

*Western Casewriters Association*

**PROCEEDINGS**  
**of the**  
**WESTERN CASEWRITERS ASSOCIATION**  
**2012 CONFERENCE**

**La Jolla Marriott**  
**La Jolla, California**  
**March 22, 2012**

**PROCEEDINGS**  
**of the**  
**WESTERN CASEWRITERS ASSOCIATION**  
**2012 CONFERENCE**

Edited by Duane Helleloid,  
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[www.westerncasewriters.org](http://www.westerncasewriters.org)

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Case synopses may have been edited for length and format.

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# WESTERN CASEWRITERS ASSOCIATION

The Western Casewriters Association (WCA) Conference is held annually in conjunction with the Western Academy of Management (WAM) Meeting. 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 by seasoned 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 discussion. 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. In addition, the conference will help you to learn more about case research and how to teach with cases.

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# HISTORY OF THE WESTERN CASEWRITERS ASSOCIATION

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

The past presidents of the organization include:

Anne Lawrence

Joan Winn

Teri Tompkins

James Spee

Jeff Shay

Joshua Mindel

Bruce Robertson

V. Seshan

Jyoti Bachani

George Whaley

Steve McGuire

Issam Ghazzawi

# WELCOME TO THE CONFERENCE

Welcome to La Jolla and to the 2012 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 should leave at the conference with ideas for improving their cases. Our goal at the conference is to provide authors with specific feedback and helpful suggestions.

The WCA intends to foster a supportive and mentoring conference environment. Some WCA case researchers are highly experienced with multiple published cases, while others are new to the "art and craft" of case writing.

Case studies are both publishable research papers and tools to facilitate learning in the classroom. In addition to the case discussions, this year a number of speakers will share their expertise with participants. Joan Winn will get us started with valuable insights on case writing here and abroad. Duane Helleloid will facilitate a discussion on best practices in case writing with other top notch case writers including: Issam Ghazzawi , Anne Lawrence, and Joan Winn. We will wrap up the conference with reflections on the day and giving out the case awards.

Welcome to the Conference. We hope that you find the experience rewarding.

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# **WCA REVIEWERS**

## ***Western Casewriters Association 2012 Conference*** **La Jolla, California**

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

**John Shepherd**, Ph.D., Kwantlen Polytechnic University

**Issam Ghazzawi**, Ph.D., University of La Verne

**Duane Helleloid**, Ph.D., University of North Dakota

**Gulem Atabay**, Ph.D., Institute of Management Technology

**Anne Lawrence**, Ph.D., San Jose State University

**Stephen McGuire**, Ph.D., California State University, Los Angeles

**Marie Palladini**, J.D., California State University, Dominguez Hills

**Keith H. Sakuda**, Ph.D., University of Hawaii

**V. Seshan**, Ph.D., Pepperdine University

**George Whaley**, Ph.D., San Jose State University

**Leslie Goldgehn**, Ph.D., University of San Francisco

**Chalmer Labig**, Ph.D., Oklahoma State University



# WESTERN CASEWRITERS ASSOCIATION AWARDS

Two awards will be given at the Conference. Reviewers nominated cases to the Awards Committee for selection of the best papers. 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.

The WCA Awards Committee in 2012 was comprised of the two most recent program chairs, **Issam Ghazzawi**, Ph.D. and **Duane Helleloid**, Ph.D. The Western Casewriters Association thanks the Awards Committee members for their contribution, as well as all reviewers who helped narrow the choice of cases for the committee.

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

# PROGRAM

## March 22, 2012

### *Western Casewriters Association 2012 Conference*

**Location all day: Los Angeles & Rancho Las Palmas**

7:30 to 8:30 am	WCA Breakfast <b>Location: Salon E</b> Sponsored by McGraw-Hill on behalf of Frank T. Rothaermel
8:30 to 9:30 am	Introductions (Leslie Goldgehn), Briefing on roundtable etiquette (Duane Helleloid), Introduction of Keynote Speaker (Leslie Goldgehn). <b>Keynote:</b> <b>Joan Winn Ph.D. University of Denver</b> <b>Award winning case writer and speaker</b>
9:30 to 10:15 am	<b>Roundtable Discussions of Cases</b>
10:15 to 10:30 am	Break <b>Location: Santa Clara</b>
10:30 to 11:50 am	<b>Roundtable Discussions of Cases</b>
11:50 am to 1:00 pm	WCA / WAM Lunch <b>Location: Orchids or Salon E</b>
1:00 to 1:30 pm	<b>Western Casewriters Association Business Meeting</b> (All WCA Participants to attend)
1:30to 2:15 pm	<b>Roundtable Discussions of Cases</b>
2:15 to 2:30 pm	Break <b>Location: Santa Clara</b>
2:30 to 3:45 pm	<b>Roundtable Discussions of Cases</b>
3:45 to 4:00 pm	Break <b>Location: Santa Clara</b>
4:00 to 4:45 pm	<b>Panel Discussion: Best Practices in Case Writing</b> Duane, issam, Joan, Anne, Teri
4:45 to 5:15 pm	<b>WCA Conference Reflections</b> (Open Discussion) Awards for <b>"BEST CASE"</b> and <b>"BEST MENTORED CASE"</b>
5:15 pm onward	Join the WAM Social Activities <b>Location: TBA</b>

# TABLE ASSIGNMENTS

## *Western Casewriters Association 2012 Conference*

### **Table 1: Table Leader: Duane Helleloid**

- Millennium – David Kim
- LinkedIn - Scott Bryant
- Social Responsibility or Insanity - Cathy Hartman
- ZMD and Zigbee - Kory Brown

### **Table 2: Table Leader: Issam Ghazzawi**

- WalMart-Issam Ghazzawi
- AIDS Healthcare Foundation - Daniel Luna
- How Was the Family Business Bookkeeper - Denise Guithues Armhein
- Silver Hill Hospital - Felicia Muniz-Caster
- Shattered Glass - Gerald Rossy
- To Tea or Not To Tea - Veronika Krotova
- Discussant: Alex Ballinger

### **Table 3: Table Leader: Anne Lawrence**

- Upper Big Branch Mine - Anne Lawrence
- WalMart- Marie Palladini
- Vodaphone Egypt (B) - Harold Harlow
- Portable Solar Oven - Jacob Massoud
- Social Media - Jo Linda Goodrich

### **Table 4: Table Leader: Kieth Sakuda**

- American Safar Cruises - Keith Sakuda
- Joe Paterno - Patrick Hogan
- Gateways Hospital - Fay Ho
- Copper King Mining Company - Richard Parsons

### **Table 5: Table Leader: Teresa Martinelli-Lee**

- Wall Mart - Teresa Martinelli-Lee
- ASAP Translation.com - Joan Winn
- Feel the Market With Ten Senses – Joan Winn
- Prince George Public Library - John Shepherd
- BioPharma Work Life Balance - Marty Wilson
- Discussant: Sat Paul Panashar

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

This 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 usefulness of the roundtable discussions and the value added that the Conference can deliver. Conference participants typically report that they were delighted with the helpful, constructive feedback they received.

## PURPOSE OF WCA CASE ROUNDTABLE DISCUSSIONS

Our purpose is to assist all case researchers to improve their cases for use in classes, for adoption by others, and for publication. Rarely is a case presented that is ready for journal publishing; yet even such a case can be improved. Case authors may feel overwhelmed by all the suggestions. The process is not negative; rather, we work with you for improvement, just as we expect that you will help others to improve their cases. Therefore, all participants must thoroughly prepare all cases and instructor's manuals (IMs). 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 need not be repeated in detail after the first time the issues 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 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? To faculty? To potential journals?
- Does it address an important issue in the specified course(s)?
- Can teaching objectives be achieved with the case? Does the IM address these?
- Can the IM analysis be derived from the case (and other course material)?
- Are there enough data? Should more be added? Should some be deleted?
- Is the analysis tied to theory?
- Is the case presentation unbiased, or is the author's opinion evident?

## DUTIES OF PARTICIPANTS IN THE CASE ROUNDTABLES

**Table Leaders:** Brief the participants about what will happen. Determine the case sequence. Be sure there is a recorder for each case. Guide the discussion. Keep the focus on important

issues, not on proofreading. Discourage repetitious comments. Be sure to be a time keeper, or assign one.

**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 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.

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 a 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*, the *Journal of Case Research and Inquiry*, 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. WCA members may have suggestions about which journal would be a good outlet for your case. Once your case is accepted by a journal, or finally rejected, it is then appropriate to submit it to book authors for adoption. 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, Stephen McGuire, Duane Helleloid, and Leslie Goldgehn for WCA's purposes. WCA thanks NACRA for use of the document.

# PUBLISHING YOUR CASE RESEARCH

## *Western Casewriters Association*

As it's been said many times before in slightly different ways, *the best case study is a published case study*. Publishing your case in a peer-reviewed journal not only meets the standard of quality expected of all research, but also allows your work to be used by others. That's what you want and that's what WCA wants for you.

For publication outlets for your case research, have a look at the calls for cases on the following pages. For an extensive list of publication opportunities, visit the **WCA Wiki on Case Publishing** at <http://casepublishing.wetpaint.com/> or through the link on our website, [www.westerncasewriters.org](http://www.westerncasewriters.org)

# CALL FOR CASES

**Journal of Case Research and Inquiry (JCRI)**, the peer reviewed online publication of the Western Casewriters Association (WCA). The journal publishes (1) TEACHING CASE STUDIES in business and public administration, nonprofit management, and social entrepreneurship; (2) NOTES - industry or theoretical analyses to accompany cases; and (3) ARTICLES on case research and teaching with cases. The first issue of the journal is planned for Spring 2012.

JCRI will publish cases, notes, and articles online, so that they will be available full-text and free of charge to educators and students. Educators are encouraged to place in their syllabi links to JCRI cases, notes, and articles.

Authors should review the JCRI submission guidelines posted on the website ([www.jcri.org](http://www.jcri.org)), and may contact the editor, Steve McGuire, at [editor@jcri.org](mailto:editor@jcri.org). For information on the Western Casewriters Association, please visit our website at [www.westerncasewriters.org](http://www.westerncasewriters.org)

# CALL FOR CASES

The *Case Research Journal*, publishes outstanding teaching cases drawn from research in real organizations, dealing with important issues in all administration-related disciplines. The CRJ specializes in decision-focused cases based on original primary research (e.g., interviews with key decision-makers in the organization; interviews with stakeholders impacted by an organizational decision, issue, or problem; participant observation; review of primary materials, such as legal proceedings, congressional testimony, or internal company or stakeholder documents) supplemented by appropriate secondary research (e.g., journalist accounts). Exceptional cases that are analytical or descriptive rather than decision-focused will be considered when a decision focus is not practicable. Cases based entirely on secondary sources will be considered only in unusual circumstances.

The *Journal* also publishes articles concerning case research, case writing or case teaching. Previously published cases or articles (except those appearing in Proceedings or workshop presentations) are not eligible for consideration. The *Journal* does not accept fictional works or composite cases synthesized from author experience. Multi-media cases or case supplements will be accepted for review. Contact the journal editor for instructions.

Deborah Ettington, Editor  
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*Western Casewriters Association*

**CASE SYNOPSES**

**WESTERN CASEWRITERS ASSOCIATION 2012  
CONFERENCE**

## **AIDS HEALTHCARE FOUNDATION**

Meha Tandon, Daniel Luna, Kathy Coe, Laura Cervantes (student authors) and Stephen McGuire (faculty supervisor)

California State University, Los Angeles

Aids Healthcare Foundation (AHF) was founded in Los Angeles, CA in 1987, which was a “time of fear and uncertainty that marked the beginning of the AIDS crisis.” (aidshealth.org). Initially, it was called Aids Hospice Foundation, since at that time there were no treatments available and patients needed a place to die that provided care, compassion and dignity.

With the advent of antiretroviral therapy, also known as “the cocktail,” the AHF client need changed from hospice to treatment. AHF was able to meet that need, and subsequently became the nation’s leading AIDS healthcare organization. Moreover, it was so successful in the United States, that it was able to open clinics in 22 countries.

AHF was able to create enterprises within the organization that provided revenue to help it grow. These include Out of the Closet thrift stores, AHF Pharmacies, and managed care programs. These supplemented the government grants and philanthropy that were established early in its history.

As the organization grew, its president Michael Weinstein constantly evaluated options and new ways to generate revenue in order to accomplish goals of providing medical access to every AIDS patient. In 2010, a new venture was to buy private medical practices. The plan to include pharmacies with these practices was a great incentive and part of the strategy for creating new revenue, which ultimately is used to help sustain and open more clinics to help more people.

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## **AMERICAN SAFARI CRUISES: DESTINATION UNWELCOMED**

Keith H. Sakuda

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American Safari Cruises, a division of InnerSea Discoveries, specializes in upscale adventure cruises and destination eco-tourism. In November of 2011, the company experienced significant resistance when it attempted to enter Kaunakakai Harbor in Molokai, Hawaii. Following his company's mission statement of sustainable tourism sensitive to local cultures, Dan Blanchard, CEO and Principle of the company, spent six years planning his company's entry to Molokai. Their previous adventure cruises to places like Alaska, the Sea of Cortez, and parts of the Pacific Northwest had been well received by the local communities, but the reception his company received from Molokai sent a clear message that they were not welcomed.

The case describes an actual situation faced by American Safari Cruises. It asks students to consider different approaches the Dan Blanchard could use to assuage the concerns of Molokai residents. Ultimately, the decision must be made whether to continue operations to abort efforts to visit Molokai.

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**ASAP-TRANSLATION.COM**

Ľudmila Mitková and Paulína Stachová (student authors)  
Comenius University

Joan Winn (faculty supervisor)  
University of Denver

This case study is about a translation agency operating in the Slovak Republic. Founded in 2005 by Katka and her husband Jakub Absolon, ASAP-translation.com offers translations from different languages (over 68 language combinations), and also a wide range of additional services (e.g. language consulting, graphic services, courses in translation software). The company has customers not only in Slovakia but also in the Czech Republic and other neighboring countries.

Since the Slovak Republic's economic and political transition (from the Velvet Revolution in 1989 to its independence from the Czech Republic in 1993) from a planned economy to a market economy, small businesses have contributed to significant economic and social changes in the country. Further changes also came with the entry of Slovakia into the European Union in May 2004. Because the country is small, bordering Austria, Hungary, Poland, Ukraine and Czech Republic, language translation is a recognized necessity for conducting business, especially for businesses that engage in international trade. Katka started offering translation services as a freelance translator, and as demand grew, she and her husband decided to make the business a full-time endeavor, with an office and regular staff. Despite the presence of large firms—primarily subsidiaries of large, well-known companies—and increasing competition from abroad, ASAP has succeeded in maintaining quality services, emphasizing values and harmony. As the technology changes and competition increases, Katka and Jakub must reevaluate their business strategy, and reaffirm their goals and values.

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## **BIOPHARMA: WORK-LIFE BALANCE**

Martha Wilson and Maureen Lojo  
California State University, Sacramento

BioPharma is a biotechnology company that is wrestling with making changes that will impact both cost and company culture. Their current staffing schedule in manufacturing was developed during the start-up phase of the facility before they reached full production capacity. During the start-up phase there was overlap between the different shifts (day, swing, and graveyard) in order to facilitate communication and address production issues. That was more than 10 years ago. The facility now runs at full production and the overlap is no longer necessary or desirable. There is idle time among the staff and the schedule is no longer efficient for current production.

The company has promoted and embraced a culture of “work-life balance” and the manufacturing manager, Mike Irwin, is appropriately concerned that changes to the production schedule will challenge this culture. Nevertheless, the manager is concerned about costs and meeting future production schedules. As a result, he has created 3 alternative schedules for consideration. Before making a recommendation Mike Irwin surveyed the employees to obtain feedback about the proposed schedules and to identify the factors that are most important to them in maintaining a work-life balance.

Coupled with the cost analysis of proposed schedules, Mike will use employee feedback from the survey to recommend the best course of action.

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## **COPPER KING MINING COMPANY**

Richard Parsons  
Westminster College

This case tells the story of an asset with incredible promise, in which both big banks and private individuals were willing to invest. Yet the company struggled to obtain the necessary financing to develop the asset and achieve a return. The atypical requirements of the owner and the 2008 financial crisis made the financing arrangements very difficult. A wide variety of financing approaches were tried one at a time over a several year period during which a significant amount of funds were raised. The financing options employed allow a legal and logical study of the technical financing requirements of each of the options. The various financing options developed are explored with some detail and highlight the management decisions made as well as their results.

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## **FEEL THE MARKET WITH TEN SENSES: MADE IN SLOVAKIA FAIR TRADE COFFEE**

Magdaléna Tvarozková (student author)

Comenius University

Joan Winn (faculty supervisor)

University of Denver

The case deals with the challenges faced by a family whose main mission is to support small disadvantaged producers from developing countries. Ten Senses was started in Bratislava, Slovakia, by Canadian missionary, businessman and philanthropist Allan Bussard to promote social and environmental sustainability. Originally, the company served as an importer and retailer of crafts and fair trade items in Bratislava's tourist center, but this venture was not financially feasible. In 2010, Ten Senses closed its retail store and started importing and selling fair trade products online to European and American consumers. As an adult, Allan's son James is committed to his family's values but he also wants to carve his own place in the world for himself and his wife and children. James considers himself a coffee connoisseur and carefully selects and roasts Ten Senses' own brand of coffee. However, this new endeavor presents a marketing challenge: how to find customers for Ten Senses' Fair Trade products in an increasingly crowded marketplace. Is it possible to combine religious and social values with financial goals?

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## **GATEWAYS HOSPITAL AND MENTAL HEALTH CENTER: EFFECTS OF INADEQUATE NURSE STAFFING RATIOS**

Eunice Akinrele, Natalie Asatrian, Sevak Hakopyan, Fay Ho, Paul Kangethe (student authors), and Stephen McGuire (faculty supervisor)  
California State University, Los Angeles

Gateways Hospital and Mental Health Center, a non-profit organization, provided in-patient, residential and out-patient services to mentally ill adolescents and adults. At Gateways, there had been growing concerns regarding budget, nursing ratios, personnel job satisfaction and maintaining patient quality of care while providing safety for all patients and staff members involved. Nurse staffing was a matter of major concern at this facility because of the effects it had on patient safety and quality of care. At Gateways, nurses worked on a three shift rotation schedule. Management had difficulty meeting the staffing requirement daily for all 3 shifts. In 2008, Gateways reported total revenue was down 20% from the previous year. While Gateways is privately owned, most of its funding came from State-sponsored programs, Medicare and other third party reimbursements. Roughly 95% of patients that come through Gateways had no insurance and/or are indigent.

With Gateways' dependence on third party reimbursements for financial support, it relies heavily on State and Federal funding. This affected its adverse patient outcomes, in which potentially sensitive to nursing care are longer hospital stays, failure to rescue, harm to the patient and/or nurse or even death. Furthermore, the nationwide nursing shortage, which is particularly acute for substance abuse and mental health facilities, had created a premium on qualified nurses and caused labor and recruiting costs to continue to rise.

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## **HOW WAS THE FAMILY BUSINESS' BOOKKEEPER ABLE TO USE BUSINESS FUNDS FOR HER FAMILY INSTEAD OF HER EMPLOYER'S FAMILY BUSINESS?**

Denise Guithues Amrhein, Saint Louis University

Conner Construction Company was a family business founded in 1914 that faced the betrayal of trusted employee when their company bookkeeper embezzled close to \$380,000 from the business over a period of almost 4 years. The bookkeeper fraudulently wrote 144 bogus checks on the business bank account to cover her personal expenses. She ultimately pleaded guilty to bank fraud and tax evasion.

This case describes how the bookkeeper defrauded her employer and explores what the business could have done differently to detect this fraud earlier or prevent the fraud altogether. This case also examines why internal controls are important to all businesses.

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## **LINKEDIN: MOTIVATING MILLIONAIRES**

Scott Bryant and Bill Brown  
Montana State University

LinkedIn CEO Jeff Weiner faced a problem. His Mountain View, CA company was estimated to be worth \$8.4 billion, a surprising 547 times the company's earnings in 2010. LinkedIn was one of the fastest growing companies in Silicon Valley—headcount has quadrupled to 1500 employees in the last two years. 100 million members regularly used the website with the world's largest database of resumes. Many employees who joined the company before it went public in 2011 are now millionaires—though they were committed to LinkedIn until November, 2011 when their shares were cashed out. Weiner knew this will likely result in significant turnover of his core of software engineers. The problem he faces is now to keep the quality employees he already has. He also needs to figure out to motivate his now much richer employees.

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## **MILLENNIUM: THE TAKEDA ONCOLOGY COMPANY**

David Kim, Chay Zhou, Brian Lopez, Glenda Franco, Rouzbeh Forouzanfar, Woosa V (student authors), and Stephen McGuire (faculty supervisor)  
California State University, Los Angeles

Millennium Pharmaceuticals was a biopharmaceutical company founded as a genomics-based startup in 1993 (Millennium Pharmaceuticals, 2011). Since then, Millennium entered into more than 20 major partnerships that encompassed in and out licensing, co-development, collaborative research, and co-promotion agreements. Millennium's mission was "to deliver extraordinary medicines to patients with cancer worldwide through science, innovation, and passion (Millennium: The Takeda Oncology Company, 2011)." Millennium focused only in oncology and had a pipeline of more than 15 oncology drugs that targeted a vast array of cancers.

With a proven track record in oncology development, Millennium was acquired in 2008, by Takeda Pharmaceutical Company Limited, the largest pharmaceutical company in Japan. Takeda was established in 1781 and was a research based global pharmaceutical company (2011). *In spite of a possible culture clash, Millennium was sought after by Takeda who wanted to enter the United States market.* This merge enhanced Millennium's already existing model of advancing science through alliances. The acquisition provided Millennium with an improved oncology research network, significant resources, and a global presence that would be valued throughout any collaboration (2011). The merger gave both companies the potential to increase their revenue and market share, but how could Takeda and Millennium make this acquisition work, given the potential clash of cultures?

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## **JOE PATERNO AND THE PENNSYLVANIA STATE UNIVERSITY SEX SCANDAL**

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On Sunday, January 22, 2012, Joe Paterno, passed away from complications associated with lung cancer. Less than three months prior, he was the head coach of one of the most successful college football teams in America. More than a coach, Paterno had been a revered teacher, a man who not only won football games, but also set a standard of ethics - "Success with Honor," as he termed it - that was held up as an exemplar of how college sports programs could have such a markedly positive role in shaping the lives of athletes. Paterno was the face of Penn State for 45 years, and during that unprecedented tenure he became the winningest coach in college football history. His death should have marked the sad end of a legendary life and career, but instead it served as the ignominious conclusion to a previously unimaginable fall from grace.

The case describes Paterno's history at Pennsylvania State University, his work to build the Penn State football program into a national powerhouse, how he instilled the program with a strong sense of ethics, and how his reaction to a shocking sex scandal involving one of his former assistant coaches, Jerry Sandusky, struck at the very foundation of his legacy and the program he had worked so hard to build. What was so wrong with Paterno's response to the Sandusky scandal that it would do such irreparable harm to not only his legacy, but the reputation of Penn State University itself? What could he have done differently?

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## **THE PORTABLE SOLAR OVEN AND THE CHALLENGES OF ECOPRENEURISM IN ARGENTINA**

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Disidel Design, a small industrial design studio in Buenos Aires, Argentina, has experienced limited success and expansion since the company was founded in 2005. Focusing on Eco Design principles, Disidel has maintained an eclectic design mix pertaining to product development in children's toys, medicine, and cleaning products.

Challenged by a struggling Argentine economy, a population not focused on environmental concerns, and a general lack of capital availability, the founders of Disidel chose to design, develop, market and sell a portable solar oven. The oven was originally designed by two of the founders while studying engineering at university.

While innovative and award winning in design, Disidel's solar oven has proven to be a challenge to the founders' success both in getting their product to market and fulfilling the mission of the studio.

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## **PRINCE GEORGE PUBLIC LIBRARY CASE: FEE-BASED SERVICES PROJECT**

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In April 2008, Allan Wilson, Chief Librarian of the Prince George Public Library met with accounting students from the College of New Caledonia (CNC) to discuss the findings of their community service learning project. For the past three months, the students investigated the viability of the library offering a fee-based service. The student project was response to a previous library community needs study of the City of Prince George which suggested some interest among the business community for enhanced library services.

If such a venture was implemented, library staff would provide research and information management services to organizations across northern British Columbia. Such a department would diversify the revenue base of the public library and offer a needed research capacity to organizations throughout the region.

After reading their report, the Chief Librarian made his recommendations to the library's Board of Trustees, whether the fee-based research and information services venture was an opportunity worth exploring further.

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## **SHATTERED GLASS — CASE A & B: A CASE STUDY IN VALUES AND ETHICS**

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This film tells the true story of fraudulent Washington, D.C. journalist Stephen Glass (Christensen), who rose to meteoric heights as a young writer in his early 20s, becoming a staff writer and associate editor at *The New Republic* for three years (1995-1998), where at least 27 of his 41 published stories were either partially or completely fabricated. Looking for a short cut to fame, Glass concocted sources, quotes and even entire stories, but his deception did not go unnoticed forever, and eventually, his world came crumbling down. This story demonstrates how one of the most respected political magazines, *The New Republic*—nicknamed “the in-flight magazine of Air Force One”—fell from grace in the world of journalism, and how one individual, Chuck Lane, showed great ethical and moral courage in confronting this issue and redeeming the publication.

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## **SILVER HILL HOSPITAL: INPATIENT & TRANSITIONAL PROGRAMS**

Felicia Muniz-Caster (student author) and Barrington Hunt (faculty supervisor)  
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“We encourage the strategic and efficient utilization of all resources. Using clinical judgment and good management practices, we demonstrate a commitment to responsible financial stewardship,” was illustrated on Silver Hill Hospital’s website, a nationally recognized, independent, not-for-profit psychiatric hospital. Since 1931, Silver Hill Hospital had specializes in providing the best available treatment of psychiatric illnesses and substance abuse disorders.

The hospital provided adult and adolescent patients with both Inpatient Care and Transitional Living Programs. These divisions of services created two major opposing entities within a single hospital. The facility collected revenue from third-party payers, like insurance companies, and directly from patients via out-of-pocket expenses. Traditionally, most insurance carriers predominantly cover Inpatient Care but Transitional Living Programs were typically considered ‘non-covered services’ and patients requiring these facilities pursue other means to cover the bill.

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## **SOCIAL MEDIA AND ITS' EFFECT ON PATIENT PRIVACY**

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In health care, advances in technology are vital to the success of an organization. In recent years, the development of social media has proven to be an asset in the health care field; however, social media can also be a detriment.

HIPAA and patient privacy violations have always been a concern in health care and with the progression of the internet; patient privacy over the web has become a valid concern for employers and staff. Over the past few years, there have been many well publicized cases involving HIPAA violations; these violations occurred in comments on sites such as Twitter and Facebook. Although many of comments did not include patients' names, there was still enough information that many could put two and two together and figure out who the violator was discussing. Unfortunately, after having to deal with breaches in patient privacy, many health care organizations have had to develop social media policies and training.

This case will examine the positive and negative effects of social media in healthcare; moreover, this paper will discuss how social media can directly affect patient privacy and the violation of HIPAA laws and quite possibly cost health care organizations millions of dollars in violations and fines. This paper concludes that stricter policies, procedures, training, and disciplinary actions will lead to a decrease in violations.

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## **SOCIAL RESPONSIBILITY OR INSANITY: THE ENTREPRENEURIAL STRUGGLE TO BUILD UTAH'S FIRST WIND PROJECT**

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Utah's first commercial wind project was an 18.9 megawatt (MW) plant comprised of nine turbines built within five miles from the center of the small urban community of Spanish Fork located 12 miles southeast of Provo, Utah. It was pioneered by Tracy Livingston, founder of Wasatch Wind, and Christine Watson-Mikell, his engineering assistant. Livingston established Wasatch Wind in 2002 with the proceeds from the sale of his previous entrepreneurial venture, a medical equipment manufacturing company. Buoyed by his financial success, Livingston wanted to find a way he could give back to society and believed that the social value of wind (e.g., energy security, clean air, rural economic development, job creation) provided such an opportunity. The development effort for the project was long extending over a four-year period from 2004 to 2008 and highly contentious. Livingston had to single-handedly address a number of value conflicts with respect market, policy, financial, and community issues to build the wind project.

The case outlines the major milestones in the development effort of the wind project highlighting the personal, moral, and ethical values conflicts they represented, as recounted by Livingston in two video-taped interviews. Livingston's first interview was conducted in October 2007, just prior to the groundbreaking of the project, and many of the struggles of the approval process were fresh in his mind. His second interview was done in August 2009, after completion of the wind project, and Livingston had had time to reflect on his arduous journey. He provided a candid account of his experience from the height of his "entrepreneurial enthusiasm" in wind development to the "deepest, darkest hour of his life" when it looked as if his project was going to be "denied" by local residents protesting the project, and finally to the realization of his "dream" of wind turbines producing power on the Utah landscape.

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## **TO TEA OR NOT TO TEA: THE FUTURE OF RISTON**

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Riston Tea was established in Moscow, Russia, in 1989 as an importer of tea from Sri Lanka. By 2011, the company was a vertically integrated group, with activities that ranged from tea purchasing to blending and processing, to packaging, sales, and distribution throughout the Russian Federation, where it was the fifth largest tea company with 3.6 % of the 71 billion ruble market. It also exported tea to 17 other countries in the CIS and Baltic states. In 2010, it had run a highly successful national advertising campaign, but was still much less known by consumers than were rival brands Lipton, Greenfield, and Ahmad. The Russian market in 2012 had stagnated in both ruble and volume terms, and Natalia Zhestareva, Riston Brand Manager, knew that growth would only come if Riston managed to attract customers from its rivals.

After 13 years of building the brand and the company, Nisantha Perera, the company founder and CEO, considered several options including: a dramatic rethink of how Riston sold and distributed its tea; potential focus on sales to other European and Asian markets; possible renewed marketing efforts to win customers from rival brands; and even the option of selling the brand or the entire company. Natalia was shocked to hear Mr. Perera ask her to prepare for a meeting the next day with a potential buyer.

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## **THE UPPER BIG BRANCH MINE DISASTER**

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On April 5, 2010, a massive explosion at the Upper Big Branch coal mine in West Virginia killed 29 miners and seriously injured two others. It was the worst mining disaster in the United States in almost forty years. The mine's owner, Massey Energy, had a history of safety violations and a contentious relationship with both government regulatory agencies and the United Mine Workers union. It had succeeded in breaking the union and had actively resisted attempts by regulators to cite and fine its operations for safety violations. In the wake of the disaster, four separate investigations—by the federal and state governments, the United Mine Workers union, and the company itself—examined what had gone wrong.

This case tells the story of the disaster, and challenges students to consider both the ethics of Massey's actions and the causes of the disaster. Were Massey's actions ethical? Who should bear the responsibility for the deaths of 29 men: Massey Energy, its board of directors, and its CEO Don Blankenship; federal and state regulators; policymakers; or the workers themselves? What could be done in the future to assure miners' health and safety and to lessen the chances of a similar tragedy?

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## **VODAFONE EGYPT (B) : MANAGING CORPORATE CHANGE AND ORGANIZATIONAL PERFORMANCE**

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Vodafone was the leading wireless company world-wide at the time of this case study profile. The CEO, Mr. Ian Gray, was charged with developing a culture that reflected the values of the corporation at their fast growing subsidiary in Egypt. Vodafone Egypt was a company filled with Egyptian engineering staff whose efforts to build a wireless network from scratch to global standards had been largely successful. The case describes that as the wireless business matures companies must turn their attention to customer service , marketing and business management for profits. This dictates a strategy for turning employees into a more cohesive group focused on corporate and unit values and performance metrics. All of this change must occur in the environment of a multi-national company owning and managing a mostly Egyptian workforce.

This case describes the challenges facing Ian Gray and his solutions to introduce his Value Based Organization as a management process to meet Vodafone's corporate goals for return on investment and growth. This case is meant to be used as part of three distinct cases over ten years of time as Vodafone Egypt grew from the initial investment to the current situation.

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## **THE WAL-MART STORES, INC.: AN AMERICAN DREAM THAT TOUCHED THE WORLD**

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Wal-Mart has weathered well the economic storms of the past decade, taking no financial losses. In 2011, although Wal-Mart sustained growth, it did so only through the opening of additional stores across the United States and other countries. Further, while companywide sales were strong, the U.S. operating income was sluggish with a mere 3.1% growth versus a 5.5% growth the previous year. Looking for additional growth opportunities, Wal-Mart planned to open convenience stores (c-stores) in a number of markets including urban and rural markets both in the U.S. and in its international segments.

Thus, as the best positioned retailer in the world, Wal-Mart's strategic plan, and business model is based on a productivity loop of low prices and low operating costs, which will retain its competitive advantage and continue as the low price leader. It was deemed a powerhouse in and of itself. As the #1 retailer in the world, the company employed 21.1 million associates in more than 8,970 stores. Wal-Mart's international division, which comprised 26% of its sales, experienced a fast growth pace. Wal-Mart readily surpassed Europe's Carrefour, Metro AG and Tesco combined. It was the #1 retailer in Canada and Mexico and also operated in Asia (owning 95% of the Japanese retailer SEIYU), Africa, Europe and South America. Although Wal-Mart easily sustained its position as the #1 retailer in the world, the state of its competition deserves analysis.

Nevertheless, the question remains – can Wal-Mart continue to implement strategic plans while sustaining dividends and profits. The short-term answer is yes given that Sam Walton vision for retaining low prices and giving back to the community continues to this day. However, the long-term answer is yet to be determined.

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## **ZMD AND ZIGBEE: MANAGING KNOWLEDGE IN STANDARDIZATION**

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ZMD is a custom integrated circuit (IC) design and manufacturing company headquartered in Dresden, Germany. Focused on automotive and industrial products, ZMD management saw an opportunity to complement their product offering by pursuing wireless IC products, specifically transceiver designs in an emerging technology called ZigBee™. ZigBee is a global wireless standard aimed at the connectivity of things. In particular, ZigBee is designed to be used in building monitoring and control devices, smart energy technology, and health and fitness applications. ZigBee relies on a wireless technology originally defined and standardized in a working group of IEEE (Institute of Electrical and Electronic Engineers), a worldwide professional association of over 375,000 members aimed at the standardization and advancement of technology.

This case describes a dilemma of Kory Brown, a senior executive of ZMD who has the possibility of being first-to-market in an emerging technology, but is faced with mounting problems in the development and delivery of products defined by the IEEE standard, 802.15.4. While Brown's original firm and a partner were involved in the early definition of the standard, a series of events led to a multiple year hiatus from active participation in defining the standard. Product design work, however, continued relying on published preliminary specifications and any other information that the engineers could glean. Brown's lead engineer questions the lack of participation while Brown weighs risks and rewards of late-stage participation, especially considering IEEE working groups often consist of competitors sharing valuable knowledge with each other. Questions explored in this case include how a firm can create competitive advantage using inter-firm knowledge creation, free-riding opportunities and threats, tacit knowledge management in industry consortia, and in general, why a firm should or should not actively participate in such consortia.

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