



Proceedings
of the
Southeast Case Research Association
Sixteenth Annual Meeting
February 14-16, 2008



Editors

Michael J. "Mick" Fekula, University of South Carolina Aiken
Rebecca J. Oatsvall, Meredith College



Ocean Reef Resort
Myrtle Beach, South Carolina

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Southeast Case Research Association

SECRA was formed in 1991 as an affiliate of the North American Case Research Association. Its stated purpose is to:

- Continually develop the case method of research, teaching, and application toward functional and strategic level administrative issues;
- Develop interdisciplinary case and teaching note writing skills as defined by the American Assembly of Collegiate Schools of Business;
- Advance individual analytical and reasoning skills;
- Provide necessary forums for the interchange of expertise among those who train and develop policy-making professionals; and,
- Continually promote the active exchange of information between case authors and interdisciplinary professionals in both public and private sectors.

Membership is open to academics, researchers, professionals, and others who share a commitment to improve the case method of teaching, research, and publication.

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Entrepreneurship, Small Business	Tim Redmer	Regent University
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Strategy, OT	Chris Cassidy	Marshall University
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From the Proceedings Editors

Dear SECRA Colleagues:

We are happy to report that the Sixteenth Annual SECRA Meeting Proceedings once again show that SECRA continues to grow. We have almost 30% more cases than last year. Similar to other years, many submissions fell into a few of our published tracks. Thus, we saw little utility in organizing the contents of these proceedings by track. Instead, we offer a case and topic matrix to indicate the various areas represented in each case. Because we had to make some judgment calls, we apologize if you feel that your case was omitted from an essential category or inappropriately included in another. Our goal is to solicit this type of assessment from authors during the call for cases to accurately determine the nature of each case.

Next, the contents are listed alphabetically by author. This quickly gives you the credit due for your hard work in delivering a case to the SECRA meeting. The proceedings are also supported by an author index.

There is a CD included with each copy of the proceedings. This CD contains electronic versions of the program, the proceedings you are holding, and copies of all full cases that were submitted in time for the CD publication deadline. The CD precludes the cost of printing full cases in the proceedings, yet still allows us to have a hard copy of the case abstracts for quick reference. A future goal is to provide more advanced indices for greater search capabilities. Please note that there are currently no guidelines for full case submission to the CD, so the cases are unedited and formats will vary.

If you find the proceedings helpful, then the credit goes to you, the authors who have taken the time to make contributions to this year's proceedings. This document would not exist without your efforts.

Congratulations to Greg Stone & Tim Redmer!

We're also happy to report that as a result of Fred David's Plenary Speaker presentation last year in which he invited case submissions, SECRA Members Greg Stone and Tim Redmer will have a case published in the 12th edition of *Strategic Management: Concepts and Cases*, by Fred David. The textbook is scheduled for release on March 31, 2008. Greg and Tim encourage other SECRA members to submit their cases to Fred David, as well as the SECRA Journal for future publication consideration.

Thank you for the opportunity to serve.

Sincerely,

Mick Fekula & Becky Oatsvall, SECRA Proceedings Editors—2008

**Charter Members of the
Southeast Case Research Association**

<i>Chi Anyansi-Archibong</i>	<i>North Carolina A&T State University</i>
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~ *PRELIMINARY CALL* ~
FOR CASES, PAPERS, SYMPOSIA
Southeast Case Research Association 17th Annual Meeting
Myrtle Beach, South Carolina February 12-14, 2009

The 2009 program organizers of the Southeast Case Research Association (SECRA) invite new and experienced case writers to submit original, unpublished cases, articles relating to the writing or application of case studies, case study embryos, or proposals for symposia to be presented at the Sixteenth Annual SECRA Conference.

Submission Due Date: November 17, 2008

SECRA serves as a channel for the development and publication of case studies in all areas of business, education, social issues, technology, healthcare and other disciplines. Cases with instructor's manual, papers, and proposals for symposia on topics dealing with the case method of learning and teaching will be considered. All cases and papers presented at the 16th Annual Conference will qualify for review and possible publication in the *Southeast Case Research Journal*. SECRA strongly encourages student submissions.

Important Dates

- Abstracts or Complete Cases, Papers, and Panel submissions due: *November 17, 2008*
- Camera-ready abstracts and revised materials due: *January 12, 2009*
- To be included in the printed program, the registration fee paid by: *January 15, 2009*
- Registration & hotel cut-off date for reserving room at conference rate: *January 12, 2009*

Submission Information

Submit cases to the appropriate track chair. Field-researched cases are especially encouraged. During each SECRA conference, a special session is held offering newcomers to case writing and case embryo authors the chance to present case study ideas for critique by experienced writers. The session is targeted toward participants who wish to hone their skills before submitting a full case or article.

SUBMISSION GUIDELINES: The following guidelines are intended to aid in the review and editing processes. Please make every attempt to follow them.

1. Submission Deadline: **November 17, 2008**
2. A tiered submission process of Full Case, Embryo Case, and Abstract-only is available.
3. For Full Cases: Each case must have an accompanying instructor's manual (teaching notes), a title page, and a one-page abstract (see camera-ready abstract format below).
4. Cases or papers submitted must not have been presented or published elsewhere and/or accepted for presentation or publication at another conference.
5. The title page should include name, affiliation, address, phone, and e-mail address for all authors. Indicate the contact author. Identify student submissions, as applicable. SECRA strongly encourages student submissions. The main body of the case should have a title only and no references to the author or the author's affiliation. The instructor's manual should include a title page with authors' names and affiliations as noted above in item 5. The main body of the instructor's manual should have the title of the case only and no references to the author or the author's affiliation.
6. Only full cases submitted by the due date are considered for awards.
7. Cases should be submitted electronically, double-spaced, and no longer than 30 pages. Submit the case and materials as an e-mail attachment to the appropriate Track Chair (TBA) **and** to the Program Chair (Tim Burson, bursont@queens.edu). Address questions to Mick Fekula at mickf@usca.edu or 803-641-3203.

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Case and Topic Matrix

<i>Title</i>	Accounting & Finance	Business & Society	Communications	Education	Entrepreneurship	Ethics or Law	Health Care	HRM	IS or IT	Management	Marketing	Operations	Org Behavior	Quantitative	Social Science/Issues	Strategy
Once The Aggressor, Now The Victim? (p. 1)				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>	
Confusion In The Tax World: A Case Of Getting It Wrong...Right? (p. 2)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>							<input checked="" type="checkbox"/>			
Institutional Review Boards: Implications Of Compliance Ethics For Case Research And Case Authors (p. 3)				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>							<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Shutting Down The Golf Store (p. 4)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>	
Genentech, Inc. (p. 5)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Pretera Center (p. 6)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>
James Filson V. The Big Ten Conference (p. 7)		<input checked="" type="checkbox"/>														
CTD Architects (p. 8)					<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
Coca-Cola Positions A New Non-Carbonated Beverage (p. 9)											<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
The Leadership Dilemma – Lead, Follow, Or Get Out Of The Way? (p. 10)		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Chocolatecoveredcherries.Com (p. 11)					<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
The Bell Sounds For Round One At Fit Inc. (p. 12)						<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			
Idleaire Technologies Corporation (p. 13)	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Krispy Kreme Doughnuts - 2007 (p. 14)	<input checked="" type="checkbox"/>															<input checked="" type="checkbox"/>
Coastal Conservation Association: Reeling In New Members (p. 15)		<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	
Wrapped In Foil: Fuwei Films (p. 16)	<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Late Trading And Market Timing At Putnam Investments (p. 17)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>										<input checked="" type="checkbox"/>

Case and Topic Matrix

<i>Title</i>	Accounting & Finance	Business & Society	Communications	Education	Entrepreneurship	Ethics or Law	Health Care	HRM	IS or IT	Management	Marketing	Operations	Org Behavior	Quantitative	Social Science/Issues	Strategy
“Let’s Talk About Sex...In The Dark” (p. 18)			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>				
Pricing People (p. 19)			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>	
The Vacation Timeshare Industry - 2008 (p. 20)										<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
“Do I Have To Include The Honor Code?” (p. 21)			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>											
Parkview Inn Case (p. 22)				<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Teaching Ethics In Higher Education: Reality Or Fantasy? (p. 23)	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>										<input checked="" type="checkbox"/>	
First National Bank Of Orangeburg Case Integrated Marketing Communication (IMC) (p. 24)		<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Small Town Guns In A Changing World (p. 25)				<input checked="" type="checkbox"/>							<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
Hornet Enterprises Business Plan (p. 26)	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>												<input checked="" type="checkbox"/>
A Case Of Project Management (PM) Failure: The Federal Bureau Of Investigation’s Trilogy Project (p. 27)					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Patricia Davis (p. 28)			<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Ruby Tuesday, 2007 (p. 29)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
The Single Sanction (p. 30)			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>											
Not Again (p. 31)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
US GAAP Out And International Standards In- How Soon? (p. 32)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>											
The Princeton Review: A Different Approach To Course Staffing (p. 33)							<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	
Wyndham Worldwide, 2007 (p. 34)	<input checked="" type="checkbox"/>															<input checked="" type="checkbox"/>

Case and Topic Matrix

<i>Title</i>	<i>Accounting & Finance</i>	<i>Business & Society</i>	<i>Communications</i>	<i>Education</i>	<i>Entrepreneurship</i>	<i>Ethics or Law</i>	<i>Health Care</i>	<i>HRM</i>	<i>IS or IT</i>	<i>Management</i>	<i>Marketing</i>	<i>Operations</i>	<i>Org Behavior</i>	<i>Quantitative</i>	<i>Social Science/Issues</i>	<i>Strategy</i>
Down On The Farm (p. 35)	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>									
Partnership That Did Not Materialize: A Case Of An Aspiring Medical Doctor (p. 36)	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>									
Lee Herron (p. 37)			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>											
Dollywood: Great Place To Work (p. 38)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>						
Dinner Theatre: Gifts Of The Magi – Would The Gift Be Gold Or Coal (p. 39)	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
Clayton Tool Company (p. 40)					<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				
Harley-Davidson, 2007 (p. 41)										<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Harnessing The Technology Of The Package Dispatch System (PDS) Within The Laurel Mountain District (p. 42)					<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Quality Cuisine To Go (p. 43)				<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Mullins Hardware (p. 44)	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>						
Passing The Torch Or Torching The Past? (p. 45)			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>									
Hewlett Packard, 2007 (p. 46)												<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>

CASES/PAPERS

ONCE THE AGGRESSOR, NOW THE VICTIM?

Christine Alberto
Kourtney Kocel
Cathy Thomas
University of South Carolina

Case Synopsis

Caitlin Anderson, a graduate assistant, is an experienced residence hall director who is made aware of incidents of verbal and physical abuse between two freshman students that have taken place in her hall. The students, Roy O'Kelly who lives in her hall and Sally McGrath who lives in another residence hall, have been involved in loud, disruptive and physical arguments each of which were reported to Caitlin by the resident assistant on the floor where they occurred. In accord with procedure, Catlin reported the events to her supervisor. She became frustrated when nothing seemed to come of her reports.

Case Objectives and Use

This case is based on field research with names disguised to protect confidentiality. It describes a real incident and was developed for use in a graduate seminar on ethics in higher education. While there are legal aspects to the case, it is also useful for initiating ethical dialogue about the duties and obligations we have for one another and the ethical principle, do no harm. The case can be used for training resident hall advisors as well as graduate students preparing for careers in residence life.

Contact Person: Kourtney Kocel, Office of Undergraduate Admissions, University of South Carolina-Columbia, SC 29208, 803-777-4413, Kocel@gwm.sc.edu.

CONFUSION IN THE TAX WORLD: A CASE OF GETTING IT WRONG...RIGHT?

Susan Anderson
Gwendolyn McFadden-Wade
North Carolina A & T State University

Case Synopsis

The taxpayer blew the whistle on her employer who violated several environmental statutes. In return, the taxpayer was blacklisted. Riddled with stress from her former employer's action, the taxpayer became physically ill and filed a lawsuit seeking compensatory damages. An administrative law judge awarded the taxpayer damages related to emotional distress, loss of reputation and medical expenses. Ultimately, the award was determined to be taxable by the Internal Revenue Service (IRS). The taxpayer paid the taxes and sued for a refund in trial court. Boldly departing from the routine legal arguments, this taxpayer dared to challenge Congress' authority to tax the award. She asserted a pre-16th Amendment constitutional argument. Not persuaded by this ridiculous assertion, the trial court determined that the taxes were due. Predictably, the taxpayer appealed.

The taxpayer's completely unorthodox argument did not go unnoticed by a maverick appeals court. Ignoring well established tax rules and court decisions, the appeals court embraced the taxpayer's argument, reversed the trial court's decision and determined that the taxpayer was entitled to the refund. At this point, the sleepy tax community woke up.

Case Objectives and Use

The case was based on a recent, controversial, and hotly debated court decision which drew the attention of the tax community because of its unique and unprecedented constitutional challenge. It links tax history with the reality of income taxation in an area of tax law not commonly explored in detail, the taxation of personal injury awards. The case also increases an undergraduate tax student's understanding of the tax law origin and authority. This inquiry demands further research regarding the definition of "direct taxes" which provides students with the opportunity to expand their research skills. It provides a framework for tax students to re-think the traditional understanding of the notion of "income" within the context of the 16th Amendment. It explores the soundness and implications of a tax policy which raises revenue disproportionately from middle and low income taxpayers. Additionally, students have an opportunity to brainstorm alternative ways to avoid income taxes in similar situations.

Contact Person: Gwendolyn McFadden-Wade, Department of Accounting, 233 Merrick Hall, School of Business & Economics, North Carolina A & T State University, Greensboro, NC 29411, 336-334-7581 x 6006, mcfaddeg@ncat.edu.

INSTITUTIONAL REVIEW BOARDS: IMPLICATIONS OF COMPLIANCE ETHICS FOR CASE RESEARCH AND CASE AUTHORS

Chi Anyansi-Archibong
North Carolina A&T State University

Synopsis

Institutional Review Boards (IRB) mandated by the Department of Health and Human Services(DHHS) since 1981 has been responsible for enforcing ethics and protection of humans involved in research studies. Universities and Colleges that receive federal funding are required to establish or initiate institutional review boards to approve informed consent forms used by faculty and staff who conduct research.

Although IRBs were initially and in most cases associated with clinical sciences and bio-ethics engineering, its applications have been extended to qualitative research which in this case includes case studies and writing. Many education institutions have established IRBs to monitor, review and approve research consent forms relating to use of humans in research. Many of the Informed consent forms designed are somehow similar in purpose to the case release forms that case researchers and authors apply to get protagonists to sign off on case publications. Contents of the forms are not the same since the IRB forms vary with respective research.

Objectives and Purpose

This paper/ symposium provides an opportunity to assess the purpose and applications of Institutional Review Boards and its implications for case authors. It discusses recent developments and IRB responses to use of human survey in case research as it applies to social sciences and qualitative research method in particular, using the process for a required Informed consent form by a team of researchers in seven campuses of the North Carolina University system.

The presentation challenges SECRA members and other case organizations to take initiative to develop an appropriate and more comprehensive “consent and release” form that meets its research needs. With the expansion of federal funding and increased applications for research funds among academic institutions, discussion questions for this symposium include-Do case authors need an IRB approved consent form to collect primary data? What differences if, exist between an IRB form and case release form?

Contact Person: Chi Anyansi-Archibong, Dept. of Bus. Admin. 341 Merrick Hall, North Carolina A & T State University, Greensboro, NC27411; 336-334-7656 ext.4025; archiboc@ncat.edu.

SHUTTING DOWN THE GOLF STORE

Joyce M. Beggs
Edward Jernigan

University of North Carolina at Charlotte

Case Synopsis

On Friday, March 15, Chris Stanley, manager of the Golf Store arrived at work promptly at 9:15. Like any other day, he began by unlocking the front door and going to the back room to disarm the alarm. Since the shop did not open until 10:00, he sat at his desk accompanied by breakfast and last night's reports. The report indicated that the sales from yesterday were disappointing at best. Turning the sign from closed to open, the Golf Store was open for business. As noon arrived, so did the heart of the potential customers. Most of the customers were on their lunch breaks and were genuinely interested in making purchases. Around 5:30 in the afternoon, the Golf Store's owner, Bill Duncan came through the front door accompanied by two men that Chris did not know. What was unusual was that Bill always visited the store on Saturday morning. Walking back to the office, Chris was afraid he knew what was coming. Bill told Chris that he was closing the store and that today was the last day the store would be open. Questions raced through Chris's head: What would he tell his wife? What would happen to other employees? What about the customers?

Case Objectives and Use

This case raises the ethical issues of honesty and fairness with employees and with customers. A business is closed and the employees are not given any notice or warning of that decision. In addition, loyal customers received no advance information about the closing. The case was written for undergraduate courses in Business Ethics, Business Communication, or Principles of Management. No preliminary preparation is needed to discuss the issues. It will be of interest to anyone who is willing to think about the impact of business decisions on others. Therefore, the case lends itself to use of stakeholder analysis. Since there is a decision to close the business, a topic of discussion is how that decision should be communicated. The data for this case were gathered through primary sources. Interviews were conducted with the parties involved.

This case was prepared by Joyce M. Beggs and Edward Jernigan from the University of North Carolina at Charlotte, and is intended to be used for class discussion rather than to illustrate either effective or ineffective handling of the situation.

Contact person: Joyce M. Beggs, Department of Management, Belk College of Business, University of North Carolina at Charlotte, Charlotte, NC 28223, 704-687-7709, FAX 704-687-3123, jbeggs@uncc.edu

GENENTECH, INC.

Blaker Bolling

Dale H. Shao

Uday Tate

Jamie Paker

Ryan Phlegar

Marshall University

Stephen P. Shao, Jr.

Tennessee State University

Case Synopsis

In 1976, Robert Swanson (venture capitalist) and Dr. Herbert Boyer (biochemist) founded Genentech, Inc. Boyer was able to demonstrate the ability to use recombinant DNA technology to develop products with applications throughout the world and created the biotherapeutics industry. In 1977, Genentech produced the first human protein in a microorganism. In 1982, they produced the first recombinant DNA drug to be marketed; human insulin (which they licensed to Eli Lilly and Company). Genentech has produced many patentable drugs and continues its expansion in the pharmaceutical marketplace.

Genentech has been the recipient of many awards over the past two decades that would indicate it is consistently one of the top corporations in the country. It is an industry leader and remains on the cutting edge of the field of biotechnology. It has remained consistently profitable in an industry that has many nonprofit companies. In 1999, Roche bought out all of Genentech's stock, they provided harsher restrictions which have discouraged the idea of global expansion into European markets. Their continual great expansion has analysts complaining that the demand for their products may outweigh the supply, and some doubt Genentech can maintain the expansion they have sustained for so long.

Biotechnology is still an emerging marketplace with many new firms. Genentech is very profitable, has survived three decades, and is one of the top firms in the market and they believe this will continue to be true.

Case Objectives and Use

This case provides a unique opportunity to address how a firm in a relatively new and expanding market must adjust its strategic plan to deal with parent company restrictions, nonprofit competitors, doom-and-gloom market analysts, and possible legislation relating to genetic engineering. The firm must ask questions such as whether its present form is the best to maintain its momentum or whether the long term ramifications of its infrastructure and human resources system will allow it to meet its long term goals.

The case is based on an actual company and is relevant to strategy, global topics, ethics, eCommerce, human resources, management, and finance courses, as well as other related courses. This case is relevant to undergraduate and graduate courses.

Contact Person: Dr. W. Blaker Bolling, Division of Management and Marketing, the Lewis College of Business, Marshall University, Huntington, WV 25755. Telephone: (304) 696-2679, FAX: (304) 696-2613, bolling@marshall.edu.

PRESTERA CENTER

W. Blaker Bolling Andrea Conley Steven Gachunga
Sophia Makhatadze Holly West
Marshall University

Case Synopsis

This is a case developed as a term project by four MBA students and is presented as such. The only changes made were with verb tenses and obvious grammar or spelling errors. The case describes the Prestera Center, which is a mental health and substance abuse center centered in Huntington, West Virginia. The center has provided specialized care in both behavioral health and addictions for state residents for over forty years. The staff has developed an integrated system that allows them to meet the individual needs of each and every client.

The case describes the center and the various services offered as well as satellite centers located in West Virginia. Funding sources and limited financial data are presented as well as information on employees and their benefits. The case lacks a clear decision focus and an interesting introduction. However, it deals with a very timely subject in health care and has potential for improvements so suggestions for the students are solicited.

Case Objectives and Use

The case would be appropriate for courses in strategy and health care at the senior level. With appropriate additions, it could be used at the graduate level and in courses in finance.

Contact Person: Dr. W. Blaker Bolling, Division of Management and Marketing, the Lewis College of Business, Marshall University, Huntington, WV 25755. Telephone: (304) 696-2679, FAX: (304) 696-2613, bolling@marshall.edu.

JAMES FILSON v. THE BIG TEN CONFERENCE

Raphael O'Hara Boyd
Clark Atlanta University

"The case of the Big Ten Conference Football Referee who only had one eye!"

Case Objectives and Use

This is an informative and interesting case that examines traditional and emerging legal concepts concerning various tort claims. The objectives of this case are threefold. The first objective of this case is to expose students to specific areas of traditional statutory, tort, and employment discrimination concepts as applied in a real-world situation. The second objective is to provide students with a basic understanding of the Americans with Disabilities Act (ADA) as well as how it is applied in a "real-world" environment. The third objective is to develop and/or improve the student's analytical and reasoning skills. This case is appropriate for graduate and undergraduate Business Law courses.

Case Synopsis

James Filson officiated Big Ten football from 1992 until 2004. However, Filson lost his right eye in 2000 due to an unfortunate accident. He was allowed to continue to referee games until he was fired several years later after one of his calls was overturned and the fact that he had only one eye became known to certain persons.

This was a highly publicized legal case that involved the Americans with Disabilities Act and other claims. This case will examine these legal concepts as well as the various defenses and responses necessary to counter allegations.

This case has a component, which will require students to make decisions, comments, and recommendations concerning the political aspects, public policy aspects, and the real word decisions that are a result of this type of case.

This case has been based on a lawsuit filed against the Big Ten Conference by James Filson in U.S. District Court, N.D. Illinois, Eastern Division. With exception of the names of the plaintiff-Filson and the defendant-Big Ten Conference, the other individuals as well as certain places have been altered in this case. Although this case may be applicable in a number of graduate and undergraduate legal courses, it is highly recommended for a Graduate Business Law course and an Employment Law class.

Contact Person: Raphael O'Hara Boyd, Department of Management, School Of Business, 107-C Merrick Hall, Clark Atlanta University, 223 James P. Brawley Drive, S.W., Atlanta, GA 30314, 404.880.6050, rboyd@cau.edu.

CTD ARCHITECTS

Tim Burson
Chuck Bamford
Queens University of Charlotte

Case Synopsis

Allen Todd, a senior partner at CTD Architects, has to make a decision whether or not to accept a particular project offer. Todd had been contacted by the project manager of Pacific Vista Country Club, a very famous and exclusive golf course, and been given the opportunity to perform the architectural work on an extensive redesign of their clubhouse. The firm had done this type of job in the past, the time frame of the job was workable, and it appeared that CTD would be able to negotiate a favorable fee from the client. A further potential benefit would be for CTD to have its work exposed to Pacific Vista's membership, which was filled with business and political leaders, and could lead to additional work in the future.

There was much to like about this offer, but there were also aspects of the project that concerned Todd. The golf club and its membership had a reputation for doing things their own way, and had already suggested conditions of anonymity and access that were very unusual in the architectural business. The client offered unique and intriguing positives, but also brought considerable "baggage" to the table. Todd's partners gave their views on the project but since Todd's workgroup would perform the job, the final decision was his ultimately. Todd could see himself accepting the job and regretting it later; he could also see turning down the job and being nagged by "what if" questions.

All businesses are faced with opportunities and constraints to their business. Absent some mechanisms for evaluating whether new opportunities meet the goals of the business, what constitutes a good opportunity becomes an exercise of constant evaluation that can inhibit the development of a company. As has been said often, not all business is good business. There are indeed sales that should be declined, customers that should be sent to others and a focus placed on the most profitable, consistent business available. CTD had a very good reputation and had the opportunity to take on a lot of business. The senior partners decided that the Vista project should be a catalyst for the firm to look at their perceived competitive advantages and attempt to utilize some strategy techniques to establish a vision for the company going forward.

Contact Person: Tim Burson, Box 1420, Queens University of Charlotte, Charlotte, NC 28274, 704-337-2402, bursont@queens.edu.

COCA-COLA POSITIONS A NEW NON-CARBONATED BEVERAGE

Katherine Carman
Raymond Warga
Queens University of Charlotte

Case Synopsis

Coca-Cola Bottling Company developed the subsidiary ByB Brands, Inc. to broaden their penetration into the non-carbonated beverage market. ByB Brands, Inc. obtained the licensing rights to *Respect*, a vitamin and mineral enhanced drink, in June 2007; they continued to sell the product, relying on Coca-Cola's distribution infrastructure to market the product throughout the eastern United States. After several months of distribution, *Respect* had not penetrated the market and consumers showed very little brand awareness. ByB Brands, Inc. need a new market strategy for their product.

During the fall of 2007, the ByB Brands, Inc. contracted marketing research studies to help with the repositioning of the product. The research team tested brand awareness and perception, beverage preference patterns, taste preference, and age and gender demographics. The data provided the basis for ByB Brands, Inc. to reposition the beverage *Respect* in the market place.

Case Objectives

This Coca-Cola Bottling Company case, intended for undergraduate marketing students, presents issues associated with introducing and positioning a new vitamin drink, *Respect*, into the beverage industry. The case was written from an actual business situation and includes real data collected from principle interviews and surveys. Students are presented with background information about the company and the product, as well as current data pertaining to today's relevant beverage market.

The case requires students to apply the provided data from the perspective of a marketing analyst for the brand. Students will address the various components of a product's marketing mix as well as the behavioral tendencies of consumers. This is an engaging case for students because of their daily participation in the changing drink marketplace.

Contact Person: Katherine Carman, Box 941, Queens University of Charlotte, Charlotte, NC 28274, 513-315-0526, carman.katherine@gmail.com.

THE LEADERSHIP DILEMMA – LEAD, FOLLOW, OR GET OUT OF THE WAY?

David Condon
*South Carolina Association of
Technical College Commissioners*

Case Synopsis

The central character is vice-chair of a community college board of trustees. He is concerned about the college's sporadic success in aligning courses and programs with local business and industry demand. As he describes the situation, a subplot emerges over the college's role in serving local workforce development needs versus fulfilling an academic transfer role. The college has had some success with aligning technical and industrial programs in the past but not on a sustained, systemic level.

The trustee also serves as his college's representative to a statewide trustee association. At a meeting of the statewide association board, he shares his concerns and asks colleagues from other colleges about their experience with alignment issue. As the dialogue unfolds, a key question emerges: How should a governing board see that a mission critical policy is successfully carried out when existing efforts seem to be falling short?

Case Objectives and Use

This case study presents an opportunity to address the most critical issue concerning policy governance: where does the line exist between a board setting policy and monitoring progress versus micro-managing the administration of an institution? Here, a community college trustee shares with counterparts his conflicted thoughts about how to balance these competing demands in a situation where performance is not living up to expectations. The case study offers multiple points for exploring this ever present dilemma. While no 'right' answer exists, discussion and analysis is a valuable exercise in developing a proper understanding of the responsibilities of effective governing boards.

The case, based on an actual situation, was written for a graduate course in the Certificate program in Higher Education Leadership at the University of South Carolina.

Contact Person: David Condon, Executive Director, South Carolina Association of Technical College Commissioners, 121 Executive Center Drive, Suite 105, Columbia, SC 29210, (803) 798-8528, condon@sctechsystem.com.

CHOCOLATE COVERED CHERRIES DOT COM

(<http://ChocolateCoveredCherries.com>)

Emily R. Cornwell

Lan D. Nguyen

Tam T. Tran

Christopher M. Cassidy

Marshall University

Case Synopsis

Michelle Hill, the owner of ChocolateCoveredCherries.com, is an entrepreneurial minded business woman located in Barboursville West Virginia. She currently owns and runs two different businesses. ChocolateCoveredCherries.com supplies hand dipped, ultra high quality, confections to customers who order via the internet. ChocolateCoveredCherries.com has grown explosively with 100% growth every year for the last 4 years. Her other business is a growing retail establishment with substantial internet sales. She is also active in various family business opportunities. The rapid growth of her businesses has caused Michelle to reevaluate her business processes and rethink the way she organizes her time.

Expansion of a luxury goods provider is more complex than simply hiring more people and building more capacity. Although she can hire others to do the work she used to do, some of that work involved skills (e.g. self administered quality control) that are difficult to transfer to non-owner workers. Additionally, She developed her secret recipes though extensive testing and believes that they far exceed those of her competitors. Only a handful of her most trusted assistants know the ingredients and methods of preparation. This imposes capacity restrictions on her by-hand manufacturing methods. Michelle wants to know what she can do to expand without jeopardizing the quality of her Cherries. How should she proceed?

Case Objective and Use

This case provides students the opportunity to examine a small internet business in the rapid growth stage. Michelle is typical of many entrepreneurs, in that she recognizes more market opportunities than she has time to exploit them.

This case is based on an actual small business in the rapid growth stage. The case is intended for undergraduate and graduate classes discussing General Management, Entrepreneurship, Family Business Management, Small Business Management, Operations Management, Organization Theory, and Strategic Management. While a little limited in quantitative data, the case contains extensive qualitative data for conceptual discussions of business strategy, opportunity recognition, and business investing.

Contact Author: Christopher M. Cassidy, Division of Management and Marketing, Lewis College of Business, Marshall University, One John Marshall Drive, Huntington, WV, 25755. Phone: 304-696-4320; Fax: 304-696-6013; E-mail: cassidyc@marshall.edu.

THE BELL SOUNDS FOR ROUND ONE AT FIT INC.

Steven Cox
Queens University of Charlotte

Kristy Eubanks
Meredith College

Alyssa Cox
Temple University

Case Synopsis

Workplace violence is a significant problem for managers today. Whether that violence is overt, such as a fistfight, or more subtle, such as verbal harassment, students need to appreciate the warning signs and how to take action before they become serious disruptions. In the case presented, a fistfight broke out between two employees of FIT Inc. The student is placed in the position of Joyce Schofield, FIT's CEO, who must decide how to respond. The case examines not only the event, but the underlying reasons for the antagonism and permits the student to develop strategies to solve the current problem and minimize the possibility of future violent behaviors. The case is based upon field research and is appropriate for use in undergraduate courses in human resource management and business law.

Case Objectives and Use

The case is intended to demonstrate and stimulate discussion surrounding organizational behavior and management techniques and is appropriate for use in both graduate and undergraduate settings. It is suitable for any course covering topics in organizational behavior, human resource management, and business law and is designed for in-class discussion purposes. This case also lends itself to in-class role-plays in which students may play the parts of any one of the three characters in the case. Role-playing situations may include Ken attempting to verbally resolve his conflict with Bill, or Joyce interacting with Bill after the fight to resolve some of the underlying issues of the conflict.

The teaching objectives of this critical incident are to have students be able to:

- a) Create a plan to manage conflict and avoid conflict escalation.
- b) Understand the legal implications a company faces when dealing with work place violence.
- c) Analyze various alternatives and determine a course of action in concert with the concept of the psychological contract.

Contact Person: Steven Cox, Associate Professor of Marketing, McColl School of Business, Queens University of Charlotte, 1900 Selwyn Ave., Charlotte, NC 28274, coxs@queens.edu.

IDLEAIRE TECHNOLOGIES CORPORATION

Courtney Dalton
Mary Kay Sullivan
Maryville College

Case Synopsis

IdleAire Technologies Corporation began as an idea that a long-haul trucker articulated: How could truckers stay warm (or cool) in their cabs at night without running their engines? Idling the engine was costly, especially with fuel prices rising, and added wear to the engine. A family member of the trucker, A. C. Wilson, sketched out a system that would enable trucks to hook up to a device that would provide air conditioning, heating, movies, and Internet service. After Wilson showed this to business partners and friends, IdleAire Technologies was born.

The case tracks the evolution of this new venture through its beginning search for start-up capital to plans for a possible initial public offering in 2007. While the company has developed a product that seems to be desired by potential customers and is very much in line with environmental concerns of the times, the build-out of the product is very capital intensive. Further, potential competitors are on the horizon.

Case Objectives and Use

This case could be used in an Entrepreneurship course as an example of a product arising directly from perceived customer need. Subsequent steps of developing an experienced management team and the ensuing search for start-up capital, in this case from individual investors, show a well thought out business plan in action. A course in Venture Finance could explore various methods of raising capital and preparing for an IPO.

The case could also be used effectively in a course in Strategic Management. It would lend itself well to analysis using Porter's Five Forces model, with particular attention to potential substitutes and potential new entrants. Another good model would be Barney's VIRIO analysis, in order to determine if the new company's resources are sufficiently rare and not readily imitated so as to keep potential competitors at bay.

Contact Person: Mary Kay Sullivan, Division of Social Sciences, Maryville College,
Maryville, TN 37804-5907, 865-981-8234, marykay.sullivan@maryvillecollege.edu.

KRISPY KREME DOUGHNUTS - 2007

Forest R. David
Francis Marion University

Mario Musa
University of Mostar (Bosnia & Herzegovina)

Case Synopsis

Krispy Kreme Doughnuts (KKD) (www.krispykreme.com) is a comprehensive business policy and strategic management case that includes the company's fiscal year-end January 2008 financial statements (if available), competitor information and more. In January 2005, KKD reported a net loss of \$198M followed by net losses of \$135M and \$42M in January 2006 and January 2007 respectively. A turnaround strategy is needed. The case time setting is the year 2008. Sufficient internal and external data are provided to enable students to evaluate current strategies and recommend a three-year strategic plan for the company. Headquartered in Winston Salem, NC, Krispy Kreme's common stock is publicly traded on the New York Stock Exchange under the ticker symbol KKD. Krispy Kreme produces over 20 varieties of doughnuts, coffee, and other beverages. As of January 2007 the company operated over 385 stores in 40 states and many nations around the world, including the UK, Australia, Canada, Indonesia, Kuwait and South Korea. The company has over 4,000 full time employees and is led by CEO James Morgan who replaced Daryl Brewster in January 2008. Morgan's base pay was only \$125K in 2007. The firm's major competitor is Duncan Donuts.

Contact Person: Forest R. David, Francis Marion University, P.O. Box 100547 Florence, SC 29501, forest_david@strategyclub.com.

COASTAL CONSERVATION ASSOCIATION: REELING IN NEW MEMBERS

Luther Trey Denton
Michael McDonald
Russell Kent
Georgia Southern University

Case Synopsis

This case is about Charles McDermott, an avid coastal fisherman and chairman elect of the Board of Coastal Conservation Association (CCA) and the problems CCA faces nationwide.

Coastal Conservation Association (CCA) is a national, non-profit organization dedicated to protecting the recreational saltwater fishery for the enjoyment of present and future generations. It is an organization that promotes responsible consumptive enjoyment of what is increasingly recognized as a highly fragile resource, the United States saltwater fishery. CCA occupies a unique niche among environmental non-profits in coastal communities, supporting science-based management of marine resources and anglers' enjoyment of those healthy resources. CCA supports the use of scientifically-based fisheries management techniques that allow the greatest freedom for recreational anglers while ensuring the health of the resource. While membership (currently 94,544) and political influence continue to expand, Charles and the other CCA directors are disappointed that growth has been inconsistent and that market penetration in key states remains low. CCA directors also are examining the value of forming ad hoc strategic coalitions with other conservation-oriented nonprofits to potentially boost participation in CCA events and to increase political influence.

Case Objectives and Use

This case describes the marketing challenges facing Coastal Conservation Association in its ambition to represent the views and interests of conservation-minded saltwater recreational anglers in the United States. Even with a track record of considerable success in terms of membership growth and fisheries, CCA faces a variety of marketing challenges that will require skillful strategic maneuvering in the near future.

The case is designed for use in both undergraduate and graduate courses in marketing, marketing research, non-profit marketing, and non-profit management. Its focus on recreational saltwater fishing and the conservation of marine resources makes the case particularly attractive to students who share an interest in nonprofit organizations, conservation, outdoor recreation and sports management, and/or fishing.

Contact Person: Michael McDonald, College of Business, P.O. Box 8050, Georgia Southern University, Statesboro, GA 30460, 912-681-5483, mmcdonal@georgiasouthern.edu.

WRAPPED IN FOIL: FUWEI FILMS

Vernon Disney
Hendrikus E.J.M.L. van Bulck
University of South Carolina Sumter

Case Synopsis

Initial Public Offerings (IPOs) often create excitement in financial worlds because an IPO is a corporation's first attempt to raise public capital. A successful IPO can skyrocket a novice company into the public spotlight while raising considerable capital for new ventures. But "going public" also means that such companies suddenly are subjected to regulatory compliance and reporting requirements. Large upfront cash outlays are required because of these compliance requirements and flotation costs. The combination of perceived opportunities and related risks to both the issuing company and the investors, and the involvement of large underwriters and legal firms sometimes creates a mystery that resembles a good novel.

Fuwei Films (Holdings) Co. Ltd. (FFHL) is a fairly small Chinese manufacturer of plastics films using the biaxial oriented stretch technique, otherwise known as BOPET film (biaxially oriented polyethylene terephthalate). The Company has a market capitalization of about \$55 million. The company has been fairly successful in terms of profitability (Return on Equity 22.76%) and growth (Quarterly earnings growth of about 22%). The company went public (NASDAQ) on December 19, 2006 with an opening price of \$8.51 per share. The price of the stock quickly rose to a high of \$18.43 and within a year fell to low of \$2.12. The stock's price has remained very volatile.

Based on key statistics, such as P/E ratio and EPS, FFHL is undervalued. But Fuwei Films has been in the news since day one. First came the disclosure that the Chinese government arrested three shareholders and directors of the Company, who together held a majority of the stock. The threesome was charged with crimes related to selling state-owned assets at low prices. The next blow to the Fuwei came when the Company received a NASDAQ Staff Deficiency Letter. Because of the arrests, the Company no longer met the audit committee requirements for continued listing on The NASDAQ Stock Market. Then Fuwei's independent accountant resigned in the midst of all the turmoil. By the end of its first anniversary as a public company, FFHL's management admitted that it been unable to secure financing for the promised production-line expansion.

Case Objectives and Use

The objective of this case is to illustrate how characteristics of management, the asymmetry of information and the dynamics of market float and trading patterns combine to affect the price of a stock.

Contact Person: Hendrikus E.J.M.L. van Bulck, Division of Business and Economics, USC Sumter, 200 Miller Road, Sumter, SC 29150, 803-9383895, vanbulck@USCSumter.edu.

LATE TRADING AND MARKET TIMING AT PUTNAM INVESTMENTS

John B. Duncan
Jason Harvey
Charleston Southern University

Case Synopsis

This case describes the fraud involving late trading perpetuated by Putnam from about 2000 to 2003. Several investment fund managers engaged in market timing trades and personally made large windfalls. The SEC charged Putnam and the managers with civil securities fraud. The main character in this case has worked for several years for Marsh & McLennan, the parent company of Putnam Investments. Before leaving the firm she learns that fund managers at Putnam are engaging in market timing and late trading. Later she serves as a whistle blower and informs the State Attorney General of New York about the illegal trading practices at Putnam. This event triggered an investigation of the mutual fund industry that uncovered widespread incidents of market timing and late trading by fund managers with a number of firms.

The case explains what is involved in market timing and late trading and who suffers from these practices. It presents information about the firm, the principle parties involved in the scandal, and the impact on the traders, the firm and investors.

Case Objectives and Use

The case is designed to help students understand mutual fund frauds and investment scams such as illegal market timing and late trading. The case describes an actual case of late trading and illustrates that investors suffer loss from mutual fund frauds perpetuated by mutual fund investors. This case can be used in undergraduate or graduate classes dealing with investments, fraud, or business ethics.

Contact person: John B. Duncan, Charleston Southern University, School of Business, P.O. Box 118087, Charleston, SC 29423, Phone: (843) 863-7025, e-mail: jduncan@csuniv.edu.

“LET’S TALK ABOUT SEX...IN THE DARK”

Rachel Edington

Erik Jensen

Heather Porter

The University of South Carolina - Columbia

Case Synopsis

This case focuses on the challenges of a new professional contending with deliberate deception on the part of her employees. Returning home from a class, the professional – Megan Randolph - discovers that three student employees have held an event in which they encouraged students to “make out,” while they were supposed to hold an event on sexual health. The case discusses the details of that event, the consequences on the students involved and the reactions of the employees who held the event. Ultimately, it asks what the best reaction will be on Randolph’s part to the entire situation.

Case Objectives and Use

This case was developed for use in an ethics in higher education seminar to stimulate dialogue on confronting unethical behavior. It is based on field research and describes an actual situation although the names of individuals and the institution are disguised.

One of the more difficult tasks of student personnel administrators is to confront students who have made poor choices and behaved badly. Punishing students for their mistakes is an option that some professionals find uncomfortable or even objectionable. They prefer an educational approach where students are given the opportunity to learn from their mistakes. This case allows professionals in training to think through what approach they might best use when dealing with errant students for whom they are responsible. Issues of honesty, justice and professional duty are brought to the fore in a dialogue initiated with this case.

Contact Person: Heather Porter, Student Success Center, University of South Carolina, Columbia, SC 29208, 803-777-4140, porterh@sc.edu

PRICING PEOPLE

Alicia Erwin
Kelly Herbolich
Amy Spurlock
University of South Carolina-Columbia

Case Synopsis

Michael Cardella, Assistant Vice President of Student Affairs, received a call at home on Saturday from the Director of Multicultural Student Affairs upset about a student event going on in the University Union. The New Conservatives, a student group formed to raise awareness on political issues, were holding an affirmative action bake sale to point out the inequalities of affirmative action policies. They were also amusing themselves playing Ghettopoply, a board game based on negative racial stereotypes. Michael could hear the agitated voices of students in the background as he tried to figure out his response.

Case Objectives and Use

Affirmative action is a hot-button issue for many people who view it as unfair. Although the presenting problem in this case is how to respond to a potentially explosive situation between students on both sides of the issue, it does allow for a dialogue about affirmative action on campus. The case was designed for use in a graduate seminar on ethics in higher education to initiate dialogue on ethical principles of respect and justice among student preparing for careers in college student personnel administration.

The case is based on field research and depicts a real situation. However, the names of individuals involved and the institution are disguised.

Contact Person: Kelly Herbolich, Student Success Center, University of South Carolina, Columbia, SC 29208, 803-777-4192, herbolic@mailbox.sc.edu

THE VACATION TIMESHARE INDUSTRY - 2008

Michael J. "Mick" Fekula
University of South Carolina Aiken

Case Synopsis

The ever-changing face of the vacation timeshare industry has contributed to an estimated economic impact in excess of \$66 billion. Recent years have not only seen the reputation of the industry enhanced by the entry of more major hotel corporations, improved packages for consumers have increased sales growth. While traditional timeshares locked-in particular dates and locations, industry innovations now give consumers ultimate flexibility in season choice and location. But these are not the only factors contributing to timeshare popularity as a vacation alternative. The median price of a vacation home was \$200,000 in 2006, accommodated by purchasers with a median income of \$102,000. In short, owning a vacation home has become an expense option for vacationers. Further, the volatility of the real estate market and the premium costs associated with popular destinations make owning desirable vacation property unrealistic for many consumers. In contrast, vacation timeshares not only allow ownership in locations that would otherwise be unaffordable, the latest timeshare resort accommodations and amenities are second to none. Even when purchased brand new, these properties can be owned for around \$15,000-\$35,000 in even the most expensive vacation destinations. This case describes exciting changes in this industry, the factors driving the industry, and the major corporate players who are on board.

Case Objectives and Use

The objective of this case is to have students analyze the major players in the vacation timeshare industry at the industry level. Students should focus upon the dominant economic forces of the industry, as well as the following strategic factors: Porter's 5-Forces, the value chain, generic strategies, strategic groups, and portfolio analysis. In addition, students can employ SWOT analysis to address consumer trends and factors, as well as environmental forces.

Contact Person: Michael J. "Mick" Fekula, School of Business Administration, University of South Carolina Aiken, 471 University Parkway, Aiken, SC 29801, 803-641-3203, Fax: 803-641-3445, mickf@usca.edu.

“DO I HAVE TO INCLUDE THE HONOR CODE?”

Stephanie M. Foote
University of South Carolina Aiken

Case Synopsis

Amanda Wright was teaching the Student Success Seminar (SSS 101) for first-year students at Eastern University. She began her class, as she had in previous years, with a discussion about the differences between high school and higher education. At the end of the class, Amanda asked her students to read the first chapter of their textbook and write a short reflective journal elaborating on their own feelings and concerns about the transition to college, and reminded them to include the signed honor code attached to their journal assignment. At the beginning of the next class meeting, Amanda collected the reflective journals. As she was reading them later that day in her office, she noticed that Eva Smith’s assignment included some information that didn’t appear to be written at the level of a first-year student. Amanda conducted an Internet search using some of the exact phrases in Eva’s journal and immediately found that the majority of the information in her paper was identical to the content of a website. Stunned, she wondered why anyone would take information from a website, without citing it, for a simple assignment such as this. Amanda also contemplated what she should do, Eva had submitted the assignment with a signed honor code, indicating she had done all of the work herself.

Case Objectives and Use

In first-year courses like the Student Success Seminar described in this case, the course content and assignments often include reflection on the college transition. This case provides a situation in which an instructor is faced with a student who has broken the university’s honor code by potentially plagiarizing information in their first written assignment for the class. This case is based on personal experience and was developed to initiate dialogue among graduate students preparing to teach at the college level or in faculty development workshops. The names and some peripheral facts have been disguised to protect confidentiality.

Contact Person: Stephanie M. Foote, Director, Academic Success Center and First-Year Experience, University of South Carolina Aiken, 471 University Parkway, Aiken, SC 29801, 803-641-3321, stephanief@usca.edu.

PARKVIEW INN CASE

Thomas W. Garsombke
Claflin University

Diane J. Prince
Clayton State University

Richard Fulton
Troy University at Augusta

Shingaidzo Chidyausiku
Claflin University

Case Synopsis

The Parkview Inn case deals with a small motel that is up for sale. It is based on a real business, but the names and location were changed at the owner's request. There are strategic management, marketing, financial and operational issues presented. Additionally, social/cultural, economic, and political/legal factors impact the possible purchase and profitable operation of the business. These internal and external issues require students to make a buy/no buy decision using financial and operational information. Whether they decide to buy the business or not, students must justify their decision with appropriate financial ratio calculations, cost estimates for development of the various assets, and lastly, a short break even analysis for possible new cabins.

In nearly all the classes where the case has been utilized, students were required to develop a pro forma financial statement to determine how and if the business could be more profitable -- and thus be a good purchase. This case produces very good discussions and requires students to do pre-class work on the pro forma statement and action plans for the various management and marketing issues presented.

Case Objectives and Use

Because the business is a small business and its purchase and operation very viable (real) for business students, many find it most interesting and get very involved in its analysis. As the case is not extremely long, it is a good case as an opener for the start of the semester. It produces excellent student discussion as students feel comfortable with its analysis and their plans of action.

Students' comments have always been extremely positive, with most focusing on the process of determining the viability of the Inn for a young or new entrepreneur. The case has been used in Strategic Management, Small Business Management, Entrepreneurship, and Marketing Management classes at both the undergraduate and MBA level.

Contact Person: Dr. Thomas W. Garsombke, School of Business, Claflin University, 400 Magnolia Street, Orangeburg, SC 29115, 803-535-5616, tgarsombke@claflin.edu.

TEACHING ETHICS IN HIGHER EDUCATION: REALITY OR FANTASY?

Robin Guill Liles
Miriam L. Wagner
Tyra Turner Whittaker
North Carolina Agricultural and Technical State University

Case Synopsis

Instruction in ethics is commonly found in higher education, and undergraduate and graduate majors which result in degrees conferring professional status (e.g., business, counseling, etc.) almost universally include courses focused upon ethics and ethical decision-making. This educational standard starkly contrasts with daily public reports across professional branches which describe questionable practices and lapses in professional judgment. Embarrassing and dishonorable behavior among professionals and ensuing allegations of ethical violations and lawful misconduct are often broadcast to members of the greater social community provoking their ridicule, cynicism, doubt, and outright disbelief. The worry is that within this distressing, frequently satirical, milieu, certain ethical malfeasance could insinuate itself into, and gain legitimacy within, our ethical “consciousness.” Even more concerning is the threat that ethical ideals, historically touted in the classroom, would be diluted to tolerate ethical breaches observed in professional communities, yet gone unnoticed or unaddressed. If so, the relevancy of ethical lessons in higher education must ultimately be devalued, and the ethics professor’s voice, diminished.

This case describes one counselor educator’s efforts to uphold and teach long-held ethical ideals while simultaneously acknowledging to her graduate counseling students the ethical minefields set forth through mental health reform.

Contact Person: Robin Guill Liles, Department of Human Development and Services, North Carolina Agricultural and Technical State University, 1601 E. Market Street, Greensboro, NC 27411 (336) 334-7916; rgliles@ncat.edu; <http://www.ncat.edu/~schofed/newsite/>

FIRST NATIONAL BANK OF ORANGEBURG: INTEGRATED MARKETING COMMUNICATION (IMC)

Gwen F. Hanks
Berry College

Case Synopsis

The main issue of this case is the probable decision of a locally owned bank rooted in one of the largest counties in South Carolina to change its name and reposition itself for continued future growth. While attempting to reconcile the real desire for statewide growth, expansion, recognition, and passion with the deeply imbedded roots of the organization in Orangeburg, the leadership is attempting to select a name that will better identify the bank and avoid confusion. The goal is to expand and identify the banking operation in the entire state, while maintaining present loyalty among local employees and customers. The decision balances on how to accomplish the total revamping, renaming, rebranding, and repositioning of a bank that has been a fixture in its hometown since 1934, when it began with six employees and \$100,000 in deposits. At the brink of this important strategic decision, the First National Corporation operates First National Bank of Orangeburg, SC, as well as several other banking entities, as one of a few independent, locally owned banks in South Carolina and Orangeburg. The corporation has been growing organically and by acquisition.

With the goal of developing a stronger state presence, “a better way to convey our passion about South Carolina” as a whole, FNB’s board of directors and management team are considering a renaming initiative, followed by an integrated marketing communication program to roll out the new brand within the organization, the city, and simultaneously throughout the entire state. They feel that “First National Bank” is a very generic name, unsuitable and unable to reflect their statewide operations.

In addition, the leadership is considering relocation of its corporate headquarters to the state capital in Columbia, to reinforce its new identity as a statewide entity. Columbia is centrally located in relation to air transportation, interstate highways, the legislature, the Carolina Center, and the regional Convention Center. The board sees the headquarters relocation and the name change as separate strategic decisions, but plans to manage them proactively. The pressing issue is how to accomplish the primary goal, attain the mission “to be South Carolina’s premier community bank and a top performing bank in the Southeast,” while maintaining a commitment to Orangeburg, their home and headquarters since the beginning.

Case Objectives and Use

This case is appropriate for strategic decision making (growth, change) and integrated marketing communication. The case challenges the decision maker to consider the common situation of seeking a new corporate identity, and to be proactive in managing change (the repositioning/rebranding and a corporate headquarters move).

Contact Person: Gwen F. Hanks, Department of Marketing, Campbell School of Business, Berry College, Green Hall 202, Mount Berry, GA 30149, 706-290-2688, ghanks@berry.edu

SMALL TOWN GUNS IN A CHANGING WORLD

Brian A. Hatcher
Michael J. “Mick” Fekula
University of South Carolina Aiken

Case Synopsis

Despite high prices, poor business hours, inconsistent quality of work, and a community view of weak customer service practices, a small town gun store survives through life threatening governmental regulation, significant increases in technology in the industry, the ever-increasing age of the owner, and competition from major chain retailers. At the age of 86, the owner has had the business for sale for several years. With a very high price tag and a cloudy measure of income it is unclear if the business will survive the high cost of the sale.

Accompanied by years of experience in the firearms industry, the main character in this case discusses the operations of this gun store in a small town. During his career he was a military scout/sniper, completed a college degree in gunsmithing, worked in firearm sales, engaged in gunsmithing for profit, and manufactured custom firearms. He examines the small shop through the eyes of experience, personal exposure, and a business management education. Contextual industry background is provided to help understand the complex inner workings of the industry, where applicable.

Case Objective and Use

Here is an opportunity to examine how a business has been able to survive despite many shortcomings and an increasingly hostile environment toward small gun stores. With uncertain government regulations, emerging technology, and behemoth superstores chomping at their heels, the question is, “Will mom and pop stores like this survive through the next generation without making big changes?” Further, this case can be used to propose the changes that might ensure survival after an acquisition by new owners. This case is based upon an actual business and only the names have been changed for this write-up.

Contact Person: Michael J. “Mick” Fekula, School of Business Administration, University of South Carolina Aiken, 471 University Parkway, Aiken, SC 29801, 803-641-3203, Fax: 803-641-3445, mickf@usca.edu.

HORNET ENTERPRISES BUSINESS PLAN

Keith C. Jones
North Carolina A&T State University

Stewart Husted
Virginia Military Institute

Case Synopsis

The main focus of this case is a decision pertaining to the funding a new venture called Hornet Enterprises. This is a combined student (internship opportunities) and non-student business which will be housed within the not-for-profit environment of Seven Hills University. The Hornet Enterprise group has provided projected financial information for the first five years of business along with other key cost information. They are looking to you for either approval or rejection of their request to borrow \$25,000.00 (72% of needed capital) to launch the business. The industry is a very highly competitive industry and their work force will consist mainly of students during the academic year supported by two full-time employees.

Case Objective and Use

This case is based on an actual project developed by a group of faculty within the realm of an on-going Entrepreneurial internship for students. The main focus of this case is for students to analyze the business plan and determine if staffing is correct, if the financial projections are feasible, and if the investment would be appropriate. Students are able to make the appropriate quantitative type decisions based on the provided information.

While this case is designed to be used in an undergraduate entrepreneurship course, it could possibly be used at the graduate level. Because of the nature of the case, it can be used in a small business finance or venture capital course as well.

The main objective of this case is to provide students an opportunity to realize the complexity of turning a legitimate business into a working document and functioning business. All of the critical financial information is provided. This case provides for an excellent discussion opportunity.

This case is a very applied perspective. This case requires the student to take the theoretic aspects that he or she has learned in the classroom and apply it to a real world situation. This business plan was submitted for funding to Seven Hills University and the affiliated financial institution. The results of that submission are discussed in the teaching note for the case.

Contact Person: Keith C. Jones, Department of Business Administration, 337 Merrick Hall, NC A&T State University, 1601 East Market Street, Greensboro, NC 27411, 336.334.7656 Ext. 2390, kcjones1@ncat.edu.

A CASE OF PROJECT MANAGEMENT (PM) FAILURE: THE FEDERAL BUREAU OF INVESTIGATION'S TRILOGY PROJECT

Kristen Kelly
Richard Platt
Martin Hornyak
University of West Florida

Case Synopsis

Since its inception, the Federal Bureau of Investigation (FBI) has been a lead United States Government (USG) agency protecting its citizenry from growing internal and external threats. However, its information technology infrastructure did not evolve as the world changed becoming a more complex and dangerous place. This case study begins by capturing several historical events suggesting serious flaws in the FBI system. The noted events led to the FBI beginning the restructuring of its information technology systems with its Trilogy project. However, the FBI failed to follow basic project management principles to conduct the Trilogy project.

As a management consultant, you are asked to provide guidance on how to conduct follow-on improvements for the FBI's information technology infrastructure. Students are asked to analyze how the FBI and its Trilogy project failed at being good stewards of the taxpayer's money. What does the FBI need to do to avoid a similar situation in the months ahead.

Case Objectives and Use

This case provides the opportunity to consider how organizations organize and manage major projects activities. The case is intended for use in an Operations Management, Management Information Systems or Public Policy course. Students are able to see the complexities involved in large Information Technology (IT) projects. The case leads to an understanding of outside variability introduced into IT environment and its impact on organizations. A good discussion on the importance of good project management and organization behavioral skills may result. Students may provide their personal experiences dealing with IT in their work organizations.

The case is based on actual actions taken by the FBI during its first attempt at improving its information technology infrastructure and it was not accomplished successfully. The case can also be used for undergraduate courses that involve basic management and project management fundamentals, small business, information technology, ethics, or strategic management. Students should be able to articulate what management and project management skills are important to use in other situations like this and should be able to explain why.

Contact Person: Martin J. Hornyak, College of Business, University of West Florida, 11000 University Parkway, Pensacola, FL 32514, 850-474-2039, 850-474-2314, mhornyak@uwf.edu.

PATRICIA DAVIS

Melissa Kesling
Carly Baker
Queens University of Charlotte

Case Synopsis

Patricia Davis was hired as the dean of the business school of a small, private Southeastern liberal arts school in 2001. Some questioned her decision, as Davis had been the dean of a much larger business school at a more prestigious Northeastern university, and the move entailed a substantial cut in salary. Still, Davis loved the area, was impressed by the school's culture and the commitment of its faculty, and was intrigued by the fact the university's president would be stepping down in two to three years. Davis had long aspired to be a college president, and was assured by the school's trustees that she would be a strong candidate for that position, particularly if she could improve the status of the business school.

The internal perception was that the business school had the potential to become a top regional program, but there was little history or reputation to back that claim. Davis decided that the best way to elevate the school's profile would be to secure AACSB (Association to Advance Collegiate Schools of Business) accreditation. The biggest hurdle to gaining this accreditation was to dramatically upgrade the level of intellectual contributions performed by the faculty. Because the business school's focus had been primarily on teaching, the faculty had previously not been asked to perform research, so the challenge would be daunting to some. Davis needed to develop a strategy that would get the faculty to embrace the research initiative without taking away from the teaching focus of the business school. The school desperately needed this accreditation to compete with top institutions in the area, but her efforts could result in backlash from the faculty, and severely damage her aspirations toward the school's presidency.

Case Objectives

This case is designed to be used in upper-level undergraduate business or MBA courses focusing on business strategy, particularly managing change. The case focuses on the Dean of the business school at a small liberal arts college who is trying to enhance the reputation of the school by seeking AACSB accreditation. The teaching objectives of the case are to (1) explore the different strategies for managing this type of change (2) examine the options that fit the faculty's needs (3) evaluate the possibilities for identifying resources and the difficulty in acquiring them, and (4) to analyze the Dean's strategies, as a woman, and how they may have differed had a man been in her position.

Contact Person: Melissa Kesling, Box 834, Queens University of Charlotte, Charlotte, NC 28274, melissakes04@yahoo.com

RUBY TUESDAY, 2007

Adam Koontz
Mary Kay Sullivan
Maryville College

Case Synopsis

Since its beginning in 1972, Ruby Tuesday had grown to be a successful player in the casual dining bar-and-grill segment of the restaurant industry. But in 2007, the market was over-saturated with very similar establishments and Ruby Tuesday found its sales and profits declining. Two years earlier management had begun a strategy intended to “re-image” the company as a higher quality restaurant with an emphasis on fresh foods. But sales continued to decline and stock price plummeted during 2007.

Ruby Tuesday faced strong competition in its segment and was struggling to decide how to improve its revenues and its profit margins. Should it continue efforts to aim for higher quality and higher price points or should it return to its traditional customer base?

Case Objectives and Use

This case provides the opportunity to examine strategies for achieving competitive advantage in a crowded and highly competitive industry. Once the original “bar-and- grill” casual dining in a “fun” atmosphere no longer served to difference Ruby Tuesday, the company tried several other methods of differentiating. It has now settled on a new strategy, that of differentiating through perceived higher quality. Restaurants now have a more modern, upscale look and the menu focuses on fresh, higher quality offerings. But the emphasis on quality and higher price represents a step away from its customer base. Is the company actually achieving the desired differentiation? How can it establish a competitive advantage?

The case is well suited for a course in Strategic Management and is an excellent example of how to—or how not to—establish competitive advantage. Porter’s Five Forces model and his generic competitive strategies are appropriate for analyzing the case.

Contact Person: Mary Kay Sullivan, Division of Social Sciences, Maryville College,
Maryville, TN 37804-5907, 865-981-8234, marykay.sullivan@maryvillecollege.edu.

THE SINGLE SANCTION

Amanda Long
Tara Kermiet
Susan Buckenmeyer
University of South Carolina-Columbia

Case Synopsis

A student (unnamed) on the Honor Committee listened to Michelle Carter's emotional closing statement during her honor trial and then followed her fellow "jurors" to the deliberation room. The jurors discussed what should be done about the case, but the Student stayed quiet. Many of the jurors thought that a serious honor violation had occurred, and that Michelle deserved a severe sanction. The Student was not so sure.

Case Objectives and Use

Based on field research, this case presents the dilemma of an unnamed student serving on an honor code tribunal in a university where enforcement of the honor code is the responsibility of students and the only sanction for a violation is expulsion. The case is most useful for initiating dialogue in an ethics course. The dialogue allows students to explore the obligations and responsibilities of loyalty to an organization and how they might conflict with justice for individuals within that organization. The case can also be used to explore the various types of honor codes used in universities.

Other uses of this case would be to orient judicial board members to their duties and obligations in judicial hearings and to train prospective student affairs professionals to deal with issues of academic integrity. The case is probably best used at the graduate level, although advanced undergraduates could also benefit from engaging in dialogue about the issues raised in the case.

Contact Person: Amanda Long, Department of Housing, University of South Carolina, Columbia, SC 29208, 803-777-4333, longag@gwm.sc.edu

NOT AGAIN

Elena Martinez-Vidal
Midlands Technical College

Michael F. Welsh
University of South Carolina

Case Synopsis

Interim department chair of humanities, Elena Martinez-Vidal, received a complaint from a student, Clare Wilson, about the language used in her Philosophy 115 class, Contemporary Moral Problems. The course was taught by an adjunct instructor, Dr. Joel Kennedy.

Elena was aware of similar complaints from students in Dr. Kennedy's Religion 101 class towards the end of last fall semester. At that time she talked to him about it as he left his classroom after class. He was surprised to hear about the complaints and promised to be more careful with the language he used in class. Elena had heard no further complaints and assumed the problem had been solved.

But about midway through the spring semester, Clare Wilson accompanied by her mother dropped by Elena's office with another complaint. She had tape recorded Dr. Kennedy's class and transcribed the offending language on a typewritten sheet that she handed Elena. She reads it in stunned silence, disgusted.

Case Objective and Use

This case is one in a series of cases prepared for use with faculty and staff preparing for leadership positions in the community/technical colleges in South Carolina. Specifically, the case provides an opportunity for participants in the higher education leadership program to consider freedom of speech and academic freedom issues in community college classrooms. The case has also been used in a doctoral level course on college teaching. There may be additional uses for the case in faculty development programs where a discussion on the limits of acceptable speech in the classroom is called for.

The case is based on field research and uses no disguises except for the names of the adjunct instructor and the complaining student.

Contact Person: Michael F. Welsh, Department of Educational Leadership and Policies, University of South Carolina, Columbia, SC 29208, 803-777-1017, mwelsh@gwm.sc.edu.

US GAAP OUT AND INTERNATIONAL STANDARDS IN- HOW SOON?

Robert McDonald
University of New Haven

Case Synopsis

The case takes us one year into the future when a corporate controller is writing a report to the board of directors outlining the benefits and costs of adopting international financial reporting standards (IFRS) for her firm. The case assumes the SEC has established a three year experimental or transitional period for converting US GAAP prepared financial statements to statements based on international standards. The controller must evaluate the tangible and intangible benefits and costs of early adoption of the international standards.

The controller is evaluating issues such as: over 100 countries allow or require international standards already; cost savings would be available for firms with foreign subsidiaries using international standards; the firm could appear more profitable under the international standards; investors could more easily compare the firm's performance to other competitors' performance if one standard is used in reporting; there will be specific costs of added audit fees and SOX compliance work; added training costs for accounting staffs; and added costs to file GAAP reports to non-SEC agencies, such as banks, which will continue to require GAAP numbers.

The SEC is moving much quicker to international standards than observers of financial reporting had ever anticipated. In September 2007 the SEC asked for comments on whether or not it should allow US firms to choose either GAAP or international standards to file their reports with the SEC. The case assumes that after the comment period ends in November 2007, the SEC will permit US firms to file reports using international standards for a three year experimental period.

Case Objectives and Use

The case will introduce the issues for which set of reporting standards will prevail. There is the definite possibility of GAAP disappearing within a 5 to 10 year period. The case is intended for an intermediate accounting or accounting theory course.

Contact Person: Robert McDonald, University of New Haven, 300 Boston Post Road, West Haven, CT, 06516, 2-3-932-7127, rmcdonald@newhaven.edu.

THE PRINCETON REVIEW: A DIFFERENT APPROACH TO COURSE STAFFING

Margie L. McInerney Mark Adkins W. Blaker Bolling
Dustin Holston Melissa Langford
Marshall University

Case Synopsis

The Princeton Review offers college entrance exam preparation courses as well as supplemental education services for grades K-12. Each regional operations center is responsible for staffing teachers for their various courses. The regional centers cover a large area containing several course sites. Teachers normally work in only one or two of these course sites.

This case will focus on the director of operations in Columbus, Ohio and her opportunity to propose changes in the current course staffing procedure. The objective of her proposed change is to increase the efficiency of staffing teachers for the upcoming schedule of classes. Unlike regular school teachers, Princeton Review teachers work after-school hours (Monday through Friday after 3:00pm). Since most teachers only teach one to two courses at a time, this increases the number of staff needed to meet the growing demand for these classes.

The current staffing procedure has teachers phone or e-mail course requests to the regional office at any time. This procedure has always caused problems such as: last minute schedule changes; delays in sending out course material to teachers; delays in course confirmations to teachers; and teachers without courses to teach. The director is also aware that two weeks before classes start she will have to begin a phoning marathon to find people available to teach “unclaimed” courses.

The proposed procedure would focus on sending city-specific e-mails that would list all courses available and would set specific time frames for teacher requests. Once a teacher calls in, the request would be logged into computer system. The staff member would immediately determine if the course has already been taken. Alternative courses could then be offered.

Case Objectives and Use

This case can be used in principles or strategic management course to demonstrate planning tools or operational staffing procedures. The case could also be used in human resource management to address staffing of contingent workers. The case allows students to consider scheduling of contingent workers – not full-time staff but people who frequently work for the firm. Scheduling of these workers have different issues since you cannot force them to work within your set schedule. Teaching notes and financial information will be available.

Contact Person: Margie L. McInerney, Division of Management/Marketing, Marshall University, One John Marshall Drive, Huntington, WV 25755. Phone: 304-696-2675, mcinerne@marshall.edu.

WYNDHAM WORLDWIDE CORPORATION, 2007

Sarah McPhetridge
Mary Kay Sullivan
Maryville College

Case Synopsis

Wyndham Worldwide Corporation became a free-standing corporation in 2005 and, under the leadership of CEO Stephen Holmes, had developed aggressive plans for international expansion. But the lodging industry was highly competitive and there were a number of competitors with deeper pockets and a longer history than Wyndham.

Wyndham had targeted U. S. retirees as a particularly attractive target market, even though growth in the over-65 population was slowing. Now Wyndham was beginning to focus on the group known as “Generation X”, U.S. and Canadians born in the 1960s and 1970s as well as international customers.

In 2007 Wyndham’s corporate portfolio included the Wyndham Hotel Group, with a variety of economy and mid-range hotel brands, as well as a vacation rental division (Global Vacation Network) and a timeshare division (Wyndham Vacation Ownership). There was a separate set of executives for each division. The company believed that this diversified portfolio helped provide a buffer to potential economic shocks in the industry.

The company’s goal of 33% growth in three years had met with mixed results in the financial community, with stock price increasing slightly from 2005 to 2007 until the company began a stock buy-back program. Some analysts questioned whether the Wyndham strategy of a diversified portfolio had resulted in a lack of brand awareness. Also, the growth strategy seemed quite aggressive. Was it time for a change of strategy?

Case Objectives and Use

This case is well suited to a Strategic Management course and would be good for conducting an external and internal analysis of a large, diversified corporation. The company’s portfolio strategy could be examined; does this achieve the desired risk reduction or does it serve to diminish the focus on brand name? Also, the case provides a good example of how financial strategy (in this case, share buy-back) can serve to make financial statements look good (increasing earnings per share) without actually resulting from improved profits

Contact Person: Mary Kay Sullivan, Division of Social Sciences, Maryville College,
Maryville, TN 37804-5907, 865-981-8234, marykay.sullivan@maryvillecollege.edu.

DOWN ON THE FARM

Rebecca J. Oatsvall
M. Tony Bledsoe
Meredith College

Case Synopsis

The Craddock family are longtime and influential members of their community in eastern North Carolina. The family has been engaged in farming for over two centuries and has expanded into land development, trucking, and, most recently, into international sales of used cars. These businesses are owned and managed by the three Craddock brothers.

This case describes the family structure and presents three major problems currently facing them: succession planning, farming problems and globalization. There is no succession plan in place, other than that the last living brother will be bought out by the other families. The farming operation is seasonal and farming over 5,000 acres requires the use of seasonal migrant workers, most of whom are immigrants. Many potential legal and ethical problems are associated with hiring, housing, and obtaining appropriate documentation for these workers. A new venture into global sales provides both opportunities and risks as the brothers decide whether they should continue to expand this and other global operations.

Case Objectives and Use

This case is intended for upper-level undergraduate business classes. It is particularly well suited for a course focusing on Entrepreneurship or Family-Owned Businesses. Students are presented with three very different problems, each of which have legal, practical and ethical implications. Students are provided with information about Ethical Decision Making Theories in an Appendix and are asked to apply these theories.

The three different problem areas are succession planning, employment of migrant workers and entry into the global marketplace. The instructor can assign all three problems or only a portion of them.

Contact Person: Rebecca J. Oatsvall, School of Business, Meredith College, 3800 Hillsborough St., Raleigh, NC 27607, 919-760-8484, Fax: 919-760-8470, oatsvallr@meredith.edu.

PARTNERSHIP THAT DID NOT MATERIALIZE: A CASE OF AN ASPIRING MEDICAL DOCTOR

Emmanuel Onifade
Gwendolyn McFadden-Wade
North Carolina A & T State University

Case Synopsis

This is a case of a young medical doctor who upon graduating from the medical school was faced with various issues, including the choice of accepting a position with a medical group of doctors with the hope of ultimately becoming a partner or pursuing a Fellowship or opening her own practice. He accepted a position with the group of doctors and because of unfavorable practice policies (management issues) and the probability that his dream might not be fulfilled in the company, he left company to venture into establishing his own practice. Then, he had to struggle with how to resolve the issue of the “non-compete” clause in his contract. He was faced with several other issues including how to finance his practice as well as the type of organization he should establish. He lacks an understanding of some of the characteristics of a partnership form of organization and his liability exposure as a result of his “passive partnership” position. His financing strategy also requires his need to understand the relevance of anti-kickback law as it impacts his financing arrangement with the hospital management. Once the financing was established and he has started his business, he was faced with the issue of whether to treat leased employees as his own employees or as someone else’s employees because the classification impacts his retirement contribution strategy. This case also relates to the tax implications of an individual’s participation in various seemingly related party companies and the proper classification of real estate construction costs and the distribution of profit or loss on the real estate rental property.

Case Objectives and Use

The objective of the case is to provide various scenarios suitable for teaching human resources and the related tax issues; to provide awareness of the difficulties in starting a small business with specific reference to medical practice; and to highlight the economies of collaboration and cooperation in physician’s practice. The objective is also to provide a teaching material for financing a company and the tax implications of the interwoven, related party companies established by the same investors and patronized by the same investors. Some parts of the case could be used in a Principles of Accounting or Intermediate Accounting classes. Some parts of the case could also be used in a class that teaches all forms of organizations and their tax implications (e.g., Partnership, S Corporation, LLP, LLC, and C Corporation). Some parts of the case could also be used in a Personal Finance course or Entrepreneurship course.

Contact Person: Emmanuel Onifade, Department of Accounting, 233 Merrick Hall, School of Business & Economics, North Carolina A & T State University, Greensboro, NC 27411, 336-334-7581 x 7020, Onifadee@aol.com or eoonifad@ncat.edu

LEE HERRON

Tanya Paul
Lindsey Morrow Hamil
University of South Carolina

Case Synopsis

What am I really teaching these students if I let them revise this exam?

Lee Heron is a veteran instructor and administrator at Southern Technical College. This semester she is faced with a dilemma while teaching a summer section of Reading 101. As she watches a student face a major personal and financial crisis, she struggles to decide what role her class and community college should take in terms of student support. Will altering her syllabus create a stronger learning community? Is she supporting learning or encouraging irresponsibility by allowing revisions to a test?

Case Objectives and Use

This case provides an opportunity to consider a number of issues encountered in the college classroom. The main character, Lee Herron, is a community college teacher and administrator. At the start of the semester, she is immediately faced with a student crisis while teaching a remedial reading course. When the student's personal life interferes with her academic future, Lee is forced to consider her role and the role of her institution in preparing students for life outside of academia.

The case, based on original research, was written for graduate students and/or faculty members working or studying in higher education or university administration. The case may be used as a part of pedagogy courses across many academic areas (i.e. education, English, and/or mathematics). The case presents opportunities to discuss issues surrounding course preparation, student support and remedial studies. It is also an excellent vehicle for those students and/or faculty considering careers in the community college system.

Contact Person: Lindsey Morrow Hamil, Doctoral Student, University of South Carolina, College of Education, 121 Dandelion Street, Summerville, SC 29483, 865-310-9081, lindseymorrow@yahoo.com.

DOLLYWOOD: GREAT PLACE TO WORK

Tim Redmer
Regent University

Case Synopsis

Dollywood: Great Place to Work is a critical decision case involving Morgan Duckworth, the Champion of the Great Place to Work: Work Satisfaction and Environment Committee at Dollywood theme park in Pigeon Forge, Tennessee. This case accurately reflects dilemmas frequently faced by the committee in identifying worthy projects but having to deal with limited financial resources.

Dollywood, as a corporation, is greatly interested in providing a supportive environment for its employees (hosts). Actions like the Great Place to Work Committee along with additional benefits and perks offered to employees are evidence of this policy. Hosts universally have expressed their loyalty and support to Dollywood and are satisfied employees. The case identified many situations where employees expressed their complete support of actions taken by the company to enhance the quality of the work environment.

Morgan has identified several projects which would continue to provide for an improved working environment, but he and the committee are limited by a finite level of financial resources. His decision dilemma is to somehow rank the projects and determine which can be completed during this next budget year within the financial constraints.

Case Objectives and Use

This case provides the user with a situation where a budget process is in place which encourages the company employees have the opportunity to recommend and prioritize projects which will directly benefit them and the work environment. Students will be placed in the role of the Great Place to Work committee and allowed to review proposed projects and make a recommendation to management within the limitations of the budget constraints.

The case, based on an actual business and using primary data obtained through field research and on-site interviews, can be used in a finance, or managerial accounting class at the undergraduate level that covers the topic of budgeting or alternative choice decision making. The information presented is relatively straightforward, and there is a clear decision point. There are sufficient extenuating circumstances to make for a good discussion of critical factors in this type of decision analysis.

Contact Person: Tim Redmer, School of Global Leadership and Entrepreneurship, CRB 117, Regent University, 1000 Regent University Drive, Virginia Beach, VA 23464, 757-226-4360, timored@regent.edu.

DINNER THEATRE: GIFTS OF THE MAGI – WOULD THE GIFT BE GOLD OR COAL

Tim Redmer
A. Gregory Stone
Regent University

Case Synopsis

Jefferson Ledgerwood, a new member of SIFE, was confused! After all, he had already been a successful business man! This was a chance to establish a revenue stream for the organization which was horribly dependent upon the university to make ends meet. However, the SIFE president wanted no new projects, no new events, and would not approve of the venture. At the same time, the school dean wanted its students to take entrepreneurial risks – taking action on an idea was seen as more critically positive a decision than its ultimate success or outcome.

Jefferson still saw the venture as a way to bridge the gap between the theatre department and the business school, plus the Founders Inn wanted additional business during their off days and times. The theatre department had already balked at the idea of adding a Christmas play to their lineup of events, so there was no “competition.” And the community expected something with a Christmas theme to come out of the university. There was an opportunity staring him right in the face that could be a win/win/win!

The dilemma is how to make the venture profitable with the first performance in less than 60 days. There is a pricing issue for tickets, cost issue with fixed and variable costs, and the “yours, mine and ours” marketing concerns. How could they quickly promote the event and get the required minimum number of people to attend. They could probably cover the meal costs, but what about the “complementary” tickets that could win friends and influence people for the future of the event? Breakeven seemed to be a moving target!

Case Objectives and Use

This case provides the user with an entrepreneurial situation where a quick decision is required. Typical issues facing an entrepreneur such as pricing and a breakeven analysis, operational issues, marketing strategies, and leadership especially in getting all parties to “buy in” to the project are evident. The project has a distinct time frame for decision purposes and with the SIFE connection is student friendly case scenario.

The case, based on an actual decision situation and using primary data obtained through field research and on-site interviews, can be used in an entrepreneurial or general management class. The information presented is relatively straightforward, and there is a clear decision point. There are sufficient extenuating circumstances to make for a good discussion of critical factors in this type of decision analysis.

Contact Person: Tim Redmer, School of Global Leadership and Entrepreneurship, CRB 117, Regent University, 1000 Regent University Drive, Virginia Beach, VA 23464, 757-226-4360, timored@regent.edu.

CLAYTON TOOL COMPANY

C. Michael Ritchie
Kathleen W. Wates
University of South Carolina Aiken

Case Synopsis

Clayton Tool Company was established in 1989 and remains as a wholesaler for industrial fasteners. The company reported 2006 sales of \$ 7,169,034 and \$ 1,835,048 in net income. Clayton Tool was founded by Stan Clayton, who continues as the company's President and owner. Clayton Tool provides industrial fasteners (nuts and bolts) primarily to production facilities within the southeastern United States.

After a humble beginning, the increased demand in the manufacturing segment, along with Clayton's vibrant personality, ushered in a period of expansive growth. In 1998, Bill Withers joined the firm as Vice President and principal partner.

Stan Clayton and Bill Withers had been friends for years. They were also successful business partners. Their respective business strengths complemented each other and had provided the avenue to their success. They believed that there was nothing that could come between them and their business or friendship. However, something did. It was family. The many years of friendship and business relationship were now threatened because of the son of Stan Clayton. What solution could they possibly find? How could they continue as if nothing had changed? These questions plagued both partners as they struggled to find a solution. After everything they had been through, how had it come to this? Stan Clayton was at his wits end. He had worked hard all his life and been very successful. Stan had figured out the market, the product, the customers, and the financial side of business. What he had no idea about was how to tell his partner, not to mention his best friend, that he was fired. And to make matters worse, his best friend just happened to own 50% of the business.

Case Objectives and Use

This case is appropriate for an Organizational Behavior or Principles of Management class.

Contact Person: C. Michael Ritchie, School of Business Administration, University of South Carolina Aiken, 471 University Parkway, Aiken, SC 29801, 803-641-3228, Fax: 803-641-3445, michaelr@usca.edu.

HARLEY-DAVIDSON, 2007

Stephen Shankles
Mary Kay Sullivan
Maryville College

Case Synopsis

From humble beginnings in a wooden shed in Milwaukee in 1903, Harley-Davidson had grown into a motorcycle icon with a loyal following of riders that sometimes verged on the fanatical. Annual gatherings of Harley riders drew tremendous crowds and some customers went so far as to bear Harley tattoos. The company built on this loyalty by starting the Harley Owners Group (HOG) in the 1980s; by 2007 the group numbered over a million members. This network allowed the company to both disseminate information and receive customer suggestions while allowing bikers to “share their passion and show their pride.”

In its long history, the company had surmounted many serious challenges, among them a surge in competition from foreign makers of motorcycles in the mid-twentieth century. An unfortunate buyout by AMF further weakened the company. Another problem was the image in the press and in movies of Harley bikers as lawless and tough. But the company had always emerged victorious; even the “bad-boy” perception of Harley riders had been turned into a marketing advantage.

But in 2007 Harley faced new challenges. Foreign competitors were taking advantage of new technology and changing the competitive scene through greater efficiencies. Also, Harley’s customer base was aging and the company seemed to be in danger of losing its cachet. How could Harley keep up with changing times and technologies, yet maintain the classic image that had served it well?

Case Objectives and Use

Harley-Davidson can be used both in a course in Strategic Management for an industry analysis and differentiation strategy and also in a Marketing course as an example of positioning the company through lifestyle marketing. The almost cult-like following of Harley customers provides suggestions as to how a company can build on a highly differentiated perception of its product. The Harley Owners Group is an excellent example of a marketing tool that helps foster a sense of camaraderie among members while providing the company with useful information about bikers and their needs.

Contact Person: Mary Kay Sullivan, Division of Social Sciences, Maryville College, Maryville, TN 37804-5907, 865-981-8234, marykay.sullivan@maryvillecollege.edu.

HARNESSING THE TECHNOLOGY OF THE PACKAGE DISPATCH SYSTEM (PDS) WITHIN THE LAUREL MOUNTAIN DISTRICT

Dale H. Shao Blaker Bolling James S. Dalton
John Lucas Danny Chandler
Marshall University

Stephen P. Shao, Jr.
Tennessee State University

Case Synopsis

In 2003, Computerworld magazine ranked UPS number 20 on the 2003 list of “Best Places to Work in IT,” and they ranked among the “50 Best Places for Minorities” for the fifth consecutive year by Fortune magazine. UPS also unveiled the DIAD IV, a new generation of wireless, handheld computer for service providers. UPS drivers are not required to fully utilize the DIAD IV system and because UPS is a union company, drivers are hesitant in adopting new systems that they feel might cause them a loss in job structure.

During July 2004, the Laurel Mountain District went live with the Packages Dispatch System (PDS) to remain ahead of its competitors in the industry and increase the growth of production while reducing mileage, service failures, and cost of training from turnover. The role of the Package Dispatch System (PDS) is to manage and control dispatch throughout the preload operation. Because of limitations in current forecasting models, the PDS does not give the most accurate readings on the forecasted volume each day. The purpose of the PDS is to utilize tools available which identify dispatch improvement opportunities that impact services, increase density and reduce miles with respect to ground deliveries, next-day air deliveries, and pickups. In addition, the system is designed to improve area trace to prevent drivers (or service providers) from overlapping each other’s territories. The PDS system has been a relative success.

UPS is the world’s largest package-deliver company, delivering over fifteen million packages and documents each day to destinations all over the world. The company faces competition from FedEx Corporation and DHL. DHL is its biggest foreign market competitor, while FedEx is its largest direct rival. Together, UPS and FedEx command nearly eighty percent of the U.S. parcel market.

Case Objectives and Use

This case provides a unique opportunity to address how a firm must evaluate its strategic plan to deal with one large domestic market competitor and one large foreign market competitor. The firm must ask questions such as whether there is anything else they can do to maximize and maintain their market share. The case is based on an actual company and is relevant to strategy, global topics, ethics, IT infrastructure, marketing, and e-Commerce courses, as well as other related courses. This case is relevant to undergraduate and graduate courses.

Contact Person: Dale H. Shao, Lewis College of Business, Marshall University, One John Marshall Drive, Huntington, WV, 25755, 304-696-2685, shoad@marshall.edu

QUALITY CUISINE TO GO

William L. Shelburn
Marsha R. Shelburn
David Harrison
University of South Carolina Aiken

Case Synopsis

The main character in the case decided to leave a secure position in the investment field to pursue the dream of owning a restaurant. She moved to a much smaller town to escape the noise and congestion of a large city. She thought the combination of a unique restaurant in that location and an emphasis on healthy low calorie food would ensure the success of her business. After almost two years of operation the restaurant was still not profitable. She is faced with the question of what to do to make the business a success.

Case Objectives and Use

This case is an opportunity to examine the steps that go into starting a new business. Particular emphasis is placed on the importance of doing proper market research before selecting a location for a business. The identification of a target market and how to properly appeal to it is also addressed. This case is based on an actual business and was written for an undergraduate course in Marketing or Marketing Research. It can also be used in a Small Business Management course to illustrate the problems of starting a business.

Contact Person: William L. Shelburn, University of South Carolina Aiken, 471 University Parkway, Aiken, SC 29801, 803-641-3233, billsh@usca.edu.

MULLINS HARDWARE

Hendrikus E.J.M.L. van Bulck
University of South Carolina Sumter

Case Synopsis

Mullins Hardware is a in a small-town hardware store in New England, founded by Ed Mullins founded during the 1930s. The pre world-word II years were hard, but the business began to prosper in the 1950s when much business still came from local farmers. Working-class families in town were mostly employed by a local steel mill and two textile mills. By 1950, the industries prospered, and the town grew. New neighborhoods developed, small shopping centers were built along with new schools, restaurants and supporting infrastructure. The urban expansion brought prosperity to the hardware business.

Gene joined the family business in 1972. He loved the hardware business. He had learned hardware merchandising from his father and he was able to apply much of his business education in running the business. In 1984, Ed Mullins retired and he gave Gene a forty percent ownership interest. Gene became the general manager.

The store still had all the characteristics of a small-town hardware store. It sold various fasteners, hinges, locks and keys, general kitchen and household wares as well as gardening tools and farm supplies. During the 1950s and 1960s, Mullins hardware added electrical contracting supplies, plumbing supplies and miscellaneous small tools to the product lines.

By the early 1990's, the Town's economy had changed. By 1998, both of the textile plants were closed. The steel mill went bankrupt in 1999. While the Town had lost much of its traditional industrial base, new jobs have been created in other economic sectors. Gene realized that he had to reposition his business to adapt to a new economic reality, which included a large national home improvement center and a general merchandise superstore.

In 2002, Gene built a new, large, modern store. He was convinced that, although burdened with debts, this store could succeed in the new competitive environment. His new store not only offered traditional household and hardware goods; it also included large outdoor recreation and gardening departments. Although sales have grown as projected, Gene is now facing critical cash flow problems. He needs to quickly determine the reasons for his problems and he wants to know if he should restructure his invested capital.

Case Objectives and Use

The objective of this case is to illustrate how financial ratio analysis and benchmarking can be used to assess the financial health of a small business. The case also points to the interrelationships between marketing and financial management. The case includes a history of the family business and a three-year summary of the hardware store's financial position. The case also provides benchmark data, sales projections and financial ratios.

Contact Person: Hendrikus E.J.M.L. van Bulck, Division of Business and Economics, USC Sumter, 200 Miller Road, Sumter, SC 29150, 803-9383895, vanbulck@USCSumter.edu.

PASSING THE TORCH OR TORCHING THE PAST?

Fred A. Ware, Jr.
Valdosta State University

Case Synopsis

Approaching retirement, the main character feels that foundation course content material, vital in his mind to the wherewithal of his academic discipline, has been gradually dropping out of the introductory course in his business school where he is now dean. Communicating this concern to junior faculty draws a blank plus the non-verbal insinuation that their leader is behind the times. Rationale is presented reflecting on the long-term impact of the accrediting agency on course topics as well as the significance of the academic job market on doctoral specialization over the last 37 years. Conversely, the dean wonders if older faculty members are ignoring current theories. The department head believes in delegating text selection and syllabi development to those who teach the particular subjects, whereas the dean is anxious to intervene in the process. A junior instructor concludes that rather than switching texts, it would be much easier to just add in some of those old fundamentals to his lecture notes.

Case Objectives and Use

This case provides aspiring educational administrators with a scenario to consider several issues: (1) The possibility of course content degradation over time with various causes and potential negative consequences; (2) The impact of impending retirement of faculty, including motivational considerations and the preservation of otherwise lost pedagogical techniques (3) Encouragement for administrators to be proactive, not allowing external pressures to override responsibilities to student and practitioner constituents.

Contact Person: Fred A. Ware, Jr., Department of Management, Valdosta State University,
1500 N. Patterson Street, Valdosta, GA 31698, 229-245-2244,
fware@valdosta.edu.

HEWLETT PACKARD, 2007

Daniel Wilder
Mary Kay Sullivan
Maryville College

Case Synopsis

A changing of the guard at Hewlett Packard had brought a change in corporate culture. Back in the early days of this manufacturer of computer and computer peripherals, the founders, Bill Hewlett and Dave Packard, stressed the need for trust in and respect for employees as the backbone of the business. The “HP Way” as envisioned by the founders was based on the idea that employees intrinsically wanted to do good work and make a contribution to the company. This assumption became the foundation of the company and resulted in a family-like atmosphere. The HP Way became enshrined in the corporate culture and was passed on to decades of employees

But the retirement of the founders in the 1980s brought a change in leadership. The two immediate successors, John Young and Lewis Platt, had come up through the ranks in the company and were imbued with the HP Way. But an outsider, Carly Fiorina, was brought in as CEO in 1999. She effected a controversial merger with Compaq Computer and ran the company with a more aggressive leadership style. After her ouster in 2005, another new CEO without Hewlett-Packard ties, Mark Hurd, took charge. His stated intent was to pursue innovative, cost-effective products.

In spite of past leadership turmoil, in 2007 Hewlett Packard seemed to be doing well financially and stock price had more than doubled since Fiorina’s departure. But competition from IBM and Dell was looming large. Would the HP Way help carry the company through difficult competitive times?

Case Objectives and Use

Hewlett Packard could be used effectively in either a course in Organizational Behavior or Strategic Management. For the former, an analysis of “The HP Way” would fit well with a course section on organizational culture. The underlying premise of the HP Way is much the same as the assumptions of Douglas McGregor’s “Theory Y” and would be an appropriate example of this in the workplace.

In a Strategic Management course, Hewlett Packard could be used in an industry and general environment analysis, in particular as an example of how changing technology greatly impacts a company and its industry. Also, the concept of strong corporate as a source of competitive advantage is found here. Acquisition as a strategy could also be explored.

Contact Person: Mary Kay Sullivan, Division of Social Sciences, Maryville College,
Maryville, TN 37804-5907, 865-981-8234, marykay.sullivan@maryvillecollege.edu.

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