discussion) Awards for “BEST CASE” and “BEST MENTORED CASE”
5:00 pm onward	Join the WAM Social Activities

PEER REVIEWED CASES
Western Casewriters Association Conference

March 19, 2009, Midway, Utah

	<u>PAGE</u>
AIR-LIMO TRANSIT: LAUNCHING AN AIR TAXI SERVICE, by Eldon H. Bernstein (Lynn University) & Colleen P. Braun (Bion Consulting Group)	29
ALLOCATING WORK FAIRLY, by Jyoti Bachani (Saint Mary's College of California)	30
ASIAN YOUTH CENTER: ADAPTING TO CULTURAL EVOLUTION, by Motaz B. Abutarboosh, Vera Danho, Wanida Jaiaree & Ezgi Kumkumaglu (California State University, Los Angeles)	31
BEE NATURE, by Robert M. Patterson (Westminster College)	32
BEIJING AURORA MUSICAL INSTRUMENT CO., LTD., by Eldon H. Bernstein (Lynn University) & David Yu (Beijing Associates)	33
COMMUNICATION WITHIN MULTICULTURAL TEAMS, by Nirupama Akella (University of South Alabama) & Devi Akella (Albany State University)	34
DENNY'S LEARNS TO MANAGE DIVERSITY, by Stephen J.J. McGuire (California State University, Los Angeles)	35
DEVELOPMENT OF THE BUDDHIST TZU CHI FOUNDATION – FREE CLINIC, LOS ANGELES, by Hui-Hsin Chen (California State University, Los Angeles)	36
EBAY UNDER FIRE: FRAUD ATTACKS AND COMMUNITY UNREST, by Gary M. Griksheit & Scott Newman (University of Utah)	37
AN ETHICAL DILEMMA ON A JANUARY MORNING: WHEN STUDENT RIGHTS AND INSTITUTIONAL RESPONSIBILITIES COLLIDE, by Gary M. Griksheit, Susan Chesteen & Abe Bakhsheshy (University of Utah)	38
THE HEART TOUCH PROJECT, By Gina O. Dayao (California State University, Los Angeles)	39

	<u>PAGE</u>
KAISER PERMANENTE-FRESNO: MANAGING EMR & PATIENT SAFETY, by Alisa Aunskul, Oshin Babaian, Gina O. Dayao, Fernando Iniguez & Patricia Robbins (California State University, Los Angeles)	40
LIGHT UP THE WORLD: RIGHT PERSON? RIGHT PLACE? RIGHT TIME?, by Sandra Malach & Robert Malach (University of Calgary)	41
LINEAR SYSTEMS: THE RE-INVENTION OF AN ORGANIZATION-THE DIGITAL IMAGING FUTURE, by Issam Ghazzawi & Kevin S. Marshall (University of La Verne)	42
THE LIVING GOSPEL CHURCH: BLESSED OR YOUR MONEY BACK, by Deborah Jones, Marmi Maramot, Alexandre Le & Michelle Williams-Evans (California State University, Los Angeles)	43
ORGANIZATION ETHICS AT HARRIS & ASSOCIATES: PRESERVING A HERITAGE, MINIMIZING RISK, by David W. Gill & Nelson Shelton (St. Mary's College of California)	44
SATYAM COMPUTERS: INDIA'S ENRON?, by Vijaya Narapareddy (University of Denver)	45
7 DAYS INN: AT THE CUTTING EDGE OF BECOMING A LEADER, by Xuefei Zhong (Guangdong University of Foreign Studies)	46
TALENT MANAGEMENT IN A PROFESSIONAL SERVICE FIRM, by Yuliya V. Ivanova (University of Alaska Southeast) & Joan Winn (University of Denver)	47
TNK-BP: TREAD WITH CAUTION, by Chirag Asaravala, Christopher T. Bluhm, Catherine Li, Brett Threlkeld, Mary Vradelis & J. Tomas Gomez-Arias (St. Mary's College of California)	48
TO SMOOTHIE OR NOT TO SMOOTHIE? by Michelle Tse (California State University, Los Angeles)	49
VENICE FAMILY CLINIC: HOMELESS HEALTH CARE, by Antonio Flores (California State University, Los Angeles)	50
WESTERN UNION IN 2008: SEND ME THE MONEY!, by Armand Gilinsky (Sonoma State University)	51
WHERE TO INVEST WHEN THE SKY IS FALLING, by Jennifer Harrison & Lauren Lo Re (Westminster College)	52

CONFERENCE PRESENTATIONS

Western Casewriters Association Conference

“What Makes a Great Case Study?”

Joan Winn

University of Denver

Joan Winn is Professor of Management at the Daniels College of Business at the University of Denver. She received her Ph.D. from the University of Georgia in competitive strategy and human resources management. Dr. Winn has conducted research on business turnarounds, entrepreneurship and strategic positioning, international management and organizational culture. She was president of the Western Casewriters Association and the U.S. Association for Small Business & Entrepreneurship, and is currently on the board of North American Case Research Association. She received the “best case reviewer” award from *Entrepreneurship Theory and Practice* in 2007, and was named “JMI Outstanding Scholar” by the Western Academy of Management in 2008.

“Publishing Case Research”

Joint session with the WAM doctoral and junior faculty consortium

Armand Gilinsky, Jr.

Sonoma State University

Armand Gilinsky, Jr. is Professor of Business at Sonoma State University, where he has taught Strategy and Entrepreneurship since 1998. In recent years he has served as Director of Sonoma State’s Entrepreneurship Center, Wine Business Program, and Small Business Institute. He previously held teaching appointments at the Harvard Business School, CSU Hayward, and Northeastern University.

North American Case Research Association (NACRA) member since 1994, Armand has also served as Director, Western Region (1998-2000), Local Arrangements Chair (Santa Rosa, 1999), Director-at-Large (2001-2003), member of the *Case Research Journal* Editorial Board (2001-present), and program chair for the 2009 NACRA conference in Santa Cruz, California. To date, he has co-authored three award-winning NACRA cases and published ten cases in the *Case Research Journal*.

CASE WRITING: TIPS & TOOLS

[Why is an iPod like a bottle of wine?]

Armand Gilinsky

Sonoma State University

Western Academy of Management/

Western Casewriters' Doctoral Consortium

Midway, Utah

March 19, 2009

QuickTime™ and a
decompressor
are needed to see this picture.

1

Why bother?

QuickTime™ and a
decompressor
are needed to see this picture.

✓What do an iPod & a bottle of wine have in common?

✓What do I want to teach today?

Content
Tools



Decision-
making

2

Four Anchors...

Superior case opportunities:

Create or add significant value

Solve a problem or meet a need

Demonstrate potential for debate

*Promote visibility**

** Internal -- H RTP/Deans*

** External -- Community, Donors*

3

Negotiating w/"client"

- Valid Consideration
- Mutual Consent
- WIIFM?
- Expectations
- Mixed Motivation
- Concerns
- Roles & Responsibilities

4

Class testing cases

- Invite a note-taker
- Watch someone else teach
- Check for information gaps
- Check for "dead air"
- Is class evenly split on solution?

5

Overall evaluation

Is this a "go" or a "no-go"?

Conference
presentations

Responding
to reviewers

6

Hot Topics: 'PACE' model

Positioning:
Broad v. focus = success?

Adversaries:
Competition v. Co-opetition?

Corporatism:
Wisdom of diversity?

Ethical Issues:
Social responsibility?

7

What are my goals?

- Teaching case or Research case?
- Multiple case comparisons
- Look for 'outliers' or mavericks

- Matched pairs: 'like' or opposites
 - Compare & contrast
 - Theory-building (Yin, 1994; Eisenhardt & Graebner, 2007; Sigglekow, 2007)

8

Putting It All Together:

	Administrative	Entrepreneurial
Exploit	Beringer Brown-Forman Constellation Brands Diageo	Girard Winery Villa Maria Estates
Explore	Delicato Stone Creek Whistling Bird	Ceja Winery Sula Vineyards

A Technocrats — portfolio builders via diversification
B Value innovators — 'best cost' providers
C Niche players — high end, differentiated
D Wannabes — struggling to grow, or satisfied with status quo

9

The iPod and Bottle of Wine:

	iPod	Wine
Similarities	<ul style="list-style-type: none"> ✓ High value-added, inside the package ✓ Global content, produced locally ✓ Significant margins ✓ Lifestyle statement ✓ Socialization across cultures ✓ Best cost differentiation ✓ Ease of use 	
Differences	High Tech	High Touch

10

“Effective Facilitation of a Case Study in the Classroom: A Demonstration Using a Short Case”

Jeffrey P. Shay

University of Montana

Dr. Shay is currently an Associate Professor and the Poe Family Professor of Entrepreneurship at the University of Montana’s School of Business Administration where he has earned six teaching awards. Dr. Shay will be moving to Virginia this summer to assume his new role as the Johnson Chair in Entrepreneurship at Washington and Lee University. He has also taught courses for the London School of Economics, Peking University, and University of Brescia. He earned his B.S. in Finance and Entrepreneurial Studies from Babson College (1987), his MBA in Strategic Management from Babson College (1991), and his Ph.D. in International Business from Cornell University (1999). In terms of research, he has published his work in *Academy of Management Journal*, *Journal of International Business Studies*, *Journal of Management Inquiry*, *Journal of International Management*, *Long Range Planning*, *International Journal of Cross-cultural Management*, *Case Research Journal*, *Journal of Management Education*, and the *International Journal of Organizational Analysis*. Dr. Shay currently serves on the executive boards of Western Academy of Management and North American Case Research Association and on the editorial review board of *Case Research Journal* and *International Journal of Organization Analysis*. Dr. Shay received the 2006 received the Ascendant Scholar Award from the Western Academy of Management and is a past president of the Western Casewriters Association.

Dr. Shay will be using the short “Robin Hood” case in his session, which is reproduced with permission on the following pages of the Proceedings.

ROBIN HOOD, INC.

by Tom Cullen (Cornell University);

modified by Jeff Shay (University of Montana)

***Case reproduced with the permission of the author for the purpose
of facilitating a discussion at the***

Western Casewriters Association Conference 2009.

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Contact Jeffrey P. Shay (jeff.shay@business.umt.edu)

Robin Hood's initial confrontation with the Sheriff of Nottingham that forced him to find refuge in the relative safety of Sherwood Forest seemed so long ago. Now, exhausted from a day of trying to find rich people to steal from so that he and his Band of Merry Men could give to the poor, Robin Hood rested on favorite hillside watching the sun disappear into the horizon and reflecting on his current dilemma. He recalled how easy was when he first entered the wealth redistribution business, "There were plenty of rich people traveling through the Forest. Simply hide behind a tree, jump out, and take their money. It was easy back then." Recently, however, the local wealth redistribution business faced an increasingly difficult market environment.

During the past few years Robin's activities grew from a solo act to a full orchestra. Under Robin's leadership, his organization, the Band of Merry Men, grew rapidly. The group consisted of individuals who suffered or witnessed suffering at the hands of the Sheriff similar to what Robin himself experienced. Robin's requirement for becoming part of the organization was simple: Robin asked only that each member serve the general cause of the organization.

The Band of Merry Men mainly attracted individuals who chose to live outside the law. Robin worked hard with the Band, developing discipline and a sense of common purpose. Robin Hood's passionate devotion to his vision and interpersonal skills made him a natural and well-respected leader of the organization. Although in the beginning Robin Hood made all decisions for the group, the growing size of the organization forced him to focus on only the most important decisions. He delegated less critical matters to a group of trusted lieutenants. These men included:

Little John - Chief Trainer and Director of Human Resources. He was in charge of interviewing prospective candidates, training, and maintaining discipline.

Miller's Son - Director of Food, Beverage, and Equipment. His responsibilities included feeding the Band and assuring that they were properly equipped.

Scarlock – *Corporate Financial Officer* – As the Band's financial guru, he secured stolen treasures, paid the Band of Merry Men, and safeguarded the Band's assets and other valuable resources.

Will Scarlet - *Chief Knowledge Officer*. He was in charge of intelligence, kept track of the Sheriff's plans as well as the travel plans of rich travelers, merchants and tax collectors.

As the Band continued to grow, so too did Robin's strength in the local market. Recruitment was slow in the beginning, but as word spread about the exciting opportunities in the organization new recruits migrated to Sherwood Forest. The original campsite grew into a small village. The organization was beginning to feel growing pains. It became increasingly difficult to screen new candidates, train fresh recruits, and feed and compensate the whole Band. Robin's quaint group had grown so large that he no longer knew all of his men by name. Robin sincerely missed the camaraderie and intimacy of earlier days.

Discipline was becoming a serious problem for Little John. He could not keep everyone occupied and the men were agitated and restless.

The Miller's son indicated that food was running short. Game stock in the vicinity of the encampment was rapidly being depleted. While he could still buy food from friendly villages on the edges of the forest, purchasing, instead of hunting, used resources that would otherwise be used in Robin's wealth redistribution plan.

Income was also not growing as rapidly as in the past. As word of Robin Hood's wealth redistribution organization spread, travelers sought other routes around Sherwood Forest or traveled with a larger and better-equipped security force. The organization was in trouble; membership was rising while income was falling.

Robin thought about the possibility of changing his tactics. Instead of robbing the rich, he mused, why not convert the roads through Sherwood Forest to toll roads. They could simply charge a flat fee and allow passage through the forest without further harm or loss of property.

"No way," his inner circle said. Little John reminded Robin that the Band had always worked to "*Steal from the rich and give to the poor.*" The Miller's son argued that the townspeople and villagers also had to pass through the forest, and a flat tax would have to apply to them as well. He pointed out that these people were important allies of the Band of Merry Men, and that they could ill afford to offend them. "*We need their support in our fight against the Sheriff,*" he said.

"Change is difficult," Robin thought. "*How long can we keep doing business as we have always done?*" He noted that the Sheriff now employed a larger staff and had more sophisticated equipment to use in pursuing his hated prey. Prince John had recently increased taxes and, with the Royal investment in the mill, had increased the Sheriff's budget significantly. The Sheriff had

more men, more money, and an ever-increasing desire to put the Band of Merry Men out of business. The men of Sherwood Forest were beginning to feel the pressure. Robin felt that the campaign to redistribute the wealth had to be concluded before the Sheriff put them out of business for good.

One possibility was to counter attack the Sheriff. Assassination of the hated lawman, intriguing as it was, would be extremely difficult. He was well guarded, and often changed his place of sleeping each night. Robin had originally hoped that his activities -the robberies and attacks on rich merchants, tax collectors and wealthy travelers - would cause so much domestic unrest that the Sheriff would be replaced. That didn't happen. The Sheriff, it turned out, was married to Prince John's homely cousin, and was politically well connected.

Prince John was a truly evil man. He had put King Richard in prison and ruled as Regent. While the barons had originally supported him, they were now increasingly restless as they realized how unpopular the Prince was among the people he ruled. King Richard (the Lionhearted) could be released from his prison abroad, but only on payment of a ransom. The wealthy landlords and noblemen were considering just that. In fact, they had invited Robin and his Merry Men to join them with a promise of future amnesty if they did.

Robin did not like the idea of joining such a royal intrigue. Prince John had many spies and, while he was irritated by Robin's activities of robbing the rich, he would be really angry with anyone who tried to remove him from power. He would lash out, and, in all likelihood, destroy Robin and the Band.

Robin's musings were interrupted by the sound of Maid Marian's voice. *"Robin,"* she said, *"Come join us for dinner and stop daydreaming. You know you have to work tomorrow. The Duke of Earl is scheduled to pass through the forest. You'll need your strength, and this is no time to be missing a meal."* Robin agreed, but told himself that he would have to address his Band's problems tomorrow evening at the latest.

1. Who are the relevant stakeholders in this case?
2. What is the current mission of Robin and his Band of Merry Men?
3. What factors are influencing the band's revenue stream? What factors are influencing the band's cost structures and profitability?
4. What are the environmental threats and opportunities that the band faces? What are the band's strengths and weaknesses?
5. What is the key problem or issue that must be decided?

TABLE ASSIGNMENTS

Western Casewriters Association Conference

Table 1: Challenges in Governance and Leadership (Table Leader: Joan Winn)

EBAY UNDER FIRE, by Gary M. Griksheit & Scott Newman
TALENT MANAGEMENT IN A PROFESSIONAL SERVICE FIRM, by Yuliya V. Ivanova & Joan Winn
THE HEART TOUCH PROJECT, by Gina O. Dayao
THE LIVING GOSPEL CHURCH, by D. Jones, M. Maramot, A. Le & Michelle Williams-Evans
TNK-BP: TREAD WITH CAUTION, by Chirag Asaravala, Christopher T. Bluhm, Catherine Li, Brett Threlkeld, Mary Vradelis, and J. Tomas Gomez-Arias

Table 2: Turning Firm Strategy into Value (Table Leader: V. Seshan)

7 DAYS INN: AT THE CUTTING EDGE OF BECOMING A LEADER, by Xuefei Zhong
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COMMUNICATION WITHIN MULTICULTURAL TEAMS, by Nirupama Akella & Devi Akella

Table 4: Different Faces of Entrepreneurship (Table Leader: Armand Gilinsky)

LIGHT UP THE WORLD, by Sandra Malach & Robert Malach
TO SMOOTHIE OR NOT TO SMOOTHIE? by Michelle Tse
VENICE FAMILY CLINIC, by Antonio Flores
WESTERN UNION IN 2008, by Armand Gilinsky
LINEAR SYSTEMS, by Issam Ghazzawi & Kevin S. Marshall

Table 5: Challenges in Organizational Ethics (Table Leader: Steve McGuire)

DENNY'S LEARNS TO MANAGE DIVERSITY, by Stephen J.J. McGuire
DEVELOPMENT OF THE BUDDHIST TZU CHI FOUNDATION – FREE CLINIC, by Hui-Hsin Chen
KAISER PERMANENTE-FRESNO: by Alisa Aunskul, Oshin Babaian, Gina O. Dayao, Fernando Iniguez & Patricia Robbins
ORGANIZATION ETHICS AT HARRIS & ASSOCIATES, by David W. Gill & Nelson Shelton
SATYAM COMPUTERS, by Vijaya Narapareddy

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

Western Casewriters Association Conference

WCA's annual Conference is a developmental workshop. Each person contributes to each case discussion and in turn receives feedback from each other person at the roundtable. Participants' preparation prior to the Conference and active participation at the Conference are crucial to the roundtable discussions and the value added that the Conference can deliver.

PURPOSE OF WCA CASE ROUNDTABLE DISCUSSIONS

Our purpose is to assist all case researchers to improve their cases for use in classes, for adoption by others, and for publishing. 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 improve their cases. Therefore, all participants must thoroughly prepare all cases and instructor's manuals (IMs). The discussion process is rigorous yet done in a supportive manner. You should expect that the first case discussed, long or short, will take more time than those that follow. Some issues will occur in several cases; discussion thereof need not be repeated after the first time they arise.

HOW TO PREPARE YOUR CASE CRITIQUES

We focus on major as well as subtle ways to improve cases, not on proofreading details of grammar, spelling, etc. To give helpful kind of feedback, you may (1) mark up the cases and IM, 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?
- 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

Roundtable Leaders: Brief session participants about what will happen. Determine the case sequence. Be sure there is a recorder for each case. Guide the discussion. Keep the focus on important issues, not on proofreading. Discourage repetitious comments.

Recorders: Record the substance of comments. One extra copy of each case and IM will be available if you wish. Give your notes to the case author(s).

Case Researcher Authors: Prepare some opening remarks that explain why you wrote the case, how you have used it in class, and any issues you are particularly looking for suggestions as to how to improve. Listen to the comments and ask questions.

Discussants: [Other authors and participants] Prepare cases thoroughly and participate actively.

OTHER POINTS

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, and we have planned the WCA Conference to provide interesting, enjoyable, and instructive activities.

AFTER THE WCA CONFERENCE

Revise your case and IM to improve them. Carefully consider all session comments; some changes may not be appropriate or feasible; you must decide what to change and what not to change. Some suggested data may not be available. However, you are likely to see the more cogent changes you don't make in reviews of your case when you submit it to a journal. Can you defend your choices when you respond to reviewer? Test-teach the revised case and update your IM based on that teaching experience. Get 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 didn't include. (The author always knows details not included in the case.)

Submit your revised Case and IM to the *Case Research Journal* or to another 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, it may be an appropriate fit with another journal. Once your case is accepted by a journal, or finally rejected, it is then appropriate to submit it to book authors for adoption. Earlier acceptance by book authors disqualifies your case for most journals. Book acceptances often carry merit, depending on your school, 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 and Stephen McGuire for WCA's purposes. WCA thanks NACRA for use of the document.

OPPORTUNITIES FOR ASSUMING A LEADERSHIP ROLE

Western Casewriters Association

For those participants at the Conference who wish to become more involved, WCA has leadership positions available. Look in the Conference Proceedings for the list of officers and inform one of them of your interest. In addition, we encourage WCA participants to become active in one of our international and regional affiliates and associate organizations. These include the North American Case Research Association (NACRA), the Eastern Case Association (Eastern Casewriters), the Southeastern Casewriters, and the Southwestern Casewriters. Participation in any or all of these groups is encouraged, and will assist participants in accomplishing many of the same goals they had in joining WCA.

JOIN THE WCA WIKI ON PUBLISHING CASE RESEARCH

After the 2008 WCA Conference, WCA members started a wiki about publishing opportunities for case research, including a list of peer-reviewed journals that publish case studies. Want to learn about publishing opportunities? Know a peer-reviewed journal that publishes case studies? Help us keep the list of publishing opportunities up to date. Feel free to join the WCA wiki at <http://casepublishing.wetpaint.com/>

CALL FOR CASES:

Western Casewriters Association Conference 2010

**Sheraton Keauhou Bay Resort
Kona, Hawaii**

March 25, 2010

Submission deadline: January 10, 2010

<http://cbe.calstatela.edu/wca.html>

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

The WCA Conference is an excellent professional development opportunity because it is a "developmental" meeting designed to provide feedback from experienced case researchers. Our objective is to help participants move their projects toward eventual publication in journals such as the *Case Research Journal*.

The format is roundtable discussions. You will be grouped with four to six other case researchers with an experienced facilitator. Participants will provide detailed feedback on each others' cases. The feedback, although rigorous, is very friendly. Or, you may attend the conference to learn more about case research or how to teach with cases.

Cases should deal with issues important to their disciplines. They are generally framed around problems facing some decision maker in the organization. Cases may be based on field research or secondary sources but must be entirely factual. Cases from all disciplines and researchers of all experience levels are welcome.

SUBMISSIONS: Submit case and instructor's manuals or volunteer to review cases by contacting Steve McGuire at smcguir@exchange.calstatela.edu.

Who should attend the WCA Conference?

- Researchers looking for a peer-reviewed platform to develop their case research;
- Researchers interested in learning more about case research;
- Educators looking to improve their performance by making the best use of cases.

Awards will be provided for BEST CASE in the Proceedings and BEST MENTORED CASE. For information on the Western Casewriters Association and the 2009 Conference, visit our website at <http://cbe.calstatela.edu/wca.html>.

CALL FOR CASES

Case Research Journal

Special Issue on

Corporate Social Responsibility and Business Ethics

Submission deadline: December 1, 2009 for publication in 2010

www.nacra.net

The *Case Research Journal* will publish a special issue on corporate social responsibility and business ethics, to be guest-edited by Professor Anne T. Lawrence of San Jose State University.

The *Case Research Journal*, published quarterly by the North American Case Research Association (NACRA) and XanEdu Custom Publishing, is dedicated to enhancing case research and publishing exceptional teaching cases. Founded in 1980, the *CRJ* is double-blind refereed and accepts about fifteen percent of manuscripts submitted. Further information about the Journal is available at www.NACRA.net by selecting the *Case Research Journal* link.

Domain of the Special Issue

The domain of the special issue is broadly defined as teaching cases in corporate social responsibility and ethics. Appropriate topics include (but are not limited to):

- Socially responsible or irresponsible actions by firms
- Ethical aspects of corporate environmental impacts
- Accounting fraud
- Business law and business ethics
- Codes of ethics and ethics policies
- Conflicts of interest
- Corporate citizenship
- Corporate governance
- Corporate social responsibility in a global or comparative context
- Corrupt practices
- Crisis management
- Customer rights
- Employee rights
- Ethical and social aspects of new technologies
- Ethical or unethical behavior by individuals or organizations
- Ethics in accounting and finance
- Ethics in information systems
- Ethical marketing; deceptive advertising; advertising to children
- Human rights impacts of corporate behavior
- Interactions between firms and NGOs
- International issues and ethical concerns
- Political influence by business
- Shareholder rights
- Shareholder activism; socially responsible investment
- Social and environmental auditing
- Social and environmental responsibility in supply chains
- Social entrepreneurship
- Stakeholder dialogue and engagement

Focus and Methods

For this issue, the *CRJ* will publish only decision or issue-focused cases based on original, primary research.

Focus: Cases should be focused on a decision, issue, or problem facing an individual, an organization, or a group of organizations. After studying the case, students should be able to put themselves into the situation and formulate and defend alternative courses of action.

Methods: Cases should be based on original, primary research. Examples of such research include (but are not limited to):

- Field research in the organization
- Interviews with key decision-makers in the organization
- Interviews with stakeholders impacted by a n organizational decision, issue, or problem
- Review of primary materials, such as legal proceedings, congressional testimony, or internal company or stakeholder documents.

The *CRJ* does not publish cases based solely on secondary sources, such as journalistic accounts. It also does not publish fictionalized, composite, or hypothetical cases. Occasionally, the *CRJ* publishes papers about case writing and teaching. Such papers will be considered for this issue if they are relevant to the special topic domain.

An Instructor's Manual (teaching note) must accompany each case submission. The IM should follow the guidelines outlined at: <https://www.nacra.net/crj/Pages/edpol.php5>

North American Case Research Association

Authors are encouraged (but not required) to submit cases to the North American Case Research Association 2009 annual meeting, to be held in Santa Cruz, California at the Chaminade Resort & Spa, on October 29-31, 2009. This will enable authors to receive and respond to feedback on their case prior to submission to the special issue. For details, visit: <http://www.nacra.net/meeting2009>. At the time of submission, at least one author must be a member of NACRA. (Membership information is available at www.NACRA.net.)

Further Information

For further information regarding this issue or a potential submission, please contact:

Anne T. Lawrence, Guest Editor for the Special Issue

lawren_a@cob.sjsu.edu or (408) 924-3586

Tupper Cawsey, Editor, *Case Research Journal*

tcawsey@nacra.net or (519) 747-9147

CALL FOR CASES/PAPERS/SYMPOSIA:

North American Case Research Association

**Chaminade Resort & Spa
Santa Cruz, California**

October 29 – 31, 2009

Submission deadline: Monday, June 15, 2009

www.nacra.net

NACRA is a collaborative organization of about 500 casewriters and teachers, who support each other's research and writing efforts. Our members are from all over the world, teach at many types of universities and offer expertise in various disciplines.

Chaminade Resort & Spa. The AAA Four Diamond award-winning Chaminade Resort & Spa is a spectacular mountaintop retreat in Santa Cruz. The historic Mission-style resort overlooks sweeping views of Monterey Bay and the Santa Cruz Mountains. Chaminade is a luxurious destination for executive meetings, celebrations and getaways. Chaminade is just five minutes from golf courses, beaches and downtown Santa Cruz. Escape to a haven of unsurpassed service.

Registration. Register for the conference online at www.nacra.net. The registration fee includes conference materials and Thursday evening dinner, all meals on Friday, and breakfast and lunch on Saturday. The conference adjourns after Saturday lunch. Conference registration also includes one-year membership in NACRA and subscriptions to the *Case Research Journal*.

Conference Format. At case roundtable discussions on Friday and Saturday mornings all authors receive suggestions about their cases in a constructive atmosphere. Afternoon sessions include presentation of papers and symposia. Newcomers to NACRA and/or case writing are invited to a Newcomers' workshop held Thursday morning, October 29, 2009. Newcomers may also submit an "embryo" case. See www.nacra.net (Annual Meeting Info) for details.

Eligible Cases. Cases may deal with any topic in any academic discipline where dynamic classroom discussion is useful. Cases must be original work based on real events, real people, and real organizations, and must not have been previously published or accepted for publication elsewhere, either in journals or books. Submitted cases may also not be under simultaneous review for other conferences or publications. Cases presented in other workshops may be submitted only if they have been substantially revised since that presentation; authors should describe the case's previous history in their submittal letter.

Author Participation. If accepted, the submission must be presented. In consideration of having a submission reviewed for the conference, you are committing to having at least one author attend and participate in the roundtable discussions or paper/symposia presentation. Each case must be presented by at least one author who participates in both the Friday and Saturday morning roundtable sessions. No more than two cases may be presented in the same track by the same author.

Submission Details. Submissions should be sent by email attachment to the appropriate track chair by Monday, June 15, 2009. Include one file with the cover page, submission form, and case summary or paper abstract. Include the case and instructor’s manual (IM) or paper submission in a separate file that does not contain any information identifying the authors. Symposia proposals may be sent in a single file. See www.nacra.net (Annual Meeting Info) for the required forms and format. Submit your case to only one Track Chair, indicating in your submittal letter if you feel it may be appropriate for other tracks. Contact the program chair if your case does not seem to fit one of the tracks listed.

TRACK	CHAIR	AFFILIATION	TELEPHONE	EMAIL
Accounting	Kay Guess	St. Edward’s Univ.	512.448.8562	aundreag@stedwards.edu
Business & Society/Ethics	Emmanuel Raufflet	HEC Montreal	514.340.6196	emmanuel.raufflet@hec.ca
Cases in Spanish	Jorge Gonzalez	Tecnológico de Monterrey Campus, Guadalajara	(52) 33.36.69.3000 x3908	jgonza@itesm.mx
Education	Margaret Bouchard	Worcester State College	508.929.8840	mbouchard@worcester.edu
Finance/Economics	Jonathan Welch	Northeastern Univ.	617.373.4572	j.welch@neu.edu
Information Technology Management	Janis Gogan	Bentley College	781.891.2098	kgogan@bentley.edu
International Business	Josep Franch	ESADE	(34) 93-495-2132	josep.franch@esade.edu
Marketing	Tom Buckles	Biola University	562.903.6000 x5179	tom.buckles@biola.edu
NFP/Health Care/Social Work	Jim Fisher	Saint Louis Univ.	314.977.3854	fisherje@slu.edu
Operations/Supply Chain Mgmt.	Joseph Kavanaugh	Sam Houston State Univ.	936.294.1236	MGT.JKK@shsu.edu
OB/OT/HRM	Charles Carson	Samford University	205.726.2464	cmcarson@samford.edu
Small Business/Entrepreneurship	Stephen McGuire	CSU Los Angeles	323.356.3475	steve@mcguire.net
Strategy	Randall Harris	CSU Stanislaus	209.667.3723	raharris@csustan.edu
Social & Environmental Entrepreneurship	Vijaya Narapareddy	University of Denver	303.871.2198	vnarapar@du.edu
Teaching with Cases - Papers	Michael Welsh	University of South Carolina	803.777.9118	mwelsh@gwm.sc.edu
Case Research for Theory- Papers	Marie Rock	Bentley College	603.868.7080	MROCK@bentley.edu
Newcomer’s & “Embryo” Cases	Jeff Shay	University of Montana	406.243.2273	jeff.shay@business.umt.edu

Western Casewriters Association

CASE SYNOPSES

**WESTERN CASEWRITERS ASSOCIATION
CONFERENCE**

**March 19, 2009
Midway, Utah**

AIR-LIMO TRANSIT: LAUNCHING AN AIR TAXI SERVICE

Eldon H. Bernstein & Colleen P. Braun
Lynn University

Case Synopsis

As part of an MBA course in entrepreneurship, 4 students proposed to start an air taxi service, taking advantage of the new generation of VLJ (Very Light Jet) technology. After showing the project to several private investors who expressed interest in the concept, they have decided to prepare to launch the new venture, which they have named Air-Limo Transit, or ALT. Nick Chai, who would be the head of the management team, was pouring over his figures one last time before meeting with the investors to discuss the additional financing that the venture required. He was rehearsing how he would make his presentation.

Case Learning Objectives

The Air-Limo Transit case can be used in undergraduate and graduate courses in strategic management, marketing, and operations. It relates the efforts of a group of students who met in an MBA class to secure funding for a start up air taxi service.

The objective of the case is to illustrate the groundwork necessary in launching a new business and to allow students to design a strategic plan.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 19, 2009, Midway, Utah. All rights reserved to the authors. Contact: Eldon H. Bernstein, Lynn University, 3601 North Military Trail, Boca Raton, FL 33437, (561) 237-7008, ebernstein@Lynn.edu.

ALLOCATING WORK FAIRLY

Jyoti Bachani
Saint Mary's College of California

Case Synopsis

This case presents aspects of managerial justice from the perspective of an employee and a manager of Eco Electric. While working as a junior electrician for Eco Electric, twenty-nine year old Todd Wells felt treated unfairly when his manager gave a lucrative overtime job to two other co-workers, without asking him first. As a dedicated and hard working contributor to the company, who usually did the overtime jobs, Wells was angry with this situation as he perceived it to be unfair for his manager to have allocated the work to others without offering him the right of first refusal. His manager, Hinkle, felt that it was fair to offer the work to others without consulting Todd since Todd usually did a lot of overtime routinely, and others were more likely to accept this particular assignment.

Case Learning Objectives

The primary objective of the case is to illustrate a common managerial situation and allow students a chance to apply a theoretical model of organizational justice to solve the managerial problem. The narrative raises the following questions: Was Hinkle being unfair to Todd? Would he have been unfair to other electricians if he had offered the plum assignment to Todd? What is the standard of fairness for a manager? What do theories of organizational justice teach us about common managerial situations like this one?

The author developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 19, 2009, Midway, Utah. All rights reserved to the author. Contact: Jyoti Bachani, Saint Mary's College of California, (650) 948-4090, jb19@stmarys-ca.edu.

ASIAN YOUTH CENTER: ADAPTING TO CULTURAL EVOLUTION

Motaz B. Abutarboosh, Vera Danho, Wanida Jaiaree & Ezgi Kumkumaglu
California State University, Los Angeles

Case Synopsis

“So as AYC has expanded geographically and begun serving more ethnic groups, we’ve had a challenge with public relationships. When we want to advertise to a target population that is Non-Asian such as black or Hispanic - the name of the organization turns off potential clients and partners. When we try to create a PR image that is more diverse, such as "AYC: Serving youth of All Ethnicities," then the Asian donors want to know why they should give us their money.”

Michelle Freridge, Asian Youth Center’s Development Director

The Asian Youth Center (AYC) was a non-profit, Asian community-based organization that served the social needs of youth and families. AYC began in 1989 as a project after the United Way’s Asian Task Force found a critical lack of services for Asian youth in Los Angeles County. From 1996 to 2003, AYC expanded its scope to serve non-Asian youth and families including culturally appropriate services in Cantonese, Mandarin, Vietnamese, Spanish and English languages. AYC successfully opened the Youth Center in San Gabriel in 1997 and the Annex in 2003. The Los Angeles satellite office opened in 1998 and served youth from kindergarten through middle school. The Lancaster satellite office opened in 2007 and offered the Operation Read and Home-based Social Services programs.

The case describes the challenges AYC faced in the shifting population it served. Since AYC previously served a predominately Asian community, it had had a challenge with public relationships with potential clients and partners. How could AYC effectively manage this change in the served population? Did the name of the organization create a disadvantage in attracting new donors and preserving current public relationships? In what ways must AYC’s organizational culture change in order to attract and retain diverse employees?

Case Learning Objectives

This case study is appropriate for undergraduate and graduate courses in Business and Society or Nonprofit Management with an emphasis on ethnic diversity. The case permits learning about concepts in human resources management and strategic planning, as well as the difficulties of implementing diversity within the organizational culture. Finally, it addresses the challenge an organization faced when reaching out to new, underserved groups to increase organizational membership.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor’s manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 19, 2009, Midway, Utah. All rights reserved to the authors. Contact: Motaz Abutarboosh, 1020 Lantana Dr., Los Angeles, CA 90042, (310) 782-4455, m_fez75@yahoo.com.

BEE NATURE

Robert M. Patterson
Westminster College

Case Synopsis

The case presents a situation where a new venture called Bee Nature needs outside investment capital to expand its business. Bee Nature sells organic bath and body products and the owners have expertise in formulating and marketing the products. The products have sold well in the first two years and the owners have been approached by a large retailer to sell their products nationally. To meet the retailer's demand, they will need to make substantial investments in their production capability. The owners have no experience raising capital. The Bee Nature case allows students to prepare pro-forma financial statements for Bee Nature given specific assumptions regarding sales, expenses, capital requirements, working capital, etc. After completing the pro-forma financial statements, students will determine the investment required, calculate a valuation for the business, and then determine the % of ownership given to the new investors.

Case Learning Objectives

1. Increase student understanding of financial statements by requiring students to prepare pro-forma income, cash flow, and balance sheet statements.
2. Develop student ability to analyze the economic model of a new venture and learn how changing key assumptions impacts the economic model.
3. Increase student ability to predict cash flow requirements and financing requirements of a new venture.
4. Develop student understanding of new venture valuation methods.
5. Enhance student ability to analyze and solve complex financial problems.
6. Increase student analytical, communication, and decision making skills.

The Bee Nature case is designed to be used in an Entrepreneurial Finance class at the undergraduate (senior finance student) or graduate level. Students should have completed pre-requisite finance and accounting courses.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 19, 2009, Midway, Utah. All rights are reserved to the author. Contact: Robert M. Patterson, Westminster College, Gore School of Business, 1840 S. 1300 E., Salt Lake City, Utah, (801) 232-2674, rpatterson@westminstercollege.edu.

BEIJING AURORA MUSICAL INSTRUMENT CO., LTD.

Eldon H. Bernstein, Lynn University
&
David Yu, Beijing Associates

Case Synopsis

Beijing Aurora Musical Instrument Co., Ltd. (Aurora) was a privately owned small piano manufacturer located in the southern part of Beijing. The company was established in February, 2002, by Mr. Zhao Changxu, a veteran manager of the State Owned Xing Hai Piano Factory with 25 years experience in piano manufacturing. The company had about 100 workers and staff members and produced 2,000 upright pianos annually. Taking advantage of the lower labor costs in China, Mr. Zhao was able to produce an upright piano that would sell at retail for considerably less than those currently on the market. His pianos had been very favorably reviewed by musicians in China and in other countries. Some components were imported from European manufacturers because he believed local producers could not supply the quality he sought for his pianos. Due to the intense competition among Chinese manufacturers, Mr. Zhao, whose small company was struggling to survive, considered the overseas market as a critical strategic option. The prospects were daunting however. Sales of acoustic pianos had fallen sharply, having been replaced in many areas by electronic instruments. Sales of premium grade pianos were confined to a few of the makers of prestigious concert grade equipment. Besides having limited assets, Mr. Zhao had not been able to enlist a reliable dealer in the United States.

Case Learning Objectives

The case is intended for upper level undergraduate or MBA courses in Strategic Management or Marketing, to illustrate the difficulties in entering an international market; to show the importance of alliances; to understand the value of brand names; to appreciate the position of small business owners; to realize the importance of state owned enterprises in China. The case presents an interesting dilemma in small business, particularly in an emerging economy. While Beijing Aurora produces a very credible product at a very attractive price, entering the international market is a difficult chore. As a low cost producer, the availability of a low cost distribution network is critical, but difficult to find. Not having a famous name is another problem. The market is being rocked by competition from electronic pianos also. Attention should be paid to the possibility of China being pressured to bow to world pressures to revalue the Yuan. As the downturn in the U.S. (and world) economy has resulted in a drastic reduction of Chinese exports to the United States, the question should be posed as to whether the U.S. market is attractive at all.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 19, 2009, Midway, Utah. All rights are reserved to the authors. Contact: Eldon H. Bernstein, Lynn University, 3601 North Military Trail, Boca Raton, FL 33437, (561) 237-7008, ebernstein@Lynn.edu, and David Yu, Ph.D. Beijing International Consulting Group, #905 Bldg 108A Guang Ann Men Mei Street, Chong Wen District Beijing China, (86) (10) 6347-7347, Yuda6668@yahoo.com.

COMMUNICATION WITHIN MULTICULTURAL TEAMS

Nirupama Akella
University of South Alabama
&
Devi Akella
Albany State University

Case Synopsis

The case revolves around a situation of conflict between team members. The company in question, APT Corporate, is a diverse consulting firm located in Gaborone, Botswana. APT Corporate has divisions in Auditing, Finance and, Business Consultancy. K.R. is recruited from India to head the Business Consultancy division. K.R. sets about choosing his team. He recruits three professionals from varying fields of management belonging to different nationalities and cultures. Wambere Seletso was a Botswana native from a marketing background with an experience of three years. Sarah Boswell is a French Canadian with a degree in business. Tanu Singh was an Indian with a MBA in HR.

The team does not make any headway as team members are always sparring. The team is ridden with conflict and consequently unable to complete any projects on time. Team members find it difficult to adjust and accept each other's culture and work ethic. K.R. is aware of the cultural differences and wonders what he can do to bring his team together.

Case Learning objectives

The case permits an analysis of multicultural communication and conflict styles for a graduate communication theory classes. This issue will become critical as the world economy becomes more global. The case could be used to facilitate a discussion about multicultural communication in multicultural teams.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 19, 2009, Midway, Utah. All rights are reserved to the authors. Contact: Nirupama Akella, University of South Alabama, #67, 6001 Old Shell Road, Mobile, Alabama 36608, (229) 376-5597, fnr44@yahoo.com.

DENNY'S LEARNS TO MANAGE DIVERSITY

Stephen J.J. McGuire
California State University, Los Angeles

Case Synopsis

The case discusses Denny's Corporation, the largest full-service restaurant chain in the United States, and the evolution of its management of diversity. During the early 1990s, Denny's was involved in a series of discrimination lawsuits involving cases of servers denying or providing inferior service to members of minority racial groups, especially African American customers. The restaurant chain acquired a reputation as a "poster child for racism." Comedian Jay Leno joked that Denny's offered a sandwich called the "*Discriminator: you order it, then they don't serve to you.*" At the time Denny's had no diversity training and almost no members of minority groups held management positions, owned franchises, or had vendor contracts. After a \$54.4 million settlement of the discrimination lawsuits, Denny's rolled out an industry-leading racial sensitivity training program for all of its employees.

In 2008, Denny's had come to be considered one of the nation's best companies in dealing with delicate racial issues. It appeared on lists of top places to work for minorities and women, an indication that it has completely reversed its direction on diversity. Rapid technological change, globalization, the demand for skills and education, an aging workforce, and greater ethnic diversification in the labor market had all contributed to making diversity management a high priority for Denny's and its rivals in the competitive U.S. restaurant industry. However, in spite of its commitment to diversity, Denny's performance suffered. Hard evidence that managing diversity provided a discernable business advantage was elusive.

Case Learning Objectives

The Denny's case is appropriate for undergraduate or graduate courses in Business and Society, Business Ethics, or Human Resource Management that explore discrimination in the workplace, the difficulties of implementing management practices to increase diversity, the challenge of changing an organization to embrace it, and the costs and benefits of a diverse workforce. In particular, the case provides a format for the examination of the question, "Does workforce diversity really enhance firm performance?"

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 19, 2009, Midway, Utah. All rights are reserved to the author. Contact: Stephen J.J. McGuire, CSULA Entrepreneurship Institute, California State University, Los Angeles, 5151 State University Drive, STF 709, Los Angeles, CA 90032, (323) 343-2897, steve@mcguire.net.

DEVELOPMENT OF THE BUDDHIST TZU CHI FOUNDATION— FREE CLINIC, LOS ANGELES: A CASE STUDY

Hui-Hsin Chen
California State University, Los Angeles

Case Synopsis

Respect, compassion, and gratitude were the attitude Tzu Chi emphasized to “aid the poor and educate the rich” and achieve the ideal state of “all beings are equal.”

The Tzu Chi Free Clinic, Los Angeles was founded by the international charitable and humanitarian non-profit organization of the Tzu Chi Foundation, an expanding, worldwide organization with headquarters in Taiwan. After the Tzu Chi Foundation USA was established and acquired popularity in the community, the idea of serving the poor was raised spontaneously. The Buddhist Tzu Chi Free Clinic opened in the city of Alhambra, California in 1993. Serving the community was its main purpose. Based on the spiritual ideas of Tzu Chi, the Free Clinic provided high quality, diverse medical services to the needy – mostly low income residents with no health insurance - regardless of age, sex, race, and religion.

Volunteers provided manpower and community members provided money to work as one to shoulder this task of Tzu Chi, endorsing “universal love.” The clinic was oriented around the Buddhist maxim: “It is more blessed to give than to receive.” Through the Free Clinic, givers were blessed with spiritual satisfaction while recipients acquired physical security and better health.

Case Learning Objectives

The Free Clinic case study emphasizes the concepts of humanism, harmony among human beings, paying back, giving, and receiving. The case may also facilitate discussions about the psychological implications for controlling prejudice and promoting empathy. The case study is appropriate for undergraduate students in courses in the Social Sciences and Humanities. For graduate students, the case could be used in a seminar class on General Management or Non-profit Management as an example of values-based management and strategy.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor’s manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 19, 2009, Midway, Utah. All rights are reserved to the author. Contact: Hui-Hsin Chen, 12311 Edgefield Street, Cerritos, CA 90703, (562) 468-1198, hsinusa@yahoo.com.

eBAY UNDER FIRE: FRAUD ATTACKS AND COMMUNITY UNREST

Scott Newman & Gary M. Grikscheit
University of Utah

Case Synopsis

Set against the backdrop of an actual eBay-sponsored customer event -- "eBay In Person" -- the case took place on the evening of August 31, 2006 at a downtown hotel in Salt Lake City, Utah. This town hall-type forum was hosted by Bill Cole, President of eBay North America, who addressed and took questions from approximately 500 invited eBay users. He talked specifically about a *Wall Street Journal* article that highlighted growing dissatisfaction among eBay sellers with the company's senior management team and recent pricing decisions. He was also made aware of a TV news story which aired the previous evening that claimed eBay takes a relatively passive stance on fighting fraud on its site. Cole asked Tim Payton, who headed eBay's 1,200-person Salt Lake City Customer Support Center, to respond to the story and speak on the array of fraud prevention policies and processes the company has in place to combat ecommerce fraud. The case concludes with Cole taking a question from a vocal audience member who was not convinced that the action plans shared by Cole and Payton will produce the intended results.

Case Learning Objectives

eBay faced two significant strategic challenges, one from outside the company and the other from within its outspoken community of sellers. Identity theft is the fastest growing crime in America, and eBay had become a favorite target for online phishing scams. Thieves were also stealing goods the traditional way and using the auction giant to turn the items into quick cash. Meanwhile, another threat came from the company's seller community, which was up in arms over recent policy changes made by eBay's senior team designed to revitalize eBay's sagging core auction business. This issue had fed negative headlines in the national press.

The case will enable students to: (1) address the challenges of sustaining a core competency while achieving unusually rapid growth, (2) explore how to achieve revenue and profit growth in a maturing ecommerce business, (3) understand the changing value equation for customers over the e-business life cycle, (4) examine the strategies and tools available to fight online fraud-related activities, and (5) investigate the issues related to maintaining a positive service experience while implementing controls and restrictions to protect customer security and data privacy. The case was prepared to use in Management and Marketing courses, with particular emphasis on strategy, service operations, and leadership. It is appropriate for undergraduate and graduate students.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association for its annual conference, March 19, 2009, Midway, Utah. All rights are reserved to the authors. Contact: Gary M. Grikscheit, David Eccles School of Business, University of Utah, KDGB 220, 1645 East Campus Center Dr., Salt Lake City, Utah 84112, (801) 581-7733, mktgmg@business.utah.edu.

AN ETHICAL DILEMMA ON A JANUARY MORNING: WHEN STUDENT RIGHTS AND INSTITUTIONAL RESPONSIBILITIES COLLIDE

Abe Bakhsheshy, Susan Chesteen & Gary M. Grikscheit
University of Utah

Case Synopsis

“The foundation of justice is good faith.”
Cicero

The case describes a veteran academic administrator facing an obdurate student who is challenging the established requirements and protocols of a professional program. After five years in the directorship, Pat Steele must wrestle with a dilemma which deals with balancing the rights of the student, faculty, university, and clients. A strong-minded student has asked that a waiver for an essential program requirement be granted. As the program director, Steel has to understand the rights and duties of all stakeholders and decide what would be fair, just, and right.

Case Learning Objectives

This case can be taught both to undergraduate and graduate students as well as business professionals, senior executives and middle-managers serving in academic, state or federal institutions. The attractiveness of the case stems in part from its comprehensive coverage of topics. The range includes complex decision making processes, dilemmas affiliated with balancing multiple stake holders’ rights and expectations, effective project management, conflict management embedded with intense emotional undertones, as well as moral and ethical implications resulting from the application of a subjective individual value system in an academic setting.

The case explores the application of multiple approaches to sound decision making. It examines ethical and moral quandaries related to perceived individual rights versus organizational obligations. The case applies an academically established model to explore and analyze difficulties in addressing multiple stakeholders concerns and expectations and offers additional alternatives and choices for further debate and exploration

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THE HEART TOUCH PROJECT

Gina O. Dayao
California State University, Los Angeles

Case Synopsis

The Heart Touch™ Project (HTP) was a nonprofit volunteer-based service and educational organization dedicated to the delivery of compassionate touch to homebound or hospitalized men, women, and children. The only organization of its kind in Los Angeles, it trained volunteer massage therapists who visited the most ill and isolated individuals to provide free touch therapy. In the early 2000s, the organization thrived. It received an abundance of grant funding and changed its mission to meet the criterion of each funding agency. HTP created new programs for more ill populations and expanded internationally. But with the end of grant funding and no plan to sustain itself, HTP experienced financial challenges that led to the elimination of a number of programs and a reduction of services offered.

Not having any formal business background, Shawnee Isaac Smith, the founder of HTP, hired outside consultants to analyze the organization and provide suggestions for growth and sustainability. After months of analysis, the consultants concluded that HTP should cease providing programs and services for a minimum of one year while management rebuilt the organization's financial viability and restructured the organization. Shawnee disagreed with the recommendation of the consultants and decided to continue providing services as usual. After all, what would happen to the clients who needed the services that HTP offered? Conversely, what would happen to HTP if change did *not* occur?

Case Learning Objectives

The primary objective of the case is to facilitate discussion regarding the need for long-term planning in any business, whether the objective is profit or service-related. Instructors can use the case to discuss the basic essentials of planning, and the need to determine the organizational mission and set objectives and priorities. The case is appropriate for undergraduate courses in Nonprofit Management or General Management, and may also be used in introductory Nonprofit Management, Strategic Planning, or Management graduate courses that introduce the basic concepts of planning, strategy, and the assessment of the internal and external environment.

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KAISER PERMANENTE-FRESNO: PATIENT SECURITY AND SAFETY “FLAT-LINE” WITH NEW ELECTRONIC MEDICAL RECORDS (EMR) IMPLEMENTATION AND MANAGEMENT

Alisa Aunskul, Oshin Babaian, Gina O. Dayao, Fernando Iniguez & Patricia Robbins
California State University, Los Angeles

Case Synopsis

In April 2005, Kaiser Permanente’s Perinatologist Hamid Safari attached a vacuum extractor to the head of a twin baby boy who was not in distress, and allegedly used excessive force to draw him out. After constant tugging, the baby finally emerged with his spinal cord severed. *“He vigorously shook the vacuum, up and down, side to side...it took 90 minutes and six tries – the last with Safari on his knees, pulling. Horrified staffers – and the baby boy’s father –looked on as baby Devin finally emerged. His skin was a bloodless white, his neck elongated and floppy.”*

In January 2004, Dr. Safari failed to call for an immediate Caesarean section of a baby girl whose fetal heart monitor showed problems, which the baby’s mother, Tanella Bessard, believed to have lead to the respiratory problems, seizures and sudden death months later. With baby Paris in distress during delivery, the Bessard family pleaded for the C-section. However, Dr. Safari, who denied any wrongdoing, stated that Bessard resisted a C-section. Bessard later won an undisclosed settlement against Kaiser after arbitration. She complained to the medical board in 2005 and said "It bothers me he [Safari] is still practicing.”

This is a case about the abuse of electronic medical records, violation of patient privacy, security and safety, and above all about two deaths that could have been prevented. How would you react to management’s lack of response to the numerous complaints about Dr. Safari’s “inappropriate” behavior? How would you feel if your medical records were being discussed and monitored by providers other than your primary care physician?

Case Learning Objectives

The Kaiser Permanente-Fresno case is appropriate for advanced undergraduate or graduate courses in Health Care Management, Human Resources Management, or Business Ethics where different aspects could be emphasized. In a Health Care Management course, students could apply concepts they have learned in strategy analysis and program outcome assessment. In a Human Resources Management course, students could learn about federal laws such as the Health Insurance Portability and Accountability Act (HIPAA) and the Sarbanes-Oxley Act (SOX) and compliance with organizational policies. In a Business Ethics course, students could learn about making complex decisions in an organization.

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LIGHT UP THE WORLD: RIGHT PLACE? RIGHT TIME?

Sandra Malach & Robert Malach
University of Calgary

Case Synopsis

Dave Irvine-Halliday is an engineering professor at the University of Calgary, Alberta, Canada. During his 1997 sabbatical in Nepal he embarked on a trek around the Annapurna Circuit, where it became obvious that the rural villages lacked adequate lighting. He started thinking about the children's ability to read in their homes and schools. Dave concluded that there had to be some way to bring light to the villagers. Upon returning to the University of Calgary, he started working on the solution. Toward the end of 1998 this project resulted in a prototype lighting system for the third world. In 1999, Dave and his wife Jenny took the prototype system to Nepal to determine whether or not Dave had developed a feasible, technological solution to the lighting problem. The local response was overwhelmingly positive.

This case describes the decision that had to be made - whether to bring this technology to those living at the bottom of the pyramid. Should he start a social venture to light up the world? Was he the right person, in the right place, at the right time?

Case Learning Objectives

This case is intended for an introduction to entrepreneurship course or a social entrepreneurship course. It provides an example of a technology-based social venture providing lighting to the third world. Dave Irvine-Halliday and his venture Light Up the World Foundation have received over 20 awards, including the prestigious Rolex Award for Enterprise in 2002 and Readers' Digest Hero of the Year in 2004. The teaching note includes a link to a video that captures the spirit of "Light Up the World."

On the analytical dimension, the problem is a qualitative one and will require the students to identify a business opportunity and make a decision to pursue that opportunity. They may also analyze the characteristics of the entrepreneur and his suitability to found a social venture of this nature.

The theoretical concepts in the case will focus on characteristics of entrepreneurs and opportunity identification and screening. The case will help students to develop and understanding of the multi-faceted factors in determining whether to proceed with a social venture.

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LINEAR SYSTEMS: THE RE-INVENTION OF AN ORGANIZATION -THE DIGITAL IMAGING FUTURE

Issam Ghazzawi & Kevin S. Marshall
University of La Verne

Case Synopsis

From the time of its inception in 1988 until June 1992, Linear Systems' business focus was exclusively on reselling computers and digital photographic equipment. Given the competitive and saturated nature of the market, Chris Parsons (Founder and CEO) recognized the need for change. He commenced transforming Linear Systems, making it a leader in today's digital imaging technology. By September 1998, Parsons had reinvented Linear Systems' principal business purpose-digital photography and software. By leveraging Linear Systems' success in the digital imaging hardware market, Linear Systems was ultimately re-invented into both a software developer and a builder/integrator of computer hardware, the integration of which transformed Linear Systems into a full service digital-data management company providing data management solutions to business and government agencies. While the re-invention process started more than 10 years ago, the breakthrough came in 2005 when several large law enforcement agencies collaborated with Linear to develop its Digital Information management System known as DIMS ImageServer.

The CEO and his management team needed to consider the market opportunity and develop a strategic plan that will successfully position the organization to meet the market challenges for the next five years and help its growth. Thus, the case focuses on the transformation of Linear Systems through the various organizational life cycles and the change process itself.

Case Learning Objectives

This case is intended for advanced undergraduate or graduate courses in Organizational Behavior, Organizational Theory and Behavior, Organizational Development, and Strategic Management. The core pedagogical objective of the case is help to provide an applied, hands-on format for students to increase their understanding of the topics of organizational lifecycle and organizational change and development. The core pedagogical objective of the case is help to provide an applied, hands-on format for students to increase their understanding of the topics of organizational lifecycle and organizational change and development. After reading and responding to the case questions, students should be able to: (1) Assess an organization's mission statement and tie said mission to the organization's goals. (2) Explain the four principal stages of the organization's life cycle: Birth, growth, decline, and death. (3) Identify the major external and internal forces for change in organizations. (4) Understand the nature of change process. (5) Evaluate alternative methods to managing change in today's organization. (6) Explain what a change agent is and who plays this role. (7) Explain what organizational development is and why it is undertaken by organizations.

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THE LIVING GOSPEL CHURCH: BLESSED OR YOUR MONEY BACK

Deborah Jones, Marmi Maramot, Alexandre Le & Michelle Williams-Evans
California State University, Los Angeles

Case Synopsis

The Living Gospel, a non-denominational Bible-based Christian church headquartered in Los Angeles, was not your typical church. For one thing, it had a money-back guarantee. Its donation policy was “*If you give and you are not blessed, then you can ask for your money back.*” In the church’s entire history, only one person felt he was not blessed and asked for his money back (\$800).

The leader of The Living Gospel (LG), Bishop D.L. Jones, had earned an MBA from UCLA. With his skills in management and finance, he helped LG grow to include locations across the US. But after seventeen years of serving in this capacity, he was ready to step down as Bishop. Would the church survive without its unique leader? Who would be able to succeed Bishop Jones?

Case Learning Objectives

The case can be used to emphasize general management and leadership concepts in undergraduate or introductory graduate courses in general management or small business management / entrepreneurship. It could also be used in a nonprofit management or social entrepreneurship course. Concepts that can be explored through the use of the case include analysis of business strategy and organizational structure, and assessment of leadership values and characteristics. In a Social Entrepreneurship course, students may observe how a business education can enable one to become a successful leader in a non-business field.

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ORGANIZATIONAL ETHICS AT HARRIS & ASSOCIATES: PRESERVING A HERITAGE, MINIMIZING RISK

David W. Gill & Nelson Shelton
St. Mary's College of California

Case Synopsis

Engineer Carl Harris and two colleagues founded Harris & Associates (www.harris-assoc.com) in Lafayette, California, in 1974. For the next three decades Harris & Associates established a reputation for reliable, high quality project and construction management services, specializing in public works projects such as wastewater and sewage treatment plants, hospitals, schools, roads and highways. The company grew from its original three employees to a workforce of some 450 by the early 2000s. Most employees continued to work out of the Concord CA headquarters but with a strong southern California branch office in Irvine and, by 2009, some fifteen additional, smaller regional offices in Reno, Las Vegas, Bakersfield, San Diego, Portland (OR), Seattle (WA) and elsewhere west of the Rockies. Harris & Associates has always been a privately-held corporation owned and operated by its shareholders (largely composed of Harris & Associate employees who have purchased stock in their company) through its elected Board of Directors.

By 2004, the size of the company and the dispersion of its staff into offices throughout the Western United States created new challenges for the maintenance of Harris's long-standing mission, ethics, and values --- which, by all accounts, had been a distinct competitive strength --- throughout the organization. Furthermore, founder Carl Harris was in the process of retiring from day-to-day involvement in company leadership and long-time leaders such as Guy Erickson (President), Jim Parmley (VP) and Neil McCosker (VP) were beginning to plan for their own retirement. In the context of such growth, dispersion, and major leadership transition, how best could the company preserve its strong values and ethics and how could it minimize the future risk of ethical misconduct that seemed to plague more and more of its competitors?

Case Learning Objectives

The Harris & Associates case is appropriate for advanced undergraduate or graduate courses in business management, organizational development, ethics, and leadership. By working through the Harris & Associates case, current and future managers will wrestle with the options and choices necessarily made in the course of developing and implementing an appropriate and effective ethics and values program for an organization. Do we develop our own program internally or import a program from an outside vendor? How do outside consultants relate to our own leadership and staff? How do we mobilize the expertise and gain the ownership of our workforce? Do we take a narrow approach that focuses on problem containment and code creation – or a holistic, comprehensive approach that sees ethics in intimate relation to the organization's mission, vision, core values, and culture? As students work through the case they will encounter and reflect upon such questions that faced Harris & Associates and gain a deeper, broader understanding of how to build ethically healthy organizations in various contexts.

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SATYAM COMPUTERS: INDIA'S ENRON?

Vijaya Narapareddy
University of Denver

Case Synopsis

This case focuses on the events that transpired at Satyam Computers, a leading Indian IT Solutions company, following the resignation of Mr. Ramalinga Raju, Satyam's founder and Chairman, on January 7, 2009. Raju's revelation that he had inflated the company's earnings and misled the public with wrong financial statements shocked India and investors from around the world. Satyam's stock price tumbled and lost over 75% of its value in a single day. The Indian stock market also fell precipitously. The Indian Government through its various branches acted swiftly in an effort to repair the damage done and take corrective action. Even though Satyam was reduced to rubble, a number of investors, including leading foreign multinational companies, expressed interest in acquiring the impaired company.

The decisions that the newly reconstituted Board at Satyam faced was whether to sell the company or not, and whether it would be in the best interest of the company to accept offers by Indian or foreign companies without delay.

Case Learning Objectives

The learning objectives of this case are to expose students to the consequences of unethical conduct of leaders and top management in publicly-held companies, and to enable them to step into the shoes of the Board of Directors and evaluate feasible options to revive a distressed company.

This case may be used in undergraduate, graduate, and executive courses in Ethics, Corporate Social Responsibility, and Corporate Governance as it lends itself well to the application of theories and concepts of corporate social responsibility as well ethics and corporate governance.

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7 DAYS INN: AT THE CUTTING EDGE OF BECOMING A LEADER

Xuefei Zhong
Guangdong University of Foreign Studies

Case Synopsis

The news about 7 Days Inn's recent strategic move to obtain the third round venture capital drew quite a lot of attention in China. The budget hotel chain industry in China has undergone dramatic development in the past five years and since early 2007 the industry has experienced integration. 7 Days Inn recently successfully secured funding and has been eager to use the opportunity to become a market leader and go public.

The case describes the industry situation the company is in and the great potential it possesses. Whether the company could become the market leader in this industry in China depended on how the company can strengthen its brand name and next steps to seize market share.

Case Learning Objectives

The 7 Days Inn case is appropriate for advanced undergraduate students in Marketing, Strategic Management, or Hotel Management courses in which students apply concepts including external environmental scanning, internal environment assessment, marketing strategies, brand equity, customer relationship management, strategy execution and measurement.

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TALENT MANAGEMENT IN A PROFESSIONAL SERVICE FIRM

Yuliya V. Ivanova
University of Alaska Southeast
&
Joan Winn
University of Denver

Case Synopsis

The Institute for Professional Development (IPD) was launched in Minsk in 1993, shortly after Perestroika and the turbulent time of Soviet disintegration. With the support of the Soros Foundation and a local Ministry of Privatization, IPD became the most prestigious professional business education and consulting firm in Belarus. Assembling and training a “team of talents” is always difficult, more so in this case because of the nature of local business practices, the proliferation of professional service firms competing for business and state-director clientele, and the lure of opportunities in more stable environments. As IPD gained experience in business education and consulting, different Directors implemented new programs and brought different styles of management. As the organization experiences turnover of its professional staff, its founder and Chairman of the Board, now living in Moscow, is concerned about the role he should take as the organization matures.

Case Learning Objectives

This case is intended for a graduate or advanced undergraduate course in human resources management, or an organizational behavior or strategic management course that deals with leadership transition, management and growth, global business issues and trends, employee retention, or team-building. Specifically, this case highlights employee retention, talent management, and leadership as well as the issues of organizational transition and sustainability in an environment of change and uncertainty. It can be used for the following pedagogical objectives: (1) To study and apply the concept of balanced management practice in professional service firms (issues of knowledge management, talent management, and human resources management). (2) To analyze and discuss the issue of leadership and Board-CEO relations in the context of environmental change and employee development. (3) To acquaint students with the trends of business environments in a country in transition. This case allows students to examine the stages of development of a professional services firm in a turbulent environment and to assess variations of managerial behavior. It also directs students to propose changes that the organization should implement in order for the company to maintain its competitive edge. This case is based on field research, in cooperation with the host organization.

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WESTERN UNION IN 2008: SEND ME THE MONEY!

Armand Gilinsky, Jr.
Sonoma State University

Case Synopsis

In November 2008, Jorge Ochoa, Vice President of Finance, and Raul Duany, Director of Corporate Communications, joined The Western Union Company (WU). Spun off from First Data Corporation in September 2006, WU had been focused on restructuring operations for two years, and had grown its leading share of the consumer money transfer services market from 10 to 17 percent in less than three years. WU was led by the same core group of executives that had managed it under First Data, and continued to carry \$3.5 billion in debt on its balance sheet as a result of the spin-off. Growth of the worldwide immigration population was driving money transfer growth. An estimated 200 million people lived outside their country of origin in 2008, in which year major forces converged that could dampen WU's future prospects. Strategy options on the table included acquisitions of rival money transfer firms, creation of a microlending program for customers, or the development of new financial services products that could be sold through the growing network of 335,000 WU agents worldwide. Nevertheless, WU faced tremendous challenges including an unfavorable operating environment, high levels of legacy debt from the spin-off from First Data, difficulties in implementing its restructuring plan, and changes in technology that made its core business model vulnerable to competitors.

Case Learning Objectives

This case, researched primarily from published sources, was written for a final examination and final presentation assignment in an undergraduate strategic management capstone course. Set in the context of the collapse of many leading financial service institutions and the ensuing downturn of most world economies in 2008, the case makes a nice "bookend" for a strategy course that begins (or ends) with the "Robin Hood" case by Joseph Lampel. Both cases are short, and while Robin Hood's motto is "Rob from the rich and give to the poor," instructors may prompt students to debate whether or not Western Union has an opposite approach, i.e., "rob from the poor and give to the rich."

Students reading this case should be able to:

- Describe the challenges inherent in globalization and diversification
- Perform financial ratio and *pro forma* analyses for strategic decision-making
- Analyze trends in a niche in the financial services industry
- Weigh the pros and cons of strategy options while considering carefully the legal, ethical, and diversity issues with which firms in this niche must contend.

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VENICE FAMILY CLINIC: HOMELESS HEALTHCARE

Antonio Flores
California State University, Los Angeles

Case Synopsis

Venice Family Clinic (VFC) was the largest free medical clinic in the United States. Its mission was “to provide free, quality healthcare to all people in need.” It served the entire low-income or no-income segment of the community who lacked private or public health insurance coverage. VFC was located in Venice, CA, the affluent waterfront section of the city of Los Angeles, CA. It provided extended medical care through seven sites; one of the newest was the Ocean Park Community Center Access Center for the homeless (OPCC), where it recently began operating two exam rooms. VFC provided services to a total of 23,525 patients. One service was Homeless Healthcare, which accounted for about 16% of patients. Homeless Healthcare included clinic-and shelter-based services, street outreach, and case management.

VFC’s focus was on increasing the services that it provided to the ever-growing population of homeless persons in the surrounding areas. It was astonishing how an area such as Venice, with so many homeless shelters in place, still had problems with the growing numbers of homeless people out on the streets. In fiscal year 2007, VFC served 3,500 homeless adults and 140 homeless children through more than 16,000 visits. Venice Family Clinic had initiated several programs to try to keep track of these patients in order to get them proper care. This case describes some of the challenges VFC faced in its day-to-day operations, specifically when trying to persuade homeless people in need of medical attention to accept a ride to one of the Venice Family Clinics.

Case Learning Objectives

The Venice Family Clinic case is appropriate for advanced undergraduate and graduate courses in Health Care Management and Marketing. In a Health Care Management course, students can apply concepts they have learned in strategic assessment and external environmental analysis, classification and types of HSOs, distinctive competencies, and ethical theories and derivative principles. In a Health Care Marketing course, students can apply the concepts of strategic planning, which include mission and vision assessment, and SWOT analysis.

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TO SMOOTHIE OR NOT TO SMOOTHIE?

Michelle Tse
California State University, Los Angeles

Case Synopsis

As consumers became increasingly health conscious, the smoothie industry was the perfect business opportunity within the US fast-service industry. Sales of made-to-order smoothies were expected to raise more than \$2.5 billion in 2008, up from \$989 million in 2002. By 2012, the market was estimated to be \$3.8 billion. Large fast-service companies such as Starbucks, McDonald's and Taco Bell expanded their beverage menus by including fruit juices and smoothies to appease consumer needs. As a result, established smoothie businesses such as Surf City Squeeze, Jamba Juice, and Smoothie King stepped up their marketing strategies to aggressively compete with these other non-smoothie specialty businesses.

The case describes a business dilemma faced by Amy and her siblings, who are entrepreneurs in spirit, but have no business experience. They see an opportunity with smoothies and want to open up a store. Before even deciding exactly what business to open, they find what they consider to be an ideal location. The dilemma is whether they should open up a franchise of a smoothie chain, try to obtain a license, launch their own independent smoothie business, or consider a different type of business altogether. They obtain some information about smoothie business opportunities, including a franchise agreement from Surf City Squeeze – complete except for their signatures. There are advantages and disadvantages to each business type. Considering the pros and cons and their business backgrounds, what is the best business type for Amy and her siblings?

Case Learning Objectives

The smoothie case is appropriate for an undergraduate course in business, an introductory business course for working adults, or potentially as the first case in an undergraduate course in small business management. The case allows the instructor to introduce basic concepts such as licensing and franchising. In appendix, the case provides the details of the Surf City Squeeze franchise agreement.

Students can assess the advantages and disadvantages of licensing, franchising, and “go-it-alone” businesses. An analysis of the strengths, weaknesses, opportunities, and threats (SWOT) can be used to assess the Surf City Squeeze option. Based on their analysis – and personal preferences - students can decide the best business option for a smoothie business, or recommend not to open any business at all.

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TNK-BP: TREAD WITH CAUTION

Chirag Asaravala, Christopher T. Bluhm, Catherine Li, Brett Threlkeld,
Mary Vradelis & J. Tomas Gomez-Arias
Saint Mary's College of California

Case Synopsis

BP, one of the largest publicly listed oil companies in the world, had been operating in Russia since 1997, initially through minority stakes in Russian oil companies and, since 2003, through TNK-BP, a 50-50 joint venture with AAR, a consortium of Russian investors. This joint venture allowed BP access to extensive oil reserves in Russia and was one of BP's most valuable assets, accounting for 25% of BP's production in 2007.

In 2008, BP and its partners in TNK-BP encountered serious disagreements about how to run the company. A string of government actions including raids by the Russian tax police on both BP and TNK-BP's offices in Russia concluded with the cancellation of TNK-BP's British CEO's work visa by Russian immigration authorities. Although BP and its partners reached an agreement in principle to renew the board of TNK-BP and appoint a new CEO in December 2008, by February 2009 they had not been able to appoint a Chief Executive acceptable to both parties.

Case Learning Objectives

This case has been written for a class on the management of international joint ventures, although it can also be used to discuss business in Russia and government's intervention in business and how it affects multinational companies. It is appropriate for a graduate course in international business.

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WHERE TO INVEST WHEN THE SKY IS FALLING

Jennifer Harrison & Lauren Lo Re
Westminster College

Case Synopsis

This case study is in the form of a project. It places students in the role of a financial analyst at a regional asset management firm. The firm is struggling during the tremendous market downturn of 2008. The financial news continues to be negative in early 2009. The problems expand from the housing markets to the financial services sector, the auto makers and the global financial markets. At times, it really does feel as if the sky is falling. As a financial analyst, the student is given the task of building a financial analysis tool in Excel that will focus on fundamental analysis, and result in recommendations regarding the financial strength and investment potential of individual companies. When the overall market is severely down, all companies are available at inexpensive prices. The primary question is which companies have strong fundamentals and appear to be solid investments for the long term.

This case allows students to integrate information from basic accounting, finance and information management classes, into a project that is divided into phases. The project concludes with a completed model and an evaluation method that results in the ranking of a company based on key data, time trend analysis and competitive comparisons. A one – two page Executive Summary will accompany the model and include answers to the discussion questions.

Case Learning Objectives

This case is appropriate for undergraduate introductory courses in business finance or investments. In a business finance course, the focus of the case could be on integrating knowledge from core classes into the process of completing an overall financial analysis of a company. The discussion could expand into performance assessment and the identification of key success factors and distinctive competencies. If used in an investments course, this case would provide students with the opportunity to build an investment analysis model based on fundamental analysis. The discussion could be expanded to include a variety of different valuation models.

This case is designed in phases that also incorporate Excel modeling skills and accounting skills that are the foundation for model building and financial analysis. Each phase could be a stand alone learning experience. Additional phases focusing on stock valuation could easily be added.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 19, 2009, Midway, Utah. All rights reserved to the authors. Contact: Lauren Lo Re, Westminster College, 1840 East 1300 South, Salt Lake City, UT, 84101, (801) 832-2648, llore@westminstercollege.edu.

We hope to see you next year at the

WESTERN CASEWRITERS ASSOCIATION

2010 CONFERENCE,

March 25, 2010,

at the Sheraton Keauhou Bay Resort in

Kona, Hawaii

Aloha!