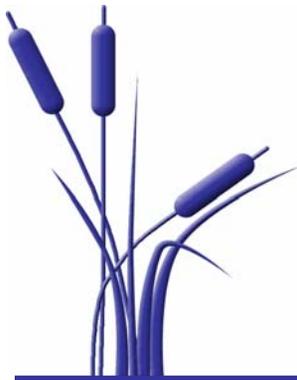




*Proceedings*  
*of the*  
*Fourteenth Annual Meeting*  
*February 16-18, 2006*

**Editor**

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



*Ocean Reef Resort*  

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*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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Papers & Symposia	Michael Ritchie	University of South Carolina Aiken
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## From the Proceedings Editor

Dear SECRA Colleagues:

You will notice that the Fourteenth Annual SECRA Meeting Proceedings contain 70% more cases, papers, or plenary sessions than last year. I am not exaggerating when I state that it has been both interesting and exciting to serve as your SECRA Proceedings Editor and Program Chair this year. In particular, I quickly discovered the need to structure the proceedings differently. This is largely attributable to the diversity of topic areas found in this year's cases. Thus, I'll devote the remainder of this note to the organizational scheme I have chosen.

First, we had many submissions fall into just a few of our published tracks. Thus, I saw little utility in organizing the contents by track. Instead, I decided to offer a case and topic matrix to indicate the various areas represented in each case. Because I had to make some judgment calls, I apologize if you feel that your case was omitted from an essential category or inappropriately included in another. If we find the matrix approach helpful enough to include it in future proceedings, then we can solicit this type of assessment from authors during future calls for cases. In any case (no pun intended!), I hope that you'll find this matrix useful in determining the nature of each case.

Next, I chose to list the contents alphabetically by author. I believe that this more quickly gives you the credit due for your hard work in delivering a case to the SECRA meeting. The contents are also structured according to the following three major categories: cases, papers and plenary sessions, and embryo cases. The proceedings are also supported by an index.

Finally, 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 any full cases that were submitted in time for the CD publication deadline. I would certainly like to see this CD become the norm for our SECRA Proceedings. It precludes the cost of printing full cases in the proceedings, yet still allows us to have a hard copy of the proceedings accompanied by full cases on CD and eventually instructor manuals. The electronic version not only offers us more, it also gives us the ability to electronically search through SECRA cases. In the future we could provide more advanced indices for greater search capabilities.

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.

Thank you for the opportunity to serve.

Sincerely,



*Mick Fekula, SECRA Proceedings Editor—2006*

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

<i>Chi Anyansi-Archibong</i>	<i>North Carolina A&amp;T State University</i>
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<i>James W. Carland</i>	<i>Western Carolina University</i>
<i>JoAnn C. Carland</i>	<i>Western Carolina University</i>
<i>Janet L. Dye</i>	<i>University of Alaska Southeast</i>
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<i>Louis I. Nezegwu</i>	<i>University of Wisconsin – Platteville</i>
<i>Carl R. Ruthstorm</i>	<i>University of Houston – Downtown</i>
<i>Linda K. Swayne</i>	<i>University of North Carolina – Charlotte</i>
<i>Marilyn L. Taylor</i>	<i>University of Kansas</i>
<i>Isaiah O. Ugboro</i>	<i>North Carolina A&amp;T State University</i>

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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
Picture Fixers, Inc. (p. 1)	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Tanning Salon Customers Get Burned (p. 2)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>						
McDonald's Corporation: A coffee spill for the ages!!! (p. 3)		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
Charlotte Bobcats – A Wedding, But No Honeymoon (p. 4)		<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
The Cabell Huntington Hospital Regional Pain Management Center (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"/>				<input checked="" type="checkbox"/>
Bound for Extinction (p. 6)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
Just One More Year (p. 7)							<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
The Emperor's Club: An Ethics View (p. 8)		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Julia Lewis (p. 9)				<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
If You "Re"-Build It, They Will Come (p. 10)		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
ControlSys (p. 11)							<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
Small Scale Changes and Large Scale Impacts (p. 12)						<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
Promoting a Bakery in Good Times (p. 13)					<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
GEAR UP Summer Camp and Community Partnerships (p. 14)		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>											<input checked="" type="checkbox"/>	
Shawnee Hills (p. 15)						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
Modern Medical, Inc.: Market Expansion in an Environment of Low Employee Morale (p. 16)						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
Whose Hand Was in The Cookie Jar? (p. 17)	<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
<b>Krispy Kreme Doughnuts, Inc. (p. 18)</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>											<input checked="" type="checkbox"/>
<b>E. W. Scripps Company, 2005 (p. 19)</b>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>												<input checked="" type="checkbox"/>
<b>Libby Brown (p. 20)</b>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>				
<b>Chapter Three (p. 21)</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>										<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
<b>Polysty - Molding Machine Acquisition (p. 22)</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>											<input checked="" type="checkbox"/>
<b>Sandhills Investment Company (p. 23)</b>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
<b>The Morton Hotel (p. 24)</b>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
<b>CELBLOX Marketing Strategy (p. 25)</b>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
<b>Jabo Supply Company: Marketing Audit – A Valuable Tool (p. 26)</b>										<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
<b>Recovery Prior to Succession: A Case Study of a Family Business Facing Unexpected Turmoil (p. 27)</b>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>
<b>A Family Business Successor Considers Quantitative Methods (p. 28)</b>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
<b>Ethics Codes in Academic Organizations: The Case of the Academy of Management Code of Ethics (p. 31)</b>					<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>			
<b>The Importance of Capitalizing on the University Experience to Enhance Students’ Workforce Marketability (p. 32)</b>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
<b>National Board Certification: Does It Improve Teaching? (p. 33)</b>				<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	



# CASES

## PICTURE FIXERS, INC.

Elizabeth C. Alexander   W. Blaker Bolling   Stacie Locke  
Justin Matthews   Chris Salinica  
*Marshall University*

### Case Synopsis

Picture Fixers originally started business as The Final Touch, a photo retouching service. As the firm's offerings increased to include restoration, the name was changed to Picture Fixers. The firm's customer base expanded from just local photographers to clients across the US and Canada. Investments were made in computer systems allowing exceptional product quality.

Technological advancements (digital cameras) soon allowed Picture Fixers' clients to complete their own retouching work, leading to a decrease in business for Picture Fixers. A few dedicated customers remained.

Picture Fixers faces a decision: a) downsize in equipment assets and employees in response to the technological changes in the environment, b) find new sources of revenue, utilizing the equipment/employee assets already owned, or c) invest in additional equipment to provide more services for professional photographers.

### Case Objectives and Use

This case describes the history and current concerns of an actual business and would provide a good example of external environment change and impact for undergraduate marketing and strategy classes. Student discussion could focus on marketing issues like external environment monitoring, target market changes, expansion through new markets and/or products, and the marketing of services. Strategy students could also discuss the impact of changes in the external environment, as well as financial issues facing managers.

---

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# TANNING SALON CUSTOMERS GET BURNED

Joyce M. Beggs  
I. Edward Jernigan, III

*University of North Carolina at Charlotte*

## Case Synopsis

Ann Brown received a phone call late Sunday night from the owner of the Sunny Beach Tanning Salon, Sandra White. Sandra told Ann that the salon would be permanently closed as of Monday. Ann had worked at the shop for 12 years and was totally surprised by this announcement. Of course, Ann worried about her employment situation and certainly regretted buying a new car last week. She was also concerned about how the loyal customers would react. On Saturday, Ann sold several one year unlimited tanning memberships. Ann questioned Sandra how things would be handled on Monday. Sandra told her not to worry that everything had been taken care of. However, Ann had trouble following that advice. Most of the customers did not know Sandra, and some thought Ann owned the shop. Questions raced through Ann's head: Would customers blame Ann? What should Ann do? What could Ann do?

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

## 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 Introduction to 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.

---

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# **MCDONALD'S CORPORATION A COFFEE SPILL FOR THE AGES!!!**

Raphael Boyd  
*Clark Atlanta University*

## **Case Synopsis**

A “vibrant” 79-year old grandmother suffered severe third-degree burns from spilling a cup of recently purchased coffee on to her legs from a McDonald’s restaurant. She sued McDonald’s. After the trial, the jury returned a verdict of \$2.9 million dollars.

This was a highly publicized legal case that involved the legal concept of product liability. It will examine the concept of product liability as well as the various defenses and responses necessary to counter the product liability allegation.

This case has a component, which will require students to make decisions and recommendations concerning public policy. For some, it represents the need for major Tort reform within the United States to stop frivolous lawsuits. To others, it represents what happens when corporations become arrogant and neglects to take care of its customers. In addition to the law, students will be required to assess and comment on the political, corporate, and emotional aspects of this case.

This case has been based on a lawsuit filed against McDonald’s Corporation by an elderly woman in the U.S. District Court for the Northern District of Illinois, Eastern Division. Certain names and places have been altered in this case. Although this case may be applicable in a number of legal courses, it is highly recommended for graduate Business Law courses and undergraduate Business Law I courses.

## **Case Objectives and Use**

This is an informative and interesting case that examines traditional and emerging legal concepts concerning product liability. The first objective of this case is to heighten student awareness concerning the current legal and emotional difficulties involving product liability lawsuits. The second objective is to provide students with a basic understanding of product liability 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.

---

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# CHARLOTTE BOBCATS – A WEDDING, BUT NO HONEYMOON

Bradley W. Brooks

Timothy E. Burson

*Queens University of Charlotte*

## Case Synopsis

The Charlotte Bobcats started play as an expansion team in the National Basketball Association (NBA) in November 2004. The arrival of a professional sports franchise is typically a major event in a city, and the team is welcomed and embraced. This could be considered a marketer's dream, as sports fans in that city will eagerly support the team – win or lose – simply because the team is there. This “honeymoon” period can last for several years, a formative period where the team can acquire and develop more talented players. At the end of the honeymoon, the team should have developed to the point where it can be marketed as a rising team, ready to compete for a spot in the playoffs and, ultimately, the NBA championship.

There was no such honeymoon for the Bobcats. Charlotte had a previous expansion team, the Hornets, which moved to New Orleans in 2002, after playing fifteen seasons in Charlotte. The Hornets did have the standard honeymoon, but the fans gradually fell out of love with the Hornets as a result of dubious personnel decisions, personal problems of the primary owner, and a bitter fight between team ownership and the city over construction of a new arena. When the Hornets left town, the popular sentiment among Charlotte sports fans was general indifference. The announcement of the Bobcats creation did little to restore the enthusiasm of the local market. This atmosphere created a significant challenge for the marketing staff of the Bobcats. They needed to formulate a plan to re-energize the city of Charlotte, to recapture the energy and excitement that once existed in the Charlotte sports market for NBA basketball.

## Case Objectives and Use

This case study is designed for both graduate and undergraduate courses in Consumer Behavior, in Sports Marketing, or in Promotions Management. Within the Consumer Behavior or Promotions Management courses, it is particularly valuable in discussing customer attitude and attitude change techniques. Within any of these three courses, the case is particularly helpful for illustrating a positioning approach for bring a new brand (in this case a professional sports team) into a saturated marketplace and differentiating that positioning against a negatively perceived brand that has since dropped out of the local marketplace.

---

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# THE CABELL HUNTINGTON HOSPITAL REGIONAL PAIN MANAGEMENT CENTER (CHHRPMC)

Christopher M. Cassidy, *Marshall University*  
Ahmed (Ozzie) Ozturk, *Medical Director of the CHHRPMC*  
W. Blaker Bolling, *Marshall University*

## Case Synopsis

This case asked the general question, “How should the physicians and managers of the CHHRPMC have structured their medical practice, from the standpoint of a business, to create the greatest amount of well being for their stakeholders?” The Operating Suite in Cabell Huntington Hospital (CHH) was busy with patients waiting for surgery. The anesthesiologist on call was tired and weary in his sweaty scrubs. His pager buzzed incessantly, calling him to the OR and to the recovery room. He knew that there was a patient in the holding area, referred by an orthopedic colleague, waiting for an epidural injection. He realized that if he performed the epidural he wouldn’t be able to cover the OR, which was his primary duty. Isolated scheduling conflicts were only one problem that needed attention.

Another problem was the process of scheduling of referrals for epidural pain blocking. Each epidural paid an average of \$300 for facility fees across the insurance groups, including Medicaid, and CHHRPMC received 3-5 referrals per week. If scheduled randomly across the week, the revenues generated from epidurals wouldn’t cover the costs of resources, personnel and facilities. Yet this was a necessary and vital procedure for patient well being. What could the CHHRPMC have done to ensure the procedure was provided without putting the CHHRPMC at risk?

These and other situations dealing with the allocation of scarce medical resources and human talent in a market with voracious medical consumers and third party payers were some of the strategic decisions faced by the physicians and managers of the CHHRPMC. The mission of the CHHRPMC is to provide the best diagnostic and therapeutic pain management in the Tristate region in an individualized, multidisciplinary fashion with the intent of returning patients to their maximum level of physiological, psychological, social, and vocational function.

## Case Objectives and Use

This case was based on an actual organization and could be used at both the undergraduate and graduate levels in courses involving strategic management, operations management, human resources, marketing, finance, or health care administration. The class discussion should involve the students in recognizing the relevant features of the medical industry, the nature of human capital, and services oriented businesses.

---

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# BOUND FOR EXTINCTION

Juanita Colman, *Tri-County Technical College*  
Michael F. Welsh, *University of South Carolina*

## Case Synopsis

Maia Roberts was the admissions and recruitment leader for Midstate Community College and had become increasingly concerned about prospective students' negative response to the reception they receive when visiting the architectural technology department. She also discovered that an increasing number of students enrolled in the program were withdrawing. After talking to the students she learned that the lead instructor in the program thought that most, if not all, students entering the program were unprepared and not capable of pursuing the program. Further, his lack of personal relation skills drove students out of the program. Worried that the program was bound for extinction, Maia wondered how she might intervene.

## Case Objectives and Use

College admissions officers serve as “border spanners” in that they interact with people outside the institution as well as those within. From this vantage point, they see how activities and behaviors within the institution affect those on the outside and *vice versa*. Often they are the first to pick up on problems within the institution that need to be attended to. The dilemma they face is whether to explain away (or cover up) the problem as they recruit new students or to confront the problem and risk losing the trust and respect of campus faculty. The case is based on field research and was developed to initiate dialogue among graduate students or practicing administrators who are preparing for leadership positions within community colleges. The names and some peripheral facts have been disguised to protect confidentiality.

This case is best used with graduate students in higher education administration or student affairs programs or with community college administrators in executive or professional development programs.

---

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# JUST ONE MORE YEAR

Steven M. Cox  
*Meredith College*

## Case Synopsis

“Just One More Year” is a case describing a common problem between sales people and their managers. Sales people are, by their nature, optimistic, while sales managers are driven by the numbers. In this case, the sales person responsible for all sales in Africa is about to miss his sales commitment of \$1 million for the second straight year, yet he is confident that he will be able to make it the next year. His sales manager is not convinced that the market in Africa will grow sufficiently within the next year.

Not wanting to invest additional funds in a losing market, the sales manager has suggested that the sales person move to the technical position he occupied before being reassigned to sales. The salesperson refuses and writes a memo justifying his belief in the African market. The memo is copied to the President of the company. The sales manager has now been asked to write a report to the President justify his decision concerning the African market and Frank Dibbs.

## Case Objectives and Use

This case is intended to get students involved in the process of managerial decision making. It can be approached from the perspective of HRM, management, marketing, organizational behavior, and strategic management.

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## THE EMPEROR'S CLUB: AN ETHICS VIEW

Michael J. "Mick" Fekula, *University of South Carolina Aiken*  
Matthew W. Hallgarth, *United States Air Force Academy*

### Case Synopsis

This case is based upon the movie production of *The Emperor's Club*. The story takes place in the context of a boy's school in the early 1970's. For analysis purposes, please interpret the use of "boy" or "man" as "person." Mr. Hundert is a teacher of the great classics from antiquity, which are defined as the standards, timeless models, and ideals for how we should live and live together. He believes that *it is a teacher's burden always to hope, that with learning, a boy's character might be changed . . . and, so, the destiny of a man*. His students listen attentively as he expounds with statements and questions like, *Great ambition and conquest without contribution is without significance. What will your contribution be? How will history remember you?*

On one particular day, Sedgewick Bell, a new student arrives in Mr. Hundert's class. Bell immediately challenges Hundert's precepts, thus revealing his youthful disdain for conscience and a respect only for winning. Hundert's attempts to mentor young Bell propel him into an ethical dilemma. Despite his willingness to help through an errant compromise, Hundert's efforts are thwarted by a recalcitrant Bell. As the years pass and graduation arrives Hundert is left only to remark that *With a profound sense of failure I handed him his diploma*.

Twenty-five years later, Bell literally sets a stage to recapture his honor just prior to announcing his bid for the U.S Senate. Hundert is greatly encouraged by Bell's magnanimous show, but soon learns that little has changed in Sedgwick Bell. This is a story about ideals versus the harsh reality of existence.

### Case Objectives and Use

The main objective for using this case is to lay the groundwork for discussing a variety of issues regarding ethics. In particular, a 14-year old boy is used to pose the obvious question, Why be ethical? Although that particular question is never answered in the film, the case illustrates a more critical aspect of ethics. From the Aristotelian perspective, it is not enough to do no wrong, one must also pursue excellence. The argument is that ethics is about living well and living well with others. This case has applications in Business and Society, Ethics, Organizational Behavior, and Social Science courses. The context of the story also lends itself to use in the discipline of education.

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## **JULIA LEWIS**

Stephanie M. Foote

*University of South Carolina Aiken*

### **Case Synopsis**

Julia Lewis was a new instructor teaching SSS 101, Student Success Seminar, for the first time at Northern University. Having lived her entire life in the South and having some difficulty adjusting to her new surroundings, she worried that she may not be able to relate well with her students who seemed so different. She decided to use the first day of class to build a sense of community among the students. Her first exercise was the name game where students could learn each other's names and an interesting fact about each other. The game began slowly as students were reluctant to get involved. Within minutes the game had turned into a fist fight between two male students. Julia dismissed the class. Julia wondered how this could have happened and what she would do when the class met again.

### **Case Objectives and Use**

The first day of class is probably the most important time in the life of a class. That is the time that formal and informal contracts are communicated and negotiated. This case provides a situation in which a new instructor is faced with an ugly incident that can set the tone of how classmates will behave toward one another during the remainder of the semester. 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.

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# IF YOU “RE”-BUILD IT, THEY WILL COME

Martin J. Hornyak  
C. “Wynn” Teasley III  
*University of West Florida*

## Case Synopsis

The *Pensacola News Journal* headlines read “Ivan Roars Ashore,” “Nightmare,” and “Devastating” in September, 2004 (Pensacola News Journal, 16, 17, & 18 September 2004).

Hurricane Ivan struck Northwest Florida and Lower Alabama as a Category 3 hurricane with winds of 140 mph and with wind gusts of 100 mph hitting downtown Pensacola. Ivan’s effects will linger for years, even decades, after physically reshaping much of Florida’s Escambia and Santa Rosa counties and the lives of the people who lived there then, now, and in the future.

How can an entire geographic region be put back together after such devastation? Enter Rebuild Northwest Florida (REBUILD), a public/private partnership created to coordinate need-based recovery efforts for these two counties. Why and how was this organization put together? What is being accomplished by this organization? Is REBUILD meeting its mission? What does the future hold for the REBUILD organization and the Northwest Florida area? These questions and others still need to be answered as Northwest Florida and its people begin and continue to “heal.”

## Case Objectives and Use

The case is intended for use in a Public Policy, Introduction to Management/Business, or Organization Behavior class. Students are able to see and understand the variability in the environment and its impact on organizations. A wonderful discussion on social responsibility and organizational ethics may result. Students may provide their personal experiences dealing with natural disasters to illuminate key aspects resulting from disasters like Hurricane Ivan.

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# CONTROLSYS

Stephanie Hurt, *Meredith College*  
Marcus J. Hurt, *EDHEC Business School*

## Case Synopsis

ControlSys is unusual in that it uses an interactive exercise format to get across messages about strategic choice and implementation as they may be lived at different levels of the organization. Laid out as an in-basket case like those used by recruiters for management or consulting positions, its purpose is to get participants in management programs to realize the need to initiate strategic change from their own functional management levels—and often without top management support.

A critical and somewhat classical strategic situation was chosen to provide participants with an opportunity to come to this realization: a vanguard technology company has become chronically innovation-driven to the detriment of profitability, and this policy is supported by the CEO and the powerful R & D director. These two managers are obviously the garage-business pals who built the company which has now become a division of a larger corporation, and they fail to see the need to slow the rate of innovation to become more cost effective.

Into this situation is inserted a recently hired middle manager who is to provide the vehicle through which the session participants gradually become aware of the weight of the R&D focused culture of the firm and the company's dangerous evolution. To increase the tension, the new manager is catapulted into a VP position by the sudden resignation of his intended boss. This also gives him access to a higher level of information. He learns that, in his new position, he is scheduled to leave immediately for corporation HQ where he will spend one week meeting staff members and learning about corporate strategy. Thus, to prepare for his trip, he reads through his predecessor's in-basket.

## Case Objectives and Use

Control Sys is a case designed for use in Executive and full-time MBA programs with applicability in undergraduate management programs. By the issues it evokes, it straddles the disciplines of Business Policy, Organizational Behavior and Management. Its usual application is in Management Courses with a strong stress on Strategy, Culture and Change. It is written in the form of a series of e-mails found in the in-box of a new VP of Engineering of a European high-tech electronics firm. Participants, working in teams, are asked to read through the e-mails and summarize the situation they perceive in the firm. Discussion is led around the different teams' syntheses.

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# SMALL SCALE CHANGES AND LARGE SCALE IMPACTS

I. Edward Jernigan, III

Joyce M. Beggs

*University of North Carolina at Charlotte*

## Case Synopsis

Integrated Health was a large private, nonprofit health care system located in Tempe, Arizona. Integrated Health consisted of four community hospitals located within a 75-mile radius of Tempe, three long-term care facilities, a heart institute, a cancer treatment center, two graduated care retirement facilities, a hospital services company, and a health maintenance organization. A year ago, the decision was made to implement a computerized medication administration record (MAR) at Integrated Health. During the first year, the MAR system would be implemented at Central Hospital of Tempe. After the “bugs” were worked out, the computerized MAR would be implemented systemwide. The MIS department at Central Hospital was designated as the initiator and direction setter for the project. The MAR project was implemented and immediately failed. A management team was assembled to study the project failure and to determine how to reimplement the MAR. Over the next six months, the management team developed a strategy for identifying and overcoming the causes of the MAR project failure. Ultimately, the MAR project was successfully implemented, but along the way the management team had to learn a great deal about themselves, and their organization. Along the way they all had to develop management skills critical to effectively managing small scale changes that have large scale impacts.

## Case Objectives and Use

This case describes the response to a failed change project in a hospital setting. The primary objective of the case is the introduction to issues associated with managing complex change. Other objectives are to provide students the opportunity:

- to illustrate the impact of political behavior on change implementation,
- to demonstrate the influence of intergroup conflict on change management,
- to illustrate the importance of adequate planning prior to initiating change,
- to highlight the role of organizational readiness for change,
- to illustrate critical management skills for change, and
- to illustrate the importance of good communication.

Based on a combination of field research and secondary research, the case is appropriate for graduate or undergraduate courses in organizational behavior, organizational development, health care management, or management information systems.

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# PROMOTING A BAKERY IN GOOD TIMES

Keith C. Jones

*North Carolina A&T State University*

## Case Synopsis

Brian was very impressed with the continuing success of his family's bakery. While other companies in the city of West Salem, Wisconsin had struggled during the past year, Brian's numbers had steadily increased. His sales were up over last quarter and over last year. The one aspect of the business that limited the continued growth of Linda's West Salem Bakery was the lack of a specific, targeted promotional plan. Brian, the manager, was contemplating what should be his next business move. Brian realized there were three components of the business that could experience growth with the appropriate promotional campaign and a potential new product line he could introduce. One of the main areas of potential growth was within the commuters traveling past the facility to their work place from home and then back again. While Brian had some basic market information (some demographics and some traffic study information) Brian realized that, but did not know exactly what, additional information might have been beneficial to the particular potential market. Two other areas of existing product expansion Brian considered for the business were the gourmet pet snack foods and the business-to-business component. A new product line considered was the addition of a sandwich line to complement a recently introduced soup line. The main problem Brian was faced was the need to develop a non-traditional promotional campaign to create growth for the business.

Brian has recently contacted you to assist him in this decision making process. What plan would you recommend Brian follow to assist in growing the business?

## Case Objectives and Use

This case is based on an actual company and situation and is intended to be used in both junior and senior level marketing courses involving marketing strategy and/or marketing planning. The case provides the students with the opportunity to use technology skills to develop an action plan for the business. The classroom discussion should focus on the market opportunities for the business within a specific business environment. Promotional plan development for specific target markets and product development for specific product opportunities should be the main points covered in the discussion. The situation in the case cannot be solved through standard marketing and promotional strategies or tools. The case forces the students to think outside the box and to demonstrate their ability to think and apply in creative manners.

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# GEAR UP SUMMER CAMP AND COMMUNITY PARTNERSHIPS

Robin Guill Liles  
Miriam L. Wagner

*North Carolina A&T State University*

## Case Synopsis

Original framers of the US Department of Education's 1998 Amendments to Higher Education Act of 1965 (P. L. 105-244) included provisions to fund programs intended to help low-income students successfully negotiate secondary school, thus obtaining a high school diploma or its equivalent, and increasing the likelihood that these students would continue with their post-secondary education. (<http://www.ed.gov/policy/highered/>) These programs were described in Title IV (Student Assistance) of the Amendment. GEAR UP—Gaining Early Awareness and Readiness for Undergraduate Programs—is one Title IV program.

The following case study describes a summer residential camp for 10<sup>th</sup> grade girls and boys. In this event, one GEAR UP director, one counselor educator, and one banking executive teamed up to provide real-life training exercises for graduate counseling students, as well as financial literacy learning and educational and career exploration opportunities for GEAR UP students. An evaluation of the partnerships among the GEAR UP director and the academic and banking personnel with corresponding activities is also included.

## Case Objectives and Use

The case is intended to help directors and administrators of other early-intervention programs (e.g., GEAR UP, Trio, Upward Bound, etc.) think about new and innovative ways of forwarding their program purposes through partnerships with academic and other community personnel. Additionally, counselor educators may study this case to learn ways to infuse some real-life experiences into the academic setting, thus allowing counselors-in-training to gain insights into the counseling process prior to final stages of their academic preparation (i.e., internship). Finally, banking and other corporate leaders may gain insights relative to community involvement and service. The case is divided into three sections to facilitate class teaching and discussion.

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## SHAWNEE HILLS

Deanna R. D. Mader  
W. Blaker Bolling  
Janice Hay  
*Marshall University*

### Case Synopsis

Shawnee Hills (SH), which provided comprehensive mental health and mental retardation services to improve the quality of life for community citizens, opened its doors in 1974 and closed them permanently in a span of approximately 30 years. Mission-driven and solidly focused on the target market, SH grew in its first two decades to become one of the region's largest employers. Staff were well trained and morale was high. However, toward the end of the second decade and into the third, things changed dramatically. Management lost sight of the mission and services began to suffer. The CEO became enamored with Total Quality Management and attempted to apply it, though not very well, to SH and he spent increasing amounts of time in TQM consulting. Personnel, once clear in their purpose, were frustrated and disillusioned as they were moved frequently and without warning across departments. Block grants ended and the Medicaid system moved toward a managed care system. Toward the end, expenses were greater than revenues, staff no longer felt adequately compensated, and financial difficulties were exposed. The CEO was forced to resign and new management tried, without success, to save the business in its last five years. What led to the demise of SH and what decisions could have been made earlier on to save it?

### Case Objectives and Use

The objectives of the case are to provide an example of the critical balance between internal and external factors in maintaining the successful operation of a business, to illustrate the importance of understanding and remaining focused on the needs/wants of the target market, to demonstrate the importance of the mission statement, goals, and objectives both philosophically and behaviorally, and to discuss the utilization and motivation of human resources. The case is based on personal experiences of one of the authors, brief surveys with former employees, and library resources. It is suitable for use in a graduate course or upper-level undergraduate course such as Strategic Management, Business Policy, Marketing Management, Health Care Management, or Services Marketing.

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# **MODERN MEDICAL, INC: MARKET EXPANSION IN AN ENVIRONMENT OF LOW EMPLOYEE MORALE**

Fred H. Mader  
W. Blaker Bolling  
Lindsay Smith  
*Marshall University*

## **Case Synopsis**

Mitch Cantrell, CEO of Modern Medical, Inc. (MMI), stood at the entry of their soon-to-be-dedicated expansive new facility. He thought about the original four physicians who formed the company some thirty years ago. What would they think about this bold venture consolidating all of their existing services at a new location in a retrofitted abandoned superstore? Though bold, he knew the decision was solid. The nearly 200,000 square feet of remodeling was first class. The location was terrific; at the intersection of the interstate and the region's major artery. In addition, though seven miles distant, the location was in the direction of economic development, making the facility accessible to an ever-widening market. Yet, Mitch had an uneasy feeling in the pit of his stomach. His mind turned to the core of the business, the employees. He was aware of some significant morale decline among the staff. At first, he had brushed it aside, rationalizing it as the grumbling of a few. But the 85% turnover rate in one department this past year really got his attention. He knew MMI pay was below the going rate, but MMI had always been able to compensate for the lower pay with a better working schedule and better working conditions. After all, MMI provided only scheduled outpatient procedures. He tried a bonus system, but the staff viewed the bonuses as a pittance. He held after-hours meetings complete with entertainment and role play scenarios performed by managers and supervisors. Unfortunately, response was negative with some staff reporting humiliation from the well-intended role plays. Mitch knew he needed to take action. He could not allow low morale to eat away at the company like an aggressive cancer. But what?

## **Case Objectives and Use**

The principle objective of this case is to have students consider the impact of low employee morale on the ability of the firm to take full advantage of a market expansion opportunity. Secondary objectives include identification of factors determining employee morale, development of programs to boost employee morale, and the benefit-cost trade-offs involved. As the discussion develops it can focus on the marketing impacts of service pricing and provider compensation. The case is most appropriate for undergraduate courses in Strategic Management, Human Resource Management, Health Care Management, and Marketing Management.

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# WHOSE HAND WAS IN THE COOKIE JAR?

Robert McDonald

*University of New Haven*

## Case Synopsis

John Davies, assistant controller, was concerned about an upcoming meeting with his boss, the controller, about year end accounting adjustments. He had noticed over the past two years that the controller was adding to five reserve accounts, and he could not justify the need for the additions. The five accounts in question were: bad debt, product returns, inventory obsolescence, warranties, and deferred revenue. “Cookie jar” accounting came to mind as John thought through his arguments against the practice. “Cookie jar” accounting sets aside reserves in good times to be dipped into in bad times when the firm needs a boost to earnings. A second version sees excess reserves set up in a bad year by over expensing some items. Some managers believe that Wall Street analysts will look beyond the big hit to earnings and look to higher future earnings. This excess reserve can be dipped into for a hike to earnings. Both schemes are obvious attempts of earnings management.

As John thought about the SEC and FASB actions to curb the worst abuses of “cookie jar” accounting, he knew the controller would cite conservatism in accounting, industry practice, and materiality in his defense of the added reserves. John was concerned that an ulterior motive for the controller was to present earnings growth to the venture capital firms which had funded the start up firm. Management in the firm were hoping for a successful initial public offering (IPO) after the venture capital funding, and a record of strong earnings growth would be necessary for the IPO.

## Case Objectives and Use

While the accounting regulators have tried to reign in the recording of excess reserves, there still is a gray area that allows differing interpretations of what should be recorded. In this case the student will balance off SEC and FASB rulings on reserve accounting, conservatism in accounting, industry practice, and materiality to arrive at a solution of the proper accounting for the five accounts.

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# KRISPY KREME DOUGHNUTS, INC.

Rachael Melton  
Mary Kay Sullivan  
*Maryville College*

## Case Synopsis

Founded in 1933, Krispy Kreme Doughnuts, Inc, had become established as a strong competitor in the specialty eatery industry, alongside companies such as Starbucks and Dunkin Donuts. Krispy Kreme eschewed formal advertising, relying instead on word-of-mouth “buzz” to create excitement about its brand. Through the years the company had streamlined production and distribution to achieve significant efficiencies and strong profitability. It had loyal employees, thanks to enlightened human resource practices, and a widely recognized logo and store design. In the 1990s, the opening of a new outlet brought crowds of customers and significant press publicity. The company’s initial public offering in 2000 was very successful and, with steadily increasing earnings, stock price continued strong until 2004.

But in 2004, a growing scandal surrounded the company. The SEC launched an investigation into irregular accounting procedures that masked declining profits at Krispy Kreme. The company eventually restated earnings downward by \$25.6 million and CEO Scott Livengood resigned.

In 2005, Krispy Kreme was a company trying to salvage its reputation and regain profitability. For many, the causes of Krispy Kreme’s financial woes were unclear. The company clearly needed to determine the reasons underlying its poor performance. Then it needed to decide how it could rebuild trust and return to its successful position in the industry.

## Case Objectives and Use

This case is appropriate for an undergraduate Strategic Management course. The overall objectives are to examine a firm facing financial and strategic difficulty, determine how this came about, and recommend what might be done to bring the company back to a strong competitive position. Among other concepts, the following could be used in analysis: SWOT analysis, Porter’s Five Forces model, Stakeholder view of the firm, and use of the resource-based view of the firm to identify core competences. Ethical issues in the case can be explored.

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## E. W. SCRIPPS COMPANY, 2005

Ashley Moeller  
Mary Kay Sullivan  
*Maryville College*

### Case Synopsis

In 1878, Edward Wyllis Scripps founded a local newspaper that, over the next century, became a multi-million dollar media conglomerate. By 2005, Scripps had holdings in 20 newspapers, 5 networks, 10 broadcast stations, a home-shopping channel, and a licensing company. It competed against similar media conglomerates such as the New York Times Company and Media General. Even though the general environment had changed significantly and newspaper readership was declining, Scripps remained profitable. But the company faced challenges in its industries due to continual technological advances and changing customer preferences.

In 2005, Ken Lowe, CEO of Scripps, was faced with the question as to whether or not to expand the company into the comparison shopping business with the acquisition of Shopzilla, a comparison shopping website. Scripps had entered the retail business in 2002 with the purchase of Shop at Home, but had yet to realize profits from this division.

Lowe and the Board of Directors had a difficult decision to make concerning the future of the company.

The case overviews the history of the company as well as internal and external factors affecting the company's performance. The student is asked to determine how/why Scripps has been profitable in a changing environment and how it can position itself for the future.

### Case Objectives and Use

This case is appropriate for an undergraduate Strategic Management course and would be particularly useful in introducing Kaplan and Norton's Balanced Scorecard. Teaching objectives include the following: (1) to recognize the importance of a clear concept of corporate mission and what business the company is in, (2) to consider how a successful competitive strategy flows from the mission, and (3) to assess the impact of changes in the competitive environment and the general environment on competitive strategy.

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# LIBBY BROWN

Lindsey Morrow

*University of South Carolina*

## Case Synopsis

Professor Libby Brown is concerned about her student, Jared Moody. The case is presented in three parts with additional information provided in the instructor's manual. Case A describes Libby's encounter with Jared in the classroom after he was physically assaulted by his roommate. Libby, concerned by Jared's agitated appearance and his passing mention of suicide, is unsure of her responsibilities. Case B follows Libby as she attempts to resolve her concerns by speaking to her department chair. This particular case prompts Libby to decide whether or not she can choose to ignore her concerns. Case C, introduces one last issue for Libby regarding Jared. On the final day of class, Libby is confronted by Jared and a rather unusual classroom visitor – his dog. Case C prompts readers to think about how they might handle a similar classroom disturbance. Discussion leaders may choose to use the letters included in the epilogue of this instructor manual to reveal how Libby Brown chose to resolve the situation.

## Case Objectives and Use

These cases could be used in graduate teaching assistant, adjunct and faculty training situations. They are also appropriate for graduate courses focusing on preparing students to teach. The issues discussed in these cases are also appropriate for use in generating communication and dialog between both faculty and student affairs professionals and graduate students in a joint training seminars designed to discuss student-centered issues from each of these perspectives.

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## CHAPTER THREE

Rebecca J. Oatsvall  
Elizabeth K. Yaros  
*Meredith College*

### Case Synopsis

PS is a fifty-five year old woman who took early retirement from a successful career in the telecom industry, first in computer systems and then in the human resource area. After retirement, she worked for several years as a consultant for firms implementing PeopleSoft in their human resources departments. At about the same time the economy weakened, her consulting work dried, and she divorced. She has recently moved from Boston to North Carolina and has reprioritized her goals. She wants to begin a third career and has to decide what alternative best suits her new priorities, her talents, and provides her with the income that she needs. She has identified three possible opportunities: return to school to prepare for a job in teaching, return to consulting, or begin a home-based business selling cosmetics. Students are asked to evaluate the three alternatives based upon her stated priorities and advise her which opportunity to pursue. Students must address the issue of achieving balance between conflicting goals of income production and time for leisure activities, i.e., quality versus quantity of life. Students are also asked to consider continued employment after retirement.

### Case Objectives and Use

This case is suitable for an undergraduate class in personal finance or consumer economics. The first issue to be explored is quality of life versus quantity of life. Students should address the need to set financial and non-financial goals and then prioritize them. Students must assess income and expenses for three separate alternatives and then suggest which alternative best suits her stated priorities. Students are encouraged to consider her personal life situation, personal values, and economic factors that influence her decisions. The opportunity cost associated with attending graduate school must also be taken into account.

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# POLYSTY-MOLDING MACHINE ACQUISITION

Timothy A. O. Redmer  
A. Greg Stone  
*Regent University*

## Case Synopsis

The Polysty – molding machine case highlights a typical capital budgeting decision situation. David Gates, president of Polysty sees great potential in the company and is facing a “chicken or the egg” dilemma. He believes there is unlimited potential for his top of the line Polyblock product. Should he expand fixed asset capacity prior to anticipated increases in demand, or wait until sales increase and then expand capacity but possibly loose sales? Complicating the situation, is that Polysty is a turnaround company which narrowly avoided bankruptcy less than two years ago and its cash flow situation is still very critical. Polysty maintains the highest level of integrity in its decision process, adhering to the Christian practices of its president. David wants to do what is in the best interest of all potential stakeholders. The company based its decision on primarily subjective criteria; however, there are many objective capital budgeting criteria that could also be considered before making a final decision. Additionally, non-financial considerations may also be important in the analysis.

## Case Objectives and Use

The objectives of the case include:

- Analyze critical issues in the capital budgeting process
- Understand capital budgeting methods
- Complete a capital budgeting analysis
- Review the financial condition of the company
- Consider other factors including ethical implications of a decision of this nature

The integrity, moral, ethical, and Christian perspective should not be disregarded in this analysis. David and other executives have adhered to a basic corporate philosophy and it is at the core of any decision process. When facing any critical capital budgeting decisions, the leaders must remain aware of their values. At the same time, while value issues are important, he needs to make a decision that will best meet the needs of all his stakeholders. David still needs to remain competitive, be aware of his cash flow, meet employee needs and make the company profitable in the very near future.

The Polysty case can be used in a finance or managerial accounting class at the undergraduate or graduate level that covers the topic of capital budgeting. The information presented is relatively straightforward and there is a clear decision point. There are a sufficient number of extenuating circumstances to make for a good discussion of critical factors in any capital budgeting analysis.

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# SANDHILLS INVESTMENT COMPANY

Michael Ritchie

Kathleen Wates

*University of South Carolina Aiken*

## Case Synopsis

Sandhills Investment Company is a commercial real estate firm that has been in continuous operation since 1958. The company is located in a medium sized metropolitan area in the Southeast. The company originated as Sandhills Oil Company and was the distributor for Shell Oil, and later, Union 76 for many years. Sandhills Oil was quite profitable during the 1960s and 1970s and began to diversify into commercial real estate holdings, for the purpose of lease and sale.

After the oil crisis of the mid 1970s and the subsequent change in the way Americans purchase gasoline, Sandhills Oil realized that oil margins were falling sharply and began to concentrate primarily on the real estate investment side of the business. During the late 1980s, only 10% of the company's sales were from the petroleum business and it was decided to change the name to Sandhills Investment Company to better serve the new direction of the company. During the real estate boom of the 1990s, the company began to develop commercial property and eventually involved itself with speculative development projects. However, the economic problems of 2000, and the subsequent downturn in real estate development market, caused severe hardships for Sandhills. Several of their major assets were sitting idle, with no income stream or sales potential. Sandhills, while remaining financially healthy due to their lucrative past, is now facing difficult decisions concerning their future expansion into their areas commercial real estate market.

## Case Objectives and Use

The objective of this case is to have students analyze this company and offer decisions regarding the strategic management of the firm, as well as the strategic application of its financial resources. The case is suitable for use in strategy, managerial finance, investment, and accounting classes.

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# THE MORTON HOTEL

William L. Shelburn

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## Case Synopsis

The owners of the Morton Hotel are faced with a challenge. Their hotel is not producing the sales or profits they had envisioned when they bought the hotel several years ago. They were quite successful in operating upscale hotels in New York and Vermont and thought they could apply the same principles to a small hotel in South Carolina. Their efforts to bring fine lodging to a small South Carolina town had not been successful. Despite extensive restoration of the facility, which first opened in 1898, and major improvements to its restaurant and guest services the Morton had not achieved a profit. Ownership was extremely frustrated and it looked to its new hotel manager for answers.

## Case Objectives and Use

The objective of this case is to have students analyze the hotel from a variety of entrepreneurial aspects that impact profit. In particular, all aspects of marketing, operations, and finance should be considered. This case can be used in entrepreneurship, small business, marketing, operations, and finance classes.

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# CELBLOX—MARKETING STRATEGY

A. Gregory Stone  
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## Case Synopsis

Only 12 months into the ownership of Celblox, David Pace saw that, if he could turn the company around, it could dominate the market for insulated concrete forms (ICFs). When David purchased Celblox, it was near bankruptcy.

To increase sales, he would rapidly need to cultivate customer demand in his two target customer populations—construction contractors and people wanting to build a house. The construction industry, however, is very fragmented; there are few associations through which David could effectively reach most of them.

With a creative and effective marketing campaign, sales were sure to ignite. With increased sales, Celblox could identify the key success factors that could be used to improve their marketing initiatives. However, if marketing ignored sales and sales ignored marketing, they could end up competing for the company's limited employee time and corporate resources. Balancing human resources between marketing and sales would be harder than David thought and further complicated by a number of unanticipated variables.

The CELBLOX Marketing Strategy case study reflects the internal operations and processes of Celblox, LLC, a real company in Reedsburg, Wisconsin. Its entrepreneurial owner, David Pace, has a tremendous long-term vision for the company, and its high-quality construction industry product. Students engaging this case can cultivate specific marketing strategies based on tactical decisions, marketing theory, and their practical application.

Ethics and Christian values are an undercurrent in this case. David and other Celblox executives have adhered basic core values. Critical corporate decision points press leaders to integrate values with the needs of all the stakeholders. David's marketing decisions will impact the company's competitiveness, cash flow, employees and profitability in the very near future.

## Case Objectives and Use

The objectives of the case include:

- Differentiating between the marketing issues and the sales issues.
- Developing an organizational structure which reflects a strategic vision and mission for CELBLOX.
- Restructuring the sales and marketing division distinguishing the functions of marketing and sales
- Implementing a new product identity and marketing programs through branding, product benefits, Web site, collateral materials, and customer service.
- Exploring regional production, marketing, sales, and distribution centers to initiate and service the sale of CELBLOX products.

The CELBLOX case can be used in an Introduction to Marketing class and/or a Strategic Marketing class at the undergraduate or graduate level. It would also work well with a Marketing Management course that uses cases. It has the additional potential to be used in an entrepreneurship class.

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# JABO SUPPLY COMPANY: MARKETING AUDIT—A VALUABLE TOOL

Uday Tate   W. Blaker Bolling   Ryan Morrison  
Kim Congrove   Ashley Collins  
*Marshall University*

## Case Synopsis

Jabo Company, Inc. (Jabo) is a distributor of pipe, valves and fittings, headquartered in Huntington, West Virginia. JABO considers itself as one of the "top 50 suppliers" in the United States for pipe, valves and fittings. As listed on the company's web site ([www.jabosupply.com](http://www.jabosupply.com)), Jabo represents a large group of manufacturers, including those of industrial pipes, valves, automation and controls, fabrication, and polyethylene. The company is facing a situation where the materials costs are rapidly increasing, the nation is experiencing a recession, and the dependence on coal has been reducing steadily during the past decade. The company feels that these external factors have caused a dramatic decrease in sales and profits of the company in the past several years (except for a slight improvement in 2004).

The company management has called for a thorough audit covering such areas as environmental management, corporate mission, the company's overall strategy, the organizational structure, decision support system, productivity, and marketing. The company's report from the audit reveals a plethora of symptoms and problems areas. Also, the company management has listed a set of recommendation to overcome those problems.

The fundamental question is: has the company done a thorough job in auditing its functional areas? Do the company's recommendations address the problems or symptoms of those problems?

## Case Objectives and Use

The case is based on a real company, located in West Virginia. It should be noted that the names of persons in the case are fictitious to maintain confidentiality. The case can be used at both the undergraduate and graduate levels in courses focusing on strategic marketing and strategic management. The case should generate a lively discussion on three interrelated areas: (1) environmental management, (2) the role of organizational audit, and (3) the concept of marketing orientation. Specifically, the case attempts integrate these three areas to show their impact on profitability.

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# RECOVERY PRIOR TO SUCCESSION: A CASE STUDY OF A FAMILY BUSINESS FACING UNEXPECTED TURMOIL

Assad A. Tavakoli  
Craig G. Wishart

*Fayetteville State University*

## Case Synopsis

Soak & Swim, Inc. is a small family owned pool and spa retail company that is being passed to the next generation, during a period of turmoil when the company struggles with a recent slump in sales. Jonathan Parker owned the company since the early 1970's and successfully grew it to a multi-million dollar business, but just as he is about to pass it on to his son, Joe Parker, he realizes that his life's work is at risk. Soak & Swim is faced with numerous concerns, including increased competition, economic conditions, and prevailing management practices. The father and son team need to identify the sources of problems and devise a strategic plan to resolve these issues. Financial statements for three years, price and quality perception comparisons among major competitors, and pertinent industry benchmarks are presented. What are Jonathan and Joe Parker to do to insure the long-term survival of Soak & Swim?

## Case Description and Use

This case focuses on diagnosing the symptoms of a business that is experiencing unforeseen turmoil in multiple functional areas, and devising strategies to guide it towards recovery. With a difficulty level of four (on a five point scale), the case is appropriate for an undergraduate senior level or graduate level entrepreneurship, finance, small business management, and business policy courses. It is designed to be taught in three class hours and is expected to take four hours of preparation outside of class. The case requires students to conduct a SWOT; and internal and external factor analysis; compute critical financial ratios from the balance sheet and income statements; analyze the market environment using RMA (Robert Morris & Associates) analysis and the Porter's five forces model of competition; project sales and cost estimates, and develop break-even charts. To enable students to perform the required tasks, the following data is provided: financial statements for three years; price and quality perception comparisons among major competitors; and pertinent data for industry and RMA analysis.

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# A FAMILY BUSINESS SUCCESSOR CONSIDERS QUANTITATIVE METHODS

Fred A. Ware, Jr.  
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## Case Synopsis

The main character has worked for many years in a successful family retail shoe business. His father and the senior managers have long demonstrated an extraordinary work ethic with a conservative but effective purchasing policy of deliberately overbuying shoes semi-annually, virtually preventing any stockouts. The business has developed an enviable reputation of good customer service with consistently large and diverse inventories.

Through dogged persistence, starting with a purchased (ineffective) data management system, the younger family member has gradually built his own valuable data base. Senior managers and even the young man himself are reluctant to change the normal procedures even though better use of quantitative data would likely significantly improve the profit picture. It is noted that it would be reasonably safe in today's marketplace to make smaller initial buys and rely on subsequent reordering of top selling items before stockout occurs. Computerized information systems would signal ordering times. One can empathize with the managers' risk involved in making a buying policy change since the firm has performed well in the past. Should they take the chance?

## Case Objectives and Use

This case provides an opportunity to consider that vital period in a family business timeline when a younger successor is moving inevitably toward taking over top management of the organization. In this situation, the son of the founder/owner of a retail shoe business is contemplating the use of quantitative methods as a change in the normal seasonable merchandise buying policy of relying on intuition and experience. The heir-apparent is nervous about the proposed change and wonders if his father and other senior managers will be willing to take the risk.

The case, based on an actual business and using primary data, was written for undergraduate courses in Family Business Management, Small Business Management/Entrepreneurship, and Management Science. Some sample data is provided for optional assignment by the instructor. With or without the quantitative aspects, the case may be used in small business management/entrepreneurship courses to segue into behavioral aspects of family business succession.

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# PAPERS AND PLENARY SESSIONS

## CASE STUDIES IN APPLIED ETHICS COURSES: SOME CAVEATS

Matthew W. Hallgarth, United States Air Force Academy  
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### Abstract

In the academic discipline of philosophy, at least in the United States, applied ethics is a growth industry. Philosophy departments wanting to expand the reach of their student base and hence the size of their staffs and budgets have seized on opportunities to teach courses on such topics as business ethics, medical ethics, journalistic ethics, engineering ethics, military ethics, and legal ethics. While some philosophers think these courses and their professors do not qualify as genuine philosophy and genuine philosophers respectively, the trend remains toward an increase of numbers and influence of these courses in the practical academic disciplines. There is a pressing need for more of these courses in universities nationwide. Departments capitalizing on this trend have found fruitful soil for gaining funding for additional tenure track positions and for teaching future professionals about the crucial moral dimension of their chosen crafts.

An important pedagogical technique for stimulating dialog about moral decisions in the professions these courses relate to is the use of relevant case studies that highlight the types of moral decisions that professionals in the various disciplines are likely to encounter. The widespread use of case studies in these burgeoning applied ethics courses raises two important issues. The first issue concerns debate about what the appropriate normative grounding for case discussions should be. For example, in medical ethics Gert has criticized Beauchamp and Childress as providing a superficial list of ethical principles for medical practitioners simply to choose from as the particular case or their own normative preferences warrant. Thus, a doctor facing a difficult moral decision may choose from a list of principles that include rights, consequences, virtues, and duties to support their decision. These debates are important and should continue. The second issue, and the one to focus on briefly are practical caveats about the use of case studies per se in the classroom. There are fundamental limitations to the use of case studies for teaching applied ethics that professors should be cognizant of when they use this fruitful pedagogical technique. This brief paper addresses a few of these limitations.

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## **VIDEO-BASED CASES: ADDITIONAL ASPECTS OF ANALYSIS**

Michael J. “Mick” Fekula  
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Plenary Session Invited Speaker

### **Abstract**

This presentation addresses the development of cases from existing movies. While Hollywood producers traditionally base some of their productions upon historical cases, the opposite can also be true. Case writers can produce cases from movies, whether those movies are historical or largely fictional accounts. Although the use of video clips in the classroom is nothing new, writing a case solely based upon a movie is a more recent phenomenon that might not be fully explored by academic case-writing professionals. Only recently have outlets such as the *Hartwick Humanities in Management Institute* produced cases to accompany popular Hollywood-style movies. Thus, teachers now have the option to purchase such cases for classroom use. The advantage is that a movie or clips can be shown to accompany the case, thereby making the illustration more vivid and interesting for the students. However, this session proposes that case writers take-up the mantle and consider movies as a source for case material. Although some published cases are excellent, not all are tailored toward specific classroom needs, so even existing video cases do not tap the full-range of possibilities for a given movie. Samples of professionally marketed cases and accompanying videos are displayed in this session, as well as video clips and examples of related cases crafted for classroom use.

## **ASSESSMENT: A NEW APPLICATION FOR CASE STUDIES**

Martin J. Hornyak  
*University of West Florida*  
Plenary Session Invited Speaker

### **Abstract**

The State of Florida legislature directed universities and colleges to develop key Student Learning Objectives (SLO) to meet new Academic Learning Compacts. State-designated learning domains insist that students demonstrate the writing and project management SLOs for various courses. Both faculty and students are writers and project managers performing the academic activities necessary to attain goals such as tenure or promotion for faculty and degrees for students. To accomplish these goals, both groups complete a series of tasks requiring writing and program management skills. A mandatory course in business policy requires students to engage in and write-up case analyses, as well as participate in a business simulation. For instructors, service efforts such as developing rubrics to evaluate learning domains like writing and project management are accomplished. This discussion details an approach under development to help measure and assess state-directed learning compacts through the use of cases for student writing and project management SLOs.

# EMBRYO CASES

## **ETHICS CODES IN ACADEMIC ORGANIZATIONS: THE CASE OF THE ACADEMY OF MANAGEMENT CODE OF ETHICS**

Chi Anyansi-Archibong  
Betty L. Brewer (Retired)

**North Carolina A&T State University**

### **Abstract**

This embryo case will focus attention primarily on the two major components of the Academy of Management's Code of Ethics: Professional Principles and Ethical Standards. It will examine the structure and content of the Code. Also it will consider the Academy's approaches to communicating the Code of ethics to members and the enforcement mechanisms. Ultimately, the case will examine academic and professional organizations codes for comparability.

The case will be appropriate for teaching ethics in research courses as well as seminars on research and publications. The case will also serve to create and heighten awareness among faculty members, regardless of discipline, that ethical behavior do not only exist in the corporate world. Instances of ethical lapses are in the business community are given considerable attention in the press and recently, the academic community has experienced negative publicity about lapses in medical research and journal publications.

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# **THE IMPORTANCE OF CAPITALIZING ON THE UNIVERSITY EXPERIENCE TO ENHANCE STUDENTS' WORKFORCE MARKETABILITY**

Caroline S. Booth

*North Carolina A & T State University*

## **Abstract**

The modern workforce environment is becoming more and more competitive and less forgiving as record numbers of college graduates flood the workplace. Currently, many college graduates and advanced degree graduates find themselves in a position of having to take entry level positions far below their educational qualifications. This becomes not only emotionally distressing, but financially distressing as well.

To combat this problem, many campuses offer programs and experiences through career services, leadership and volunteer services, mentor programs, and study abroad to help students gain that added dimension to not only increase their marketability but hone their career and life interests as well. Unfortunately, many students are unaware that these services exist for them. The purpose of this case is to examine the process of how colleges and universities use their resources to promote the career development of their students.

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# NATIONAL BOARD CERTIFICATION: DOES IT IMPROVE TEACHING?

Sharon Wiley, *Randolph County Schools*  
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## Abstract

The National Board for Professional Teaching Standards (NBPTS) is a non-profit and independent organization, the purpose of which is to (a) document rigor surrounding teaching excellence, (b) sustain systematic procedures for voluntary certification among teaching professionals, and (c) advocate educational reform framed and supported by National Board Certified Teachers. NBPTS was established in 1987 in partial response to the educational report, *A Nation at Risk: The Imperative for Educational Reform*, suggesting that the American education system was inadequate to the task of preparing its children for the 21<sup>st</sup> century. Since its creation, teachers throughout the United States have undergone the certification process, and NBPTS continues to receive large numbers of applications every year from teachers seeking certification.

Fulfillment of the certification process requires approximately a year and half. Teachers applying for certification must complete a comprehensive teaching portfolio, as well as sit for a computer-adaptive examination. These tasks are accomplished in one year, and then the grading process begins, requiring an additional six months of wait time. Teachers frequently report that overall the certification process is both time-consuming and distressing. Many applicants feel they lack a clear understanding of NBPTS expectations, and this uncertainty is exacerbated by the knowledge that NBPTS does not provide feedback regarding portfolio or testing submissions. Nonetheless, teachers continue to apply in record numbers for certification; and whereas many states financially reward newly-certified teachers, a simple pay raise may not fully explain the apparent desire for certification among public education teachers.

The purpose of this case is to examine the process of National Board Certification, and the case may be used in both teacher education and educational leadership venues. The case will analyze one teacher's experience in seeking certification.

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