

**PROCEEDINGS
of the
WESTERN CASEWRITERS
ASSOCIATION
2016 CONFERENCE**

The Hilton Portland & Executive Tower



**Portland, Oregon, USA
March 10, 2016**

Edited by Michael E. Valdez, Ph.D.
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WESTERN CASEWRITERS ASSOCIATION

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

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

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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:

Sally Baack

Jyoti Bachani

Issam Ghazzawi

Leslie Goldgehn

Duane Helleloid

Anne Lawrence

Teresa Martinelli-Lee

Steve McGuire

Joshua Mindel

Bruce Robertson

Keith Sakuda

V. Seshan

Jeff Shay

James Spee

Teri Tompkins

George Whaley

Joan Winn

WELCOME TO THE CONFERENCE

Welcome to Portland and to the 2016 Western Casewriters Association (WCA) Conference. The WCA was founded with the mission to help train, develop, and support casewriters. This year we seek to continue this mission with our roundtable format designed to provide specific feedback on your case and instructor's manual. Our hope is that many chose to pursue the goal of publishing your work in peer-reviewed journals.

The WCA believes in fostering a supportive environment and promoting mentoring between case writers. We encourage our more experienced members to share their insights and ideas with new case writers to continue the development of our field. Andrew Fergus will open our morning session with an introduction to roundtable sessions and proper roundtable etiquette. We will then break into our roundtable discussion groups to discuss our cases and instructor's manuals. Following the review of three cases, John Laurence, Editor of Case Research Journal, will then present our keynote address on *"From Desk Rejection to Best Selling Case: The Subtle Differences that Matter?"*

After the keynote, we will have lunch with the participants of the Western Academy of Management. After lunch, we will break into our final case and instructor's manual discussion. All case writers should use the roundtable sessions to solicit constructive feedback for improving their cases.

The WCA Business Meeting will take place following the last roundtable discussion. All participants are strongly encouraged to attend. The business Meeting and Reports will be chaired by Michael Valdez (2016 Program Chair) and Teresa Martinelli-Lee (Treasurer). In addition, an update on Journal of Case Research and Inquiry will be provided. We will conclude the conference with reflections on the day as well as with a presentation of rewards which will include awards for best WCA case and best WCA mentored case.

The conference will conclude in time to join the opening session for Western Academy of Management (WAM) conference located in the Plaza Foyer whereby all WCA attendees are invited to participate. The opening session will be preceded by the WAM Fireside Chat in the Pavilion Ballroom East.

We hope you find the conference rewarding.

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WCA REVIEWERS

Western Casewriters Association 2016 Conference Portland, Oregon

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

Stefanie Beninger	Simon Frazier University
Robert Ellis	University of Lethbridge
Andrew Fergus	Thompson Rivers University
Elaine Labach	Fort Lewis College
John Lawrence	University of Idaho
Susan Marcus	Marylhurst University
Charla Matwick Nichols	Portland State University
Karen Robson	Simon Frazier University
Lorraine Taylor	Fort Lewis College
Michael Valdez	Fort Lewis College
Deb Walker	Fort Lewis College

WESTERN CASEWRITERS ASSOCIATION AWARDS PROCESS



Two awards will be given at the Conference. Reviewers reviewed cases as well as nominated cases for best papers.

The first award is for “**BEST CASE**” in the proceedings, for which all submissions are considered, and the second award the “**BEST MENTORED CASE**” for the best case by a student author(s) and faculty mentor.

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

**Western Casewriters Association Conference
March 10, 2016
Portland, Oregon**

Program Schedule

Time	Location	Agenda
7:00 to 8:00 am	Pavilion West	WCA/WAM Breakfast
8:00 to 8:45 am	Broadway I	Welcome (Michael Valdez) Roundtable Etiquette & Feedback Process (Andrew Fergus)
8:45 to 9:30 am	Broadway I	Roundtable Discussions of Cases (1)
9:30 to 10:15 am	Broadway I	Roundtable Discussions of Cases (2)
10:15 to 10:30 am	Outside Broadway I	Refreshment Break with WAM
10:30 to 11:15 am	Broadway I	Roundtable Discussions of Cases (3)
11:15 am to 12:00 pm	Broadway I	Keynote Speaker: John Lawrence, Ph.D. A.D. Davis Professor of Business Editor, Case Research Journal College of Business & Economics University of Idaho <i>"From Desk Rejection to Best Selling Case: The Subtle Differences that Matter?"</i>
12:00 to 1:00 pm	Outside Broadway I	WCA/WAM Lunch
1:00 to 1:45 pm	Broadway I	Roundtable Discussions of Cases (4)
1:45 to 2:30 pm	Broadway I	Business Meetings & Reports - Treasurer's Report - Treasurer and Co-Chair Assignments - Discuss future of Journal of Case Research and Inquiry
2:30 to 2:45 pm	Outside Broadway I	Refreshment Break with WAM
2:45 to 3:30 pm	Broadway I	Award Presentations - Best WCA Case and Mentored Case - Reflections & Survey Feedback
3:30 to 4:30 pm	BREAK	
4:30 to 6:00 pm	Pavilion Ballroom East	WAM Fireside Chat
6:00 to 7:30 pm	Plaza Foyer	WAM Opening Reception

**Western Casewriters Association Conference
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Table Assignments

Table	Lead	Authors	Case
1	Robert Ellis	Kenneth Smith (M)	Facing Financial Reality: A Local Government Multi-Actor Model
		Duncan M. Pelly (M)	Homeboy Industries
		Robert Ellis	The Wine Enterprise
		Kenman Wong	Gravity Payments - Setting the World or Itself on Fire
		Patrice Ngan Kee Ngan	Participant
2	Deb Walker	Titi Kunkel	The Nazko First Nation: Seeking Development Through Social Enterprise
		Lorraine Taylor	Marijuana Tourism
		Deb Walker	
		Yang Zhang (S)	dusitD2 Constance Hotel Pasadena
		John Lawrence	Participant
3	Teresa Marinelli	Teresa Marinelli (M)	Let's Meet: Cisco's WebEx: Unlocking the Capabilities of Online
		Karen Robson	Zajac Ranch for Children: Marketing in the Non-Profit Sector
		Karen Robson	Phillips Exeter Academy: An Education Like No Other
		Charla Mathwick	Business Model Innovation at Wildfang
		Bonnie Persons	Participant
4	Andrew Fergus	Mark Arnison	Orchid Species Preservation Foundation
		Holly Ferraro	Holding On or Letting Go? Second Generation Family Business Decision Making
		Jack Suyderhoud (M)	Opec Plastics: Growing with Vietnam
		Andrew Fergus	ASK Wellness
		Colleen Robb	Participant



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

The 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 (IM's) (aka TN teaching notes). The discussion process is rigorous yet done in a supportive manner. You should expect that the first case discussed, long or short, would take more time than those that follow. Some issues will occur in several cases; discussion need not be repeated in detail after the first time the issues arise.

PREPARING FOR CASE ANALYZES & FEEDBACK

The focus should be on major as well as subtle ways to improve cases, not on proofreading details of grammar, spelling, etc. To give helpful feedback, you may (1) mark up the cases and IM | TN, 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? Do the IM | TN address these?
- ✓ Can the IM | TN 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 timekeeper, or assign one.

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

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



How to Get the Most Out of the Roundtable Case Discussion Sessions

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

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

AFTER THE WCA CONFERENCE

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

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

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

PUBLISHING YOUR CASE RESEARCH

Western Casewriters Association

As it has 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 is what you want and that is 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 “Case Publishing Outlets” through the link on our website, www.westerncasewriters.org.

CALL FOR CASES AND PAPERS

Journal of Case Research and Inquiry WCA

The Western Casewriters Association is proud to announce the launch of a new journal, the *Journal of Case Research and Inquiry* (JCRI) in 2012.

The *Journal of Case Research and Inquiry* seeks submissions of teaching case studies, notes, and articles related to case research and teaching with cases. All submissions to JCRI will be double blind peer-reviewed by at least two reviewers. Published cases, notes, and articles will be available full-text online and free of charge for instructors and students.

Cases. The journal seeks cases that address significant contemporary issues faced by organizations and managers in the areas of business and public administration, nonprofit management, and social entrepreneurship. All cases must be submitted together with instructor manuals (IMs). Cases may be derived from primary field research, secondary research, or a combination of both. JCRI does not accept fictional cases, nor cases, notes, or articles previously published elsewhere. We seek cases that will grab students' attention. Cases employing multimedia methods and links to web resources are especially welcome.

Notes and Articles. Pedagogical notes that accompany a given case may be submitted to the journal; notes may be summaries of industry characteristics and trends, or theoretical or legal analyses that complement a case. JCRI also seeks scholarly articles addressing significant issues related to case research, case writing, and teaching with cases.

Submissions. Authors of cases, articles, and notes should adhere to the submission guidelines posted on the journal website www.jcri.org. Submissions and inquiries may be made to the editor at editor@jcri.org. Information about the Western Casewriters Association can be found at www.westerncasewriters.org

CALL FOR CASES

Case Research Journal

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.

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CALL FOR CASES

The CASE Journal

The CASE Journal invites submissions of cases designed for classroom use. Cases from all business disciplines will be considered. Cases must be factual, and releases must be available where necessary. All cases must be accompanied by an instructors' manual that identifies the intended course, relevant theoretical concepts or models that can be applied, and the research methodology for the case. The instructors' manual should also contain discussion questions and suggested responses, and a teaching plan if not inherent in the Q&A.

The CASE Journal also invites submissions of articles relating to case teaching, writing, reviewing, and two new sections have been introduced: Industry Notes and Critical Incidents.

All cases and articles will be subject to a double blind review process. Our review process is developmental, and reviewers will offer suggestions for improvement and revision, where appropriate.

All manuscripts submitted are to be original, unpublished and not under consideration by any other publishing source. To ensure the blind review, there should be no author-identifying information in the text or references. This journal will only accept on-line submissions. Submit your manuscript to the editor by e-mail attachment in MS-Word (doc format). A separate title page must accompany the paper and include the title of the paper and all pertinent author information (i.e. name, affiliation, address, telephone number, FAX number, and E-mail address). If any portion of the manuscript has been presented in other forms (conferences, workshops, speeches, etc.), it should be so noted on the title page. There is no submission fee; however, at least one author of cases/articles accepted for publication must be a member of The CASE Association.

Cases and articles that have been published in The CASE Journal are distributed through Primis and ECCH. Abstracts are available on our website: www.caseweb.org

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**WESTERN CASEWRITERS
ASSOCIATION**

CASE SYNOPSES

OF ALL ACCEPTED CASES

2016 WCA CONFERENCE

PORTLAND, OREGON

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

ASK Wellness

Andrew Fergus, Thompson Rivers University, afergus@tru.ca

Tony Bell, Thompson Rivers University, tbell@tru.ca

Bob Hughes the Executive Director of ASK Wellness was thinking about the upcoming Board of Directors meeting. It had been two years since the last strategic plan, and it was time for him to present the plan for developing the next plan. The last strategic plan had been a great success and the very involved process, while taking time, had been a very worthwhile process for the organization to go through. His challenge was to come up with a plan that would provide the next strategic plan, at present he didn't know what that would look like but he did know that a major focus would be on ensuring that the organization remain relevant in the future.

This case explores the strategic planning process at a non-for-profit organization.

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 10, 2016, Portland, Oregon. All rights are reserved to the author(s).

AKB Safe, Inc. Death, Embezzlement, and Lost Sales

Charla Mathwick, Portland State University, charlam@sba.pdx.edu

Co-founders Emma McIlroy and Julia Parsley were two and a half years into the creation of their tomboy retail brand—Wildfang—launched online in 2013 using public relations and social media content to attract over 120,000 Wildfang community members. Wildfang’s online retail presence which is described as ‘the home of tomboy style and culture,’ is complemented by a destination brick and mortar location on Portland’s East Side –dubbed the Wildfang Fort—which also serves as corporate headquarters. The team readied for proof of concept of their second physical location in Portland – the Wildfang Outpost. The strategy was to form partnerships with complementary consumer brands that align with Wildfang’s brand values and would appeal to the Wildfang girl. They are considering a combination of national and local brands to deliver an authentic tomboy experience in-store. The team aimed to create a localized tomboy experience that would anchor the national expansion of their brick and mortar presence, as well as drive traffic online. The handshake between Wildfang’s offline and online retail operations were closely tracked to understand the impact channel expansion had on cost of customer acquisition, revenues, and profitability. Meanwhile, McIlroy considered changes to her retail business model to accelerate equity creation, leverage Wildfang’s core competencies, and push the organization toward profitability.

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dusitD2 Constance Hotel Pasadena

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In September 2014, a new boutique hotel with an unknown brand in the United States opened its doors in Pasadena, California, just outside of Los Angeles. Mr. Kin Hui, dsuitD2 Hotel Constance Pasadena's C.E.O., explained why the brand was chosen: "We chose the Dusit brand to offer something different to the market. Although the Dusit brand is well known in Asia, ours is the first Dusit hotel in the United States and will offer the very high standard of service different from our competitors in the area."

dusitD2 Hotel Constance Pasadena targeted 25-40 year-old customers, many of whom were millennials (born between 1982 and 1994). G.M. Anderson pointed out that "millennials don't always want to the branded experience. They want to do business where you don't talk. They want to book rooms easily on a mobile app. We have a 20th century building with 21st century technology to improve the in-room experience."

To serve its millennial customers, dusitD2 Hotel Constance Pasadena provided free Wi-Fi, a coffee machine, a smart TV, and an iPad in every hotel room. The iPad could be used for wake-up calls, requesting one's car from valet parking, arranging a taxi or Uber ride, adjusting the thermostat and lighting, and reserving a seat in the soon-to-be opened Cal-Asian restaurant, "Claude's at the Constance."

In December 2015, Hui pointed out that dusitD2 Hotel Constance Pasadena was already running at nearly 70% occupancy on weekdays and 100% occupancy on weekends, while some of supporting sections, like the swimming pool and the garden, were still in construction. It appeared that the decision to buy a Dusit franchise was sound. Was it? Would it provide Mr. Hui's hotel with a competitive advantage in the long term?

The case provides an overview of the boutique niche in the hotel industry as well as a detailed review of the franchise agreements of duisitD2 and other boutique hotel chains. It provides a brief explanation of the performance metrics used in the industry, and provides data on the performance of the hotel and some of its rivals.

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 10, 2016, Portland, Oregon. All rights are reserved to the

Facing Financial Reality: A Local Government Multi-Actor Model

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(No Case Study Synopsis Provided)

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 10, 2016, Portland, Oregon. All rights are reserved to the

Gravity Payments – Setting the World or Itself on Fire?

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In 2015 Dan Price, the founder of Gravity Payments, Inc., decided to give almost all of his employees raises—big raises. He told his employees they would all make a minimum of \$70,000 (phased in over a three year period). Some were only making \$35,000 at the time, effectively doubling their salaries. The employees were ecstatic and Price made national news for his plan. In addition, Price decided to his nearly million-dollar salary to just \$70,000 to pay for the pay increases for his employees. In addition to cutting his salary, Price will use 75 to 80 percent of the company's anticipated \$2.2 million profit per year to pay for the wage increase. Two employees quit, Price's brother (and cofounder) sued him and the decisions has been in the national news. The case raises questions about employee pay fairness, employee motivation and the impact of internal company decisions on stakeholders.

Holding On or Letting Go? Second Generation Family Business Decision Making

Holly Ferraro, Seattle University, ferraroh@seattleu.edu

The second generation of the Seo family had entered the family business. This generation made a number of changes to business operations because of major shifts in the competitive and regulatory landscapes. The case focuses on how to grow the business in the face of increasingly complex government regulations in a way that is consistent with family values. Kenneth Seo, the president, has helped professionalize the business and led the family in important innovations that grew the small beauty college into a chain of three colleges. However, as the third generation begins to grow up, he is confronted with thinking about the future of the company beyond his generation. How do he and his siblings preserve the legacy and organizational culture created by their parents and yet provide opportunities that are in line with interests of the next generation (and for that matter, the current one)? Alternatively, is it time to let go?

Homeboy Industries

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Founded by Father Boyle in 1988, Homeboy Industries, a non-profit organization, aimed to offer alternatives to gang activity and help former gang members or prisoners reenter the community. For the first few years, Father Gregory Boyle, the Jesuit priest who founded Homeboy Industries, focused on job placement for the ex-gang members (or “homies”). However, the number of the homies far outpaced the available jobs. In 1992, Homeboy started its first social enterprise, Homeboy Bakery. At the end of 2015, Homeboy businesses included: Homeboy Bakery, Homegirl Café, Catering, Food Truck, Diner at L.A. City Hall, Airport Bakery, Farmers’ Markets, Salsa and Chips, Homeboyfoods.com, Homeboy Silkscreen & Embroidery and Online Store: Homeboy Apparel & Homeboy Merchandise. Homeboy programs included: Education, Employment, Case Management, Legal Services, Mental Health, Substance Abuse Support, Tattoo Removal, Domestic Violence Intervention Program and Solar Panel Training Program. In spite of all its entrepreneurial success, Homeboy continued to face financial difficulties.

This case addresses one of the fundamental choices of economics that managers face – how to manage tradeoffs, in particular strategic tradeoffs. It will examine the difficulty of Homeboy Industries, and non-profits in general in defining a clearly coherent strategy – should a non-profit strive to provide intrinsic value for the community or remain financially viable. This duality of vision has important implications for strategy, most notably in which industries should Homeboy compete, and by extension, which entities in a diverse portfolio of strategic business units should be expanded, explored, and pruned. In this case there is a particular tug of war between brand building and licensing, which is very profitable, versus programs for Homies and members of the community, which are very costly.

These issues regarding strategy also have implications of management, in particular identity and temporal orientation of an organization. Does the main goal of Homeboy need to be to remain financially viable and successful in the long term, as the CEO Thomas Vozzo advocates, or does it need to be dedicated to a more short term vision of training members of the community today, and hence continue to count on community support, as advocated by the founder, Father Boyle.

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Let's Meet: Cisco's WebEx: Unlocking the Capabilities of Online

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The purpose of this change management case is become aware of the necessity of collaborative action between technology organizations and educational systems as a means of innovative education given the global education market. A strategic alliance between Cisco Systems' WebEx and the University of La Verne was initiated to develop illuminative structures and processes to enhance formal higher education precepts. Critical components to these dynamic included challenges of building connections across the University's 10 regional campuses; to then take faculty excellence and expertise across jurisdictional boundaries to all campus, and enable pedagogical opportunities for international students, colleagues, and administration all in real time.

The standards of this case are for student learning in relation to location to incorporate technological enhancement using powerful tools to stimulate classroom activity across digital and physical boundaries. The veracity of this case is that the stakeholders believe that to deliver high quality education, serve a large yet diverse population will require collaborative technology so that students can access the efficacy of faculty knowledge, impart that knowledge regardless of location, and again do so in real time.

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 10, 2016, Portland, Oregon. All rights are reserved to the

Marijuana Tourism

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“What a great entrepreneurial opportunity,” John Mace thought. Now that recreational marijuana was legal in Colorado, and several local distributors had opened for business, John thought that he could take advantage of this new market by offering tours to bring visitors to a local growing facility and recreational shop. His “cannabis tour” would be a great addition to the local tourism industry. The local recreation opportunities and the surrounding mountain scenery were wonderful attributes. However, in addition to these attractions, many residents considered the city’s best attribute to be its family oriented atmosphere.

This case considers the real world challenges that John encounters by being associated with a product that, although legal in the state of Colorado, was still considered illegal by Federal standards and has a stigma of being anti-family, dangerous and not something that a wholesome vacation would include. Students are tasked with decision making related to the new industry of marijuana tourism and the resistance John encountered when he tried to break into the local tourist market.

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Opec Plastics: Growing with Vietnam

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At the end of 2013, the leadership of Opec Plastics was pleased with what they had been able to achieve in their four years of existence. They had grown the company to nearly \$200 million in revenues in just four years, and they had goals to double that in two more years. However, they were uncertain on how to accomplish this. They had technical expertise in manufacturing plastic bags and related products and trading the raw materials (resins) from which the products were made. Even so, they regarded their core competencies in a more general way: strong relations with people who mattered, in the supply chain, in the regulatory environment, and in financing. The growth options included:

- Expansion within existing business lines through scale increases.
- Scope expansion to products and services near to their existing activities.
- More distant scope expansion to products and services that were not near to their existing activities but still presented opportunities.

Layered on these issues was the external environment. The prospects for Southeast Asian trade agreements and the Trans Pacific Partnership created new opportunities along the value chain. In addition, the vagaries of oil markets threatened additional uncertainties.

¹ Opec Plastics is the actual name of the company. The company is not related to OPEC, the multi-national oil cartel.

Orchid Species Preservation Foundation

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The Orchid Species Preservation Foundation (OSPF) was a not-for-profit organization in Edmonton, Alberta, Canada dedicated to the preservation of rare orchid species. The OSPF had 4,500 orchids housed in a greenhouse facility at the Muttart Conservatory, which was owned and managed by the City of Edmonton. In the fall of 2014 the Muttart Conservatory management had decided that the orchid collection should be downsized, which sparked the OSPF board to consider alternative futures for the foundation.

The OSPF Board members had created an ambitious multi-phase plan to build their own facility to grow and display the rare orchids. Dave Nixon, the President & chair of the volunteer OSPF board, had determined that the new facility would require the foundation to increase their yearly revenue by ten times. He worked with the board members to develop a list of strategies targeting revenue generation. The list included a diverse range of items spanning preservation, commercialization, education and entertainment. However, the options were not yet well defined and could take the organization in many different directions. The board needed to find a stronger strategic focus and choose a clear direction in order to have the impact that the members were hoping for.

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Phillips Exeter Academy: An Education Like No Other

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When the principal of a renowned boarding school in the United States announced his retirement, Phillips Exeter Academy was at a crossroads. This case explores a college preparatory school, steeped in tradition as an all-boys feeder school for Harvard in the 1700's which, in 2013, attempted to position itself as a modern, progressive, co-ed and all-inclusive institution – where the brightest students in the world, regardless of wealth, race, religion, or any other factor, could come to receive a world class education. Phillips Exeter Academy had come a long way from its inception in 1781 by John Phillips: from the adoption of the world-class Harkness teaching system in 1930, to going co-educational in 1970, to initiating full tuition assistance to qualifying students in 1998, the Academy had achieved many milestones. Despite all this, the school had a yearly tuition price tag of over \$45,000 per boarding student, was facing competition, and, despite claiming to be inclusive, was often thought of as a school for rich kids. This case explores the brand community of Phillips Exeter Academy and its unique positioning as elite yet exclusive.

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The Nazko First Nation: Seeking Development Through Social Enterprise

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Chief Delores Alec had not slept much the night before, nevertheless that had not diminished her sense of optimism and excitement as the first rays of the morning sun broke over the rolling hills and grasslands of the Nazko First Nation in the Cariboo Region of central British Columbia. Yesterday the provincial government had agreed to an Incremental Treaty Agreement as another step forward in a comprehensive land and cash settlement with the Nazko First Nation after 18 years of negotiations. A Final Treaty would mark a turning point in the history of the Nazko people: After 200 hundred years of conflict and control by the government, the Nazko would have the opportunity to control their own destiny. What path will we choose for social and economic progress for our people thought Chief Alec?

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The Wine Enterprise

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Michael was attempting to recover money on behalf of one of his clients, a small grape-grower in California who was owed a debt by a financially-troubled winery. Michael arrived at a meeting of owners and creditors only to discover that the winery had filed for Chapter 11 bankruptcy earlier that morning and any remaining assets were soon going to be tied up in the courts. Michael's client had delivered his grapes to the winery based on trust and a handshake, and could ill-afford to take this loss.

The meeting had resolved little because there was simply no money left for Michael's client or for the other creditors. Fearing he was going to leave the meeting empty-handed, Michael offered to cancel the debt in exchange for the wine in the vats and bottling services. The owners and other creditors accepted his offer. The challenge facing Michael and Bonnie was to determine how they were going to sell this wine for their client.

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Zajac Ranch for Children: Marketing in the Non-Profit Sector

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This case explores marketing in the non-profit sector. Mel and Carmen Zajac had an ambitious vision when they conceived of the Zajac Ranch: a place where children with all types of serious and chronic illnesses and disabilities could come and simply be children at summer camp. With fully wheelchair accessible facilities, including a pool and spa, outdoor hikes, and recreation area, Zajac Ranch had been successful in creating this vision. Moving forward, Mel and Carmen wanted to establish a legacy – a place that was self-sustaining and that could provide an accessible physical and mental wellness retreat for children for many years to come. Given the tough economic times, how would Zajac Ranch ensure its future?

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