



Proceedings
of the
Southeast Case Research Association
Seventeenth Annual Meeting
February 12-14, 2009



Editor: Rebecca J. Oatsvall, Meredith College
Associate Editor: Christopher M. Cassidy, Marshall University



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 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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Business & Society, International	Bill Shelburn	University of South Carolina Aiken
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Education – Administration	David Condon	University of South Carolina
Education – Student Affairs	Stephanie Foote	University of South Carolina Aiken
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Entrepreneurship, Small Business	Tim Redmer	Regent University
Ethics, Law	Raphael Boyd	Clark Atlanta University
Ethics & Social Issues	Robin Guill Liles	North Carolina A&T State University
Health Care & Social Science	Miriam Wagner	North Carolina A&T State University
Management	Steve Cox	Queens University of Charlotte
Marketing	Keith Jones	North Carolina A&T University
Organizational Behavior, HRM	Joyce Beggs	University of North Carolina at Charlotte
Papers, Symposia, Interdisciplinary	Marty Hornyak	University of West Florida
Spirituality in the Workplace	John Duncan	Charleston Southern University
Strategy, OT	Chris Cassidy	Marshall University
Technology, MIS, IT	Kitty Wates	University of South Carolina Aiken

From the Proceedings Editors

Dear SECRA Colleagues:

We are happy to report that the Seventeenth Annual SECRA Meeting Proceedings showed sustained interest in SECRA, as well as contributions by newcomers. Similar to other years, many submissions fell into just 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.

Next, note that 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. *Please note that there are currently no guidelines for full case submission to the CD, so the cases are unedited and formats will vary.*

Regarding the Proceedings and CD, Tim Redmer has authored the following valuable advice:

For an author to get credit for presenting a case study at a professional meeting many universities require the publication of the complete case study in a proceedings. Therefore SECRA will have a proceedings CD including complete case studies. At the same time, some journals will not accept for publication a case study which has been previously published in a proceedings unless there has been substantial revision to the case itself. However, SECRA will accept a case for its SECRA Journal even after it has been published in the SECRA Conference Proceedings.

Some authors may not want their case published in the SECRA Proceedings in hopes of getting the case published in another journal. SECRA wants to give each author the option regarding having their case published in the proceedings. Please notify the proceedings editor at least one month before the Annual SECRA Meeting if you do not wish for your full case to appear in the proceedings on the CD; otherwise, your case will be included in the proceedings.

Thank You to the Track Chairs

Although not all of our numerous tracks received submissions this year, SECRA extends its gratitude to all those who volunteered to serve as Track Chairs. Your continued support is needed to offer as many tracks as possible, given the wide array of cases that SECRA willingly accepts. In addition, Track Chairs are asked to serve as Presiding Chairs at the Roundtables during the meeting, regardless of their assigned track.

Sincerely,

Becky Oatsvall & Chris Cassidy, SECRA Proceedings Editor and Associate—2009

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

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<i>Marilyn L. Taylor</i>	<i>University of Kansas</i>
<i>Isaiah O. Ugboro</i>	<i>North Carolina A&T State University</i>

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CASES

REBECCA JOHNSON

Joyece E. Dykes Anderson
University of South Carolina

Case Synopsis

The main character is an African American female professor with many years of experience in community organizing and activism. She describes herself as having a “strong commitment to people.” In her doctoral program, she discovered the importance of worldviews and paradigms; how they influence the way people interact in their environments and with others. This epiphany launched her into the creation of her reality that extended beyond the classroom, “it is important for me to be a whole person and communicate real life experiences to my students.”

An exercise was presented to her students as a class assignment. Each student was to list a population or behavior that was found objectionable. Furthermore, the students were expected to analyze what that meant to them and share their views with the class. The first time Rebecca Johnson taught this class; few students spoke out. Rebecca realized that it was difficult for students to speak about their prejudices and biases. That was okay; she intended this exercise as a means to deconstruct personal views. However, the second time she taught this course, a number of students spoke out. Rebecca considered this to be great progress. It was the end of the day, time for one last presentation. A student volunteered to share her views. Rebecca Johnson was speechless as her class gathered their things and headed for the door. Class was over, but Melissa’s last statement echoed through the room, “I’m a lesbian, please don’t throw up on me!”

Case Objectives and Use

Often professors, especially new professors can find themselves in unexpected situations; things that leave them searching for answers under time constraints and the watchful eyes of their students.

This case, based on an actual classroom experience was written for graduate courses in Education, and the Social Sciences. The intent is to provide students the opportunity to consider the unexpected things that may occur in a classroom with the chance to think through solutions in advance. Using Rebecca’s dilemma, students will use the facts presented in the case to construct solutions: What should Rebecca do?

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THE EVOLUTION OF APPLE, INC.

Megan Ayers
Mary Kay Sullivan
Maryville College

Case Synopsis

Apple Computer began with Stephen Wozniak, age 20, and Steven Jobs, age 16, joining forces to build a personal computer that they named Apple. In line with the whimsical approach of the two, the company was established on April Fools' Day. This irreverent attitude continued in the corporate culture of the new company, a company that prided itself on creativity and innovation.

As Apple Computer grew, senior management changed a number of times. After Steve Jobs' departure to start a new company, Apple became more marketing oriented and less focused on innovation. For a decade, Apple saw market share decline and by the 1990s was on its way to becoming a niche player in the computer industry. Steve Jobs returned to head up the company in 1997, bringing a renewed focus on R&D and innovation; the result was a spate of innovative products such as the iPod and the iPhone. Share price increased dramatically over the next ten years, rising to a high of \$190 per share in 2007.

But by 2008, a world-wide recession was taking its toll on the company. As Apple completed 25 years as a publicly traded company, management noted the severe decline in stock price over the past year and wondered what course Apple should take.

Case Objectives and Use

This case could be used effectively either in a course in Strategic Management or Organizational Behavior. For the former, used in conjunction with Michael Porter's competitive strategies, Apple is an excellent example of differentiation through quality and innovative products. Similarly, when Apple lost its focus on innovation, the company lost its competitive advantage and began to decline. An industry analysis would also be appropriate with this case, examining the competitive approach of Apple's rivals. Also, the company's strong corporate culture is an example of a strength that is difficult to replicate.

An examination of Apple's corporate culture would fit well with an Organizational Behavior section on organizational culture. The culture of creativity and autonomy for the employee would work well with an exploration of Hackman and Oldham's job characteristics model. Also, issues of leadership can be explored with this case.

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EQUITY AND FAIRNESS IN GRADING ENGLISH AS A SECOND LANGUAGE STUDENTS

Jane E. Barnes
Meredith College

Case Synopsis

JB was a former middle manager with 20 years of experience at a large corporation teaching her first class at a racially diverse urban community college. Approximately 85% of the class are English as a second language students. The college tests students for reading, writing, and listening in English and provides instruction in the deficient areas before they are able to take courses. Despite this, JB is faced with grading exams that are horribly written and not up to college standards. Yet, it appeared that the students grasped the basic concepts, despite their inability to express them in coherent written fashion. Her dilemma is several fold: Should she have a separate grading standard for ESL students? If so, was she setting up for failure those who might want to move to a four-year university? How fair would a different standard be for the native English speakers? Could she grade for content instead of expression? How might she change the classroom instruction and/or the grading policy to accommodate this classroom dynamic?

Case Objectives and Use

This case, based on the author's real experience, is designed for undergraduate students in Education or Organizational Behavior. It allows students to determine effective teaching techniques to reach different types of students. It also provides them with the opportunity to debate the fairness of establishing different standards for students who may be disadvantaged. From an organizational behavior perspective, the principles of equity and fairness can be applied. Finally, the case provides business students with a critical thinking exercise through the discussion of translating effective business skills into the classroom.

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HISTORY REPEATS ITSELF: EX-MERRILL CEO OUSTED

Joyce M. Beggs
Edward Jernigan
University of North Carolina at Charlotte

Case Synopsis

Bank of America has a history of ousting executives from acquisitions. During a 48 hour marathon in September, 2008, 94 year old Merrill Lynch & Co. agreed to sell itself to Bank of America for \$50 billion. The deal was recently approved.

On January 22, 2009, Ken Lewis, CEO of Bank of America, flew to New York to accept the resignation of John Thain, Merrill Lynch CEO. At one point, Thain was predicted to be the successor of Lewis. Several speculated that Thain's missteps included not personally informing Lewis of the \$15 billion fourth-quarter losses, awarding rushed bonuses to Merrill employees of between \$3 to \$4 billion, and spending \$1.2 million refurbishing his downtown Manhattan office. Mr. Thain also requested a \$10 million bonus for himself but had withdrawn the request. After problems emerged, Mr. Thain went to Vail, Colorado, for a vacation.

All this occurred while Bank of America announced its first quarterly loss in 17 years and a round of government aid of \$20 billion including \$10 billion for Merrill. The bank is slashing 35,000 jobs over three years to accommodate the Merrill purchase and the economic recession.

Case Objectives and Use

The case provides an opportunity for students to examine the ramifications of a major acquisition in the financial community and to explore the role of CEO. In addition, the role that culture plays when combining organizations is another topic covered. Bank of America has been called the Wal-Mart of banking; whereas, Merrill Lynch is known for lavish spending.

The case is based on actual events widely written about in secondary data sources. The business sections of the newspapers and the Wall Street Journal are the major sources of information. The case can be used in undergraduate and graduate courses in strategic management, business policy, leadership, and corporate governance.

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TENNESSEE VALLEY AUTHORITY, 2008

Matt Bertrand
Mary Kay Sullivan
Maryville College

Case Synopsis

The Tennessee Valley Authority (TVA) was created during the Great Depression to bring utility service and economic development to the impoverished residents of the Tennessee valley. The quasi-governmental agency had created considerable controversy through the years as it dislocated thousands of people in order to build dams and develop lakes for hydroelectric power. In later years, controversy swirled around TVA land that was taken by eminent domain and later sold to private parties in order to reduce TVA debt.

The focus of the agency's mission had evolved somewhat through the decades and, by 2008, the service area far from longer poverty-stricken. TVA had turned to other issues in its mission, such as providing recreational opportunities.

In addition to economic changes, the year 2008 brought political changes that could impact the future of TVA. Critics complained that TVA had outlived its usefulness and, unlike previous U. S. presidents, a new president-elect had never expressed interest in the agency. TVA carried a heavy debt burden and was at risk of being considered no longer relevant. Some believed that the agency had been focused primarily on the past, rather than the future. What strategies would help position TVA for the future?

Case Objectives and Use

TVA could be used in a Strategic Management course as an example of mission creep. The original mission – to bring inexpensive power to an impoverished area—had been fulfilled. The agency then turned to other, less dramatic, aspects of its purpose, such as recreation. An examination of stakeholder needs based on stakeholder theory would also be instructive; this might suggest that perhaps the organization itself is the entity receiving primary benefits today. Another strategic issue would involve determining what generic (competitive) strategy would help sharpen TVA's focus. Could TVA differentiate itself from other utilities, for example, through an environmental focus?

For those with an interest in Economics, Tobin's Q could be used to examine the replacement costs of very capital-intensive assets and the costs of using these assets. Finally, ethical issues presented here could be examined. Assessing the ethics of seizing land through eminent domain or selling such land decades later – for a “greater good” – using rights theory, justice, and utilitarian theory should provoke a stimulating and educational discussion.

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CAN I RIDE?

“THE CASE OF THE PGA TOUR v. CASEY MARTIN”

Raphael Boyd
Clark Atlantic University

Case Synopsis

Casey Martin, a disabled golfer due to a “degenerative leg ailment,” sought to use a golf cart to ride in a PGA Tour sponsored qualifying tournament event. His condition made it virtually impracticable for him to navigate an 18-hole golf course. Martin was denied his request to use a cart by the PGA Tour and filed a suit under the Americans with Disabilities Act of 1990 (ADA).

This was a highly publicized legal case that involved the legal concept disability laws. This case has a component, which will require students to make decisions and recommendations concerning public policy as it affects this issue. For some, it represents the need for the further application of laws allowing the disabled to participate in the American dream. To others, it represents what happens when laws applied to assist the disabled may possibly overreach and change the nature of an institution. 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 was eventually argued before the U.S. Supreme Court. Efforts have been made to ensure the accuracy of the names and facts. Although this case may be applicable in a number of legal courses, it is highly recommended for graduate Business Law courses, Employment 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 law affecting the disabled. The first objective of this case is to heighten student awareness concerning the current legal and emotional difficulties involving disability lawsuits. The second objective is to provide students with a basic understanding of Americans with Disabilities Act of 1990 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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OUTSOURCING: THE UNEXPECTED EFFECTS

Megan Burnett
Zachary Trinca
Queens University of Charlotte

Case Synopsis

Drake Dental Lab was a successful business, operating for more than 25 years in Charlotte, North Carolina. In 2007, company president Billy Drake decided to expand the business by offering new services, and announced a partnership with a dental lab in China which would handle this additional work. Outsourcing had become a popular practice in the dental industry due to the obvious labor cost advantages in countries such as China, Mexico and Costa Rica. The new department, called Drake Worldwide, had immediate success, but also triggered an unexpected reaction with Drake's domestic employees.

Employees in Drake's Charlotte facility began to have feelings of general uneasiness, as they began to worry about loss of work, as well as their job security. They felt that the outsourcing of this work was an inevitable prelude to their own jobs moving overseas. Billy Drake assured his employees that nothing was different for them, that the workload at Drake Dental Lab was unchanged, and that he had no plans to ever outsource any of their jobs. The employees remained skeptical, and their concerns began to seep into the overall quality of their work. Verbal reassurance had not been enough to ease his employees concerns, and Billy Drake needed to devise a new strategy to counteract this situation before morale and quality of work worsened.

Case Objectives and Use

The objective of this case was to research varying employee motivation techniques that could be implemented if necessary into a company who is facing motivational related problems for whatever reason that are affecting the employees performance, and thus the performance of the company as a whole. This case is structured so that the reader can make their own recommendations as to the methods that should be implemented to help resolve the situation present in this particular example. Not only is it important for students to understand this from a human resource perspective but also a company which is facing motivational related problems that, for whatever reason, are affecting the employees performance, and thus the performance of the company as a whole.

The case, based on an actual business and using primary data, could be used in undergraduate classes in human resources management, management principles, or strategic management.

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THE CASE OF THE NORTH AMERICAN GINSENG INDUSTRY: AN OPPORTUNITY FOR BUSINESS IN WEST VIRGINIA?

Christopher M. Cassidy
Dallas Brozik
Marshall University

Case Synopsis

This case provides students with information on ginseng production and wild ginseng harvesting in North America. Students are asked to develop a strategic plan for the commercialization of “a new Ginseng Business” in the State of West Virginia, a state which currently allows wild ginseng harvesting but has little commercial production.

This case details the actual state of the ginseng industry in North America in 2008 and provides students with the opportunity to draw conclusions about opportunities in that industry for various regions in the US. Relatively complete and accurate information is provided on the current market and legal restrictions in West Virginia. Partial information is provided for several additional ginseng growing areas in North America. More information can be collected (or provided by the instructor) for other regions so that students can better evaluate specific regions or the entire North American Market.

Case Objectives and Use

This case is suitable for use in courses such as Strategy, Entrepreneurship, and Business Ethics. A great deal of revenue and expense data is available for students to use in developing plans for entering this industry. Although competitive information is nonexistent for embryonic industries, there is sufficient market information for students to deduce the competitive and cooperative conditions which will exist for about the first decade.

Markets for depletable resources, such as salmon, anchovies, beaver, mink, tiger, rhino horn, elephant tusk, whale oil, timber, petroleum, natural gas, gold, silver, clean air, clean water, and ginseng, have specific characteristics that are well understood and are subject to a phenomena referred to as the tragedy of the commons. Markets for depletable resources imply the presence of ethical rules regarding conservation. Some of these markets are both depletable and renewable which implies the presence of additional ethical rules regarding stewardship.

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CHARLOTTE-MECKLENBURG FORENSIC MEDICINE PROGRAM

Allison Clark
Carolyn Parsons
Queens University of Charlotte

Case Synopsis

Charlotte-Mecklenburg Forensic Medicine Program is a descriptive case analyzing how one devastating situation can be the start of an idea to build a training program on how to collect proper evidence in order to hold perpetrators accountable for their actions.

Jayne Batts, the director of the program, realized the significant amount of improper care of evidence in the medical environment from the amount of criminals getting away with their actions. She was a lady driven to protect the community. Hospitals, police departments, and universities shared her concerns and they all collaborated to begin the program. With her willingness and determination, she filled the niche of developing a course for nurses and other emergency assistants to become certified and learn the right procedures. This process was put in place to collect efficient evidence that will uphold in court for the conviction of the criminals. A football player kills his child's carrier and luckily gets convicted through the help of a nurse who documents the discussion of the victim on her deathbed. This little knowledge from the forensic nurse was able to put the player in jail for life. Eight years later, a teenager is abducted from a bus stop, raped, and then dropped off. Through the organized steps and effective collections of substantial evidence, the criminal was pulled off the streets for more than forty years. CMF Program has a long-term goal of expanding to other counties. They have to continue the increase of successful court cases and prove to the community the amount of help they are providing before they will get over the obstacle of expansion.

Case Objectives and Use

This case describes how an entrepreneur's strength of mind benefited and increased the safety of the Mecklenburg County. Starting from scratch conjures up major issue and usually leads to failure; however, with her willpower, she was successful in creating the first forensic medical training program. From here on, the program has huge potential to expand incredibly or stay within the same area and result in little enhancements.

This case, based on actual criminal cases and use of data obtained from the directors as well as interviews with the detective and district attorney of Mecklenburg County, can be used in an entrepreneurial class and for a marketing plan on how to promote a good idea. The information presented leads for a discussion of analyzing a decision-maker approach and contemplating the pros and cons in a business perspective.

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DUELING QUEENS

Veronica Cooley
Lauren Sanchez
ShaRon Spry
Jennifer Zapatka
University of South Carolina

Case Synopsis

David Stokes had just started in his position as the Director of Student Activities and Residence Life at Haygood College, a small, historically black college in the southeast, where Greek Life was a very dominant component of the campus culture. One of the first duties David was responsible for was supervising the members of the Orientation Team, so within three weeks of starting his new position, he was presented with an issue they were all struggling to deal with.

His predecessor in his new position, Cheryl Gray, had made several errors in regard to one of the most important traditions at the College, the election of Miss Haygood College, who was a woman chosen by the students to represent the College on a national level and serve several prominent roles on campus. The errors that Cheryl had made had impacted the outcome of the competition, resulting in the wrong woman being announced as the winner. This was meant to have been kept confidential, but it was somehow leaked to the woman who was supposed to have been Miss Haygood, but had been announced as the runner-up. The sororities of both woman got involved and demanded corrections for the mistakes that the College had made. They went as far as to involve parents and lawyers, resulting in Cheryl's dismissal as the Director. When David was hired, he was not made aware of these conflicts that had left a dark shadow on the Director position, but he was faced with upset and angry students within three weeks of arriving on campus.

Case Objectives and Use

This case, based on an actual situation, shows that individuals can be faced with an ethical dilemma in which the decision was already made, but they are then left to deal with the consequences. Specifically, it deals with a difficult office dynamic, student conflict, earning trust, and improving institutional practices for the future. It also explores the unique characteristics of Greek Life at a historically black institution, and provides a learning experience for those who have never worked at or attended an HBCU. This case is meant for an audience of professionals and graduate students in the field of student affairs. It can be used for class discussions as well as training and professional development opportunities; to gain insight on some important ethical issues and allow individuals to talk through dilemmas which they may someday face themselves.

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UNITE FOR SIGHT

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

Patricia M. Fekula
Colorado State University

Case Synopsis

Unite For Sight® is a 501(c)(3) non-profit organization engaged in efforts worldwide to provide eye care to underserved communities. It was founded in 2000 by a sophomore in her college dorm room. Since then the organization has been responsible for providing eye care services to more than 600,000 people, including over 18,000 sight-restoring cataract surgeries. Over 5,200 trained volunteers have helped in this effort.

During the winter of 2008 Patricia Fekula began the lengthy process of applying for a volunteer position with Unite for Sight to assist eye care professionals and their local clinic in outreach programs. The application process was very thorough and the front-end organization done via the website was highly structured. Her preparation included training in basic eye care functions by a licensed optometrist. In June of 2008 she boarded a flight in Denver on her own enroute to Ghana, Africa. Through informal e-mail contact she was able to connect with two other volunteer college students at JFK airport before boarding the flight to Accra, Ghana where they would have their first face-to-face contact with Unite for Sight personnel. She recounts her experience as outstanding, worthwhile and a highly motivating factor in her pursuit of a career in optometry. Over a two-week period her team visited various remote villages where she personally gave care to as many as 150 people in one day. Throughout her stay in Ghana she was given use of a global cell phone to stay in contact with her parents. On her second day in Ghana she became ill and needed medical attention. Although she could speak with her parents, it was unclear what, if any structure was in place locally to handle such a contingency. She was unsure of what to do, where to go, or whom to ask for help. Needless to say, her father’s reaction was one of panic.

Case Objectives and Use

This case is an excellent example of an outstanding organization engaged in social service and healthcare. The structural aspects of organizational theory can be applied to a growing organization with a worldwide reach. In particular, authority, control, and supervision issues in remote locations can be used to assess the appropriate amounts of centralization and decentralization needed in these types of organizations.

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THE CASE SETTING FORTH A UNIFORM STANDARD FOR ESTABLISHING AN “ADVERSE EMPLOYMENT ACTION” REQUIRED FOR BRINGING A RETALIATION CLAIM

Marka B. Fleming
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Case Synopsis

Sheila White was hired for the job position of a “Track Laborer” with Gang 321 in the Maintenance of Way Department at Burlington Northern & Santa Fe Railway Corporation (“Burlington”)’s Tennessee Yard in Memphis on June 23, 1997. Because of her prior forklift experience, soon after White arrived on the job, she began working as a forklift operator under Gang 321 Foreman Bill Joiner. In September 1997, approximately three months after arriving on the job, White made her complaints of harassment and discrimination known to Joiner’s supervisor, Marvin Brown. Thereafter, Brown removed White from the forklift position and assigned her to a standard track laborer position. White was also suspended for insubordination. After exhausting her administrative remedies before the EEOC, White filed a legal action against Burlington alleging sex discrimination and retaliation in violation of Title VII. After considering the evidence before it, the jury returned a verdict in favor of White on her retaliation claims. On June 22, 2006, the United States Supreme Court held that there was a sufficient evidentiary basis to support the jury’s conclusion that Burlington’s actions of reassigning White from the forklift position to the standard truck laborer position and suspending her without pay for 37 days constituted an adverse employment action. By reaching this decision, the Court articulated a uniform standard for determining whether an adverse employment action required for bringing a retaliation claim exists. Before this decision, there was a lack of uniformity and the federal circuit courts were split on the proper standard to use.

Case Objectives and Use

This case provides an opportunity for the student to view the United States Supreme Court’s contemporary approach of expanding the scope of retaliation claims, and its recent stance of setting forth clear standards when these claims are involved. This case should be used in instructing an undergraduate student studying the employment law area in either Business Law or Legal Environment. Also, this case could be utilized in teaching an undergraduate student in a human resource management course covering pertinent employment laws necessary for human resource management.

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SELWYN PUB

James Foster
Steven Cox
McColl School of Business
Queens University of Charlotte

Case Synopsis

Jim Foster had established the Selwyn Pub in Charlotte, NC, 17 years ago, and each year revenues had grown. Last year, however, the rate of growth had slowed considerably. Eighty percent of the revenue was generated from the sale of alcoholic beverages and only 20% from food purchases. Sales were concentrated in the summer months. Three years ago, he enclosed the patio area in the winter and concentrated on improving the food served. However, these actions had not resulted in any significant growth in food sales. Although there was a loyal group of long term customers, this group had not grown significantly over the past few years. In a recent student survey, the Pub had not done as well as Jim had expected against his competition. Jim had never advertised the Pub, relying instead upon word of mouth to build the clientele. Jim, for the first time, was seriously considering an advertising campaign to revitalize the client base and increase revenues especially during the slow winter months.

Case Objectives and Use

In this real life case, students must determine how the owner of a successful pub can maintain a successful brand image developed over the past 17 years, increase revenue and broaden the customer base. The case challenges the student to develop an integrated marketing communications plan which reaches a geographically and demographically concentrated target market with a very limited budget.

The case should enable students to: (1) develop a promotional plan and budget which will increase revenue and patronage for a small entrepreneurial business, (2) demonstrate how different elements of the promotional mix can be used synergistically. The case writers developed the case for undergraduate and graduate courses in marketing, communications, and entrepreneurship.

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GLORY FOODS COMPANY

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Moore Foods

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Case Synopsis

The Glory Foods Company Case deals with a medium size manufacturing and marketing company owned and operated by African Americans. There are strategic management, marketing, financial, production/operational, and supply chain issues presented. Additionally, social/cultural, economic, and political/legal factors impact on the profitable operation of the business. These internal and external issues require students to make a comprehensive case analysis using financial and production/operational information. Additionally, students must analyze the supply chain issues in the case.

In nearly all the classes where the case has been utilized, student discussions focused on the company's ownership, their strengths, and the issues facing them. A second major topic of discussion was how the business could generate more revenue, contain costs, and be more profitable following a backward vertical integration strategy. This case produces very good discussions and students find the issues of supply chain management very challenging. 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.

Case Objectives and Use

The case has been used in Strategic Management, Small Business Management, Entrepreneurship, and Marketing Management classes at both the undergraduate and MBA level.

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DON'T UNITED WAY PRESIDENTS DESERVE TO BE PAID TOO?

Edward Jernigan
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Case Synopsis

On Tuesday, June 26, 2008, an investigative reporter for WCNC-TV, a local station serving the Charlotte market, revealed that: “The United Way of the Central Carolinas paid its president more than \$1.2 million last year” (Watson, 6/26/08). The uproar that arose in the community led to the resignation of the local United Way Board Chairman, the restructuring of the United Way Board, a \$15 million campaign shortfall for 2008, innumerable cynical comments from members of the local community, a 25 to 30 percent staff reduction by the United Way, the termination of the United Way President, and the filing of a discrimination complaint with the EEOC by the ousted United Way President.

The local United Way President, Gloria Pace King, was considered to be one of the best United Way CEOs in the country. During her 14 years as president, the charity had experienced significant growth, and Ms. King had received awards for her contributions to the community. Once it became public, Ms. King’s compensation package was widely condemned in the community at large and had been characterized as “grotesque” by the head of a national charity watchdog group. Information that came to light following the initial investigation revealed that the Executive Committee of the Agency’s Board of Directors had made the decision to raise Ms. King’s total compensation in order to supplement her retirement. The decision was made without providing complete information to the full Board. There were expressions of concern in the media that the Agency could be in violation of IRS rules governing charitable organizations. The question on everyone’s mind was: “How could this happen?”

Case Objectives and Use

The case provides opportunities for students to (1) explore the ethical issues involved with pay and compensation for top level managers and (2) to consider the ethical and oversight responsibilities of Boards of Directors.

This case is based on an actual event using secondary data sources. The case was written primarily for use in undergraduate principles of management courses. However, the case could also be used in courses on leadership, crisis management, crisis communication, and corporate governance.

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ALWAYS LIGHT, PLC

Keith C. Jones
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Case Synopsis

Penny was concerned over the most recent sales numbers she had received for the Always Light line of products. While the distribution channel was somewhat limited, based on previous conversations with the channel members they had established rather conservative sales projections and now the results were lagging those projections. Penny is now faced with trying to determine how to make major changes in the marketing program for the Always Light product line or face the possibility of losing the company.

Case Objectives and Use

This case is relatively robust and can be used in several different levels of courses. The primary target for this case is the Senior level Marketing Management Capstone course. The case incorporates the issues of channel design, IMC design, sales projections and results, product line and positioning decisions, and quantitative information allowing for the use of metrics and analysis application. This case can also be used in a Marketing Communications/Promotions class with an emphasis on the IMC. Depending upon the structure of the class and the directives provided, this case also provides excellent discussion materials for an Introduction to Marketing/Principles of Marketing course. In the introduction course the case can be subdivided to fit the specific topic matter of lecture.

This case is based on an actual company but the name has been changed to hide the identity of that company. The data provided in the case is based on the actual results.

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PUT YOUR SHOES ON AND COME TO THE CARNIVAL: SHOE CARNIVAL, INC.

Jessica Kasemeyer
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Case Synopsis

Shoe Carnival, Inc., started with the dream of a shoe salesman: People were dancing in the store aisles and having fun buying shoes. He wondered why the shoe buying experience in real life couldn't be a "fun" experience. With this vision, David Russell opened a shoe store, followed quickly by two more. After an IPO in 1993, the company continued expansion, with a total of 57 stores in 13 states.

Russell turned over leadership to a new CEO in 1996 and a new management team corrected some internal problems. However, the unique shopping experience continued to be a centerpiece of the company. Stores had jukeboxes, interesting contests and even a "money wheel" that customers could spin. Employees were expected to be up-beat.

The economic problems of 2007-2008 brought difficulties to shoe retailers and Shoe Carnival struggled. Share price tumbled from a high of \$34.34 in March, 2007 to below \$9 a share in November 2008. Management confronted a need to make some changes – and soon.

Case Objectives and Use

This case could be used in a course in Strategic Management/Business Policy or in a Marketing course. The unique shopping experience at the heart of the company's strategy offers examples of how to develop an ambiance that can instill customer loyalty. At the same time, this commitment to the in-store experience can be seen as an impediment to taking advantage of new technology as competitors have.

Barney's VRIO model could be used to determine if the company's resources are indeed rare and not easily imitable. Also, an examination of the general environment, looking especially at technology, economic factors, and demographic factors would offer a useful learning situation.

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THE TALBOTS, INC.

Maureen LaPorte
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Case Synopsis

The Talbots, Inc., a retailer of women's classic apparel and accessories since 1947, had a clear target market in the 35-year-and over age group. Its core customers tended to be professional women for whom tailored business wear was important. But by 2006, Talbots seemed to have lost its focus and was encountering serious financial problems. Sales had declined dramatically, with the company's clothing designs viewed as dowdy and out of touch with customer needs. Also, Talbots had been rapidly expanding geographically and expanding into men's and children's wear. A new CEO, Trudy Sullivan, came to the helm in 2007 and developed plans for a turnaround.

In 2008, as Sullivan tried to implement a new strategy, economic recession hit retailers hard. Talbots was still struggling to find its niche. It had strayed from its original base and felt a need to return to its roots. But the environment around it had changed and its competitors were turning to more contemporary designer styles. Talbots needed to find a route to establishing a distinctive competence. What could the company do?

Case Objectives and Use

The Talbots, Inc., is well suited to a course in Marketing or Strategic Management. The company began with a clear customer-oriented focus that targeted a well defined target market. The case would lend itself well to the issue of segmenting a market, whether by age, interests, lifestyle, or other means. The expansion into men's and children's wear provides an example of straying from the perceived target market with dire results. A marketing class could also assess the turn-around plan of the new CEO and provide alternatives.

Similarly, a Strategic Management course could use Talbots for an in-depth analysis of the industry and the general environment. A Porter's Five Forces model would be helpful in examining the role of suppliers, potential substitutes, potential new entrants, and especially the customer.

A close look at the financial statements would enable a discussion of the merits of the J.Jill acquisition. Has J. Jill contributed to the overall corporate strategy? Did Talbots pay too much for the company? Also, the rapid expansion (opening 50 new stores in 2007) could be used in a discussion of sustainable growth.

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A CHILLING DISCOVERY AT FROZEN FOODS, INC.

John Leaptrott
J. Michael McDonald
Russell Kent

Georgia Southern University

Case Synopsis

This case deals with the challenges faced by a new C.E.O. in assuming control of a company with a long established management team who had a very close relationship with the previous C.E.O. Ruth Davis, the C.E.O. of Family Foods, has inherited the entire business after the unexpected death of her father, the founder and C.E.O. Upon taking over the company and getting to know the situation facing her, she discovers a pattern of behaviors, decisions, and issues related to that management team that does not reflect an organizational culture that is as professional as what she'd like to see. The organizational culture is particularly troubling for her in two important ways. First, the members of the management team don't seem to be showing her the respect that she feels she deserves. More importantly, she is concerned about a potentially unethical relationship between the management team and a key vendor. She wonders what she should do about the relationship between the company's purchasing agent and that vendor which may have resulted in a significant additional cost to the company.

Case Objectives and Use

This case is intended for an undergraduate or graduate course in Small Business Management, Business Strategy, Business Ethics, or Principles of Management. Key topics for discussion include ethics, codes of conduct, organizational controls, organizational culture, and change.

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IT'S NOT OUR FAULT

Deanna R. D. Mader
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Case Synopsis

It's 9:30 on an average Monday morning two weeks after Spring graduation. A small group of faculty has gathered in the departmental office. One, Joe, has a 10:00 class during this onerous fast-paced four week Interim term. The others include a hodge-podge of eager tenure-seekers, true workaholics, and one just trying to get a head start on class restructuring for the Fall semester. Kidding and chit-chatting no one really pays attention as the Departmental Secretary's phone rings. The Secretary's normally cheery voice turns solemn rather quickly. It only takes a tiny wave of her hand to hush the gaggle of faculty. Clearly, something is amiss.

The group's attention is now focused on her as she turns and asks, "Have any of you had a Jeremy Oxnard in class?" Joe responds immediately, "Oh yes, a really bright kid, but really messed up on drugs and booze. Did he finally get caught and land in jail?" Joe's demeanor turns suddenly as the Secretary announces, "This is the Dean's Office. They just found the boy's body at his parents' house; a suicide." Joe interjects, "That's awful, but not unexpected. Now folks, remember, we are not babysitters. This is not at all our responsibility." The mood is somber as emotions and questions quickly emerge. One had noticed alcohol on his breath. One talked of a terrible attendance record. One talked about the glazed look in his eyes. Should something have been said? Should faculty have gotten involved? Where do intervention and right-to-privacy collide? What should his peers have done? In what seems like a heartbeat it's 10:00. Joe apologizes to the group and bolts out the door to class. As the door shuts gently behind him the remaining faculty hear him say, "Remember, he graduated two weeks ago, and anyway, it's not our fault."

Case Objectives and Use

This sad, but true, case is appropriate for a variety of audiences and settings. The primary objective is to encourage students, faculty, and/or administrators to explore their feelings toward, knowledge of, and opinions about what role each group should have played. It is appropriate for Business Ethics, Introduction to business, and University Orientation courses. It also can be used as a tool for faculty development forums or during new faculty orientation programs.

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RETURN TO SHADY WATERS CAMPGROUND: RESPONSE TO A NEW FORM OF COMPETITION

Fred H. Mader
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Case Synopsis

In 2006, Paul and Trina, the owners of Shady Waters Campground, first entered into the formal strategic planning process. Changes in the economic environment, the competitive environment, and proposed changes in the regional transportation infrastructure indicated both opportunities and challenges that had to be considered. They weighed various options that focused on both maintaining the status quo and expanding services and amenities. After much analysis and soul-searching they decided that maintaining the status quo was appropriate. After all, they had owned Shady Waters for 13 years. Through capital investment, sweat-equity, and a steadfast focus on customer service they had built a loyal clientele with a waiting list for riverfront lots. Located at the confluence of the Ohio River and Crab Creek, near Gallipolis Ferry, West Virginia, this seasonal family campground was and, at least for the time being, is doing quite well.

As they anticipate the 2009 season, Paul and Trina fear the impact of a new and little known form of competition; the condominium-style campground. This idea had been mentioned to them in 2006 as an option for the future of Shady Waters, but they had not given it serious consideration. To their surprise, during the 2008 season such a campground was announced and would be located less than three miles downriver. Open houses have been held and lots have been sold. Paul and Trina take this new development very seriously. They perceive it to be a significant threat. They realize that many campers desire to own their own small piece of riverfront property. Several long time clients over the years have purchased single home lots along the river, but the condominium approach makes the ownership option realistic for a much wider target. Paul and Trina must evaluate this new challenge and decide what actions to take.

Case Objectives and Use

The primary objective of this case is to allow students to develop a course of action for a non-traditional small business. The secondary objective is to allow students to develop operational tactical plans to accomplish the goals of any course of action selected. This case involves an actual business and is most appropriate for Strategic Management/Marketing Strategy and Small Business courses. It also can be utilized in Services Marketing and Promotion Management courses

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CIRCUIT CITY STORES, INC.

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Case Synopsis

The company that was to become Circuit City—originally known as Wards when it began in 1949--came to prominence as a novel way to sell a new product, television. Later it excelled in selling consumer electronics in a large store setting. Its early success waned, however, as competitors, in particular Best Buy, out-maneuvered the company.

By 2002, Circuit City fell behind Best Buy in sales and profits and began re-structuring the following year. The company laid off many employees, dropped its commission-based compensation system and closed many stores. In the process, the company lost a large number of experienced salespeople. The company tried to simplify the shopping experience for customers and create more streamlined operations. A new company logo was also introduced and store design was radically altered to mirror that of competitors.

In 2006, Circuit was profitable, but sales and earnings declined precipitously in 2007 and 2008. Management tried various remedies, including closing more stores, focusing on “five core values” and instituting a special employee training program. These efforts did not meet with sufficient success. Activist shareholders were calling for the resignation of all board members, saying that the solution to Circuit City’s problems was not “in changing real estate; the solution is changing the way they operate in existing real estate.” September 23, 2008, found a new CEO, James A. Marcum, pondering what could be done to save Circuit City.

Case Objectives and Use

This case could be used in a course in Strategic Management as an example of a company that failed to keep up with the times and made some strategic errors. Circuit City found early success, but neglected to keep an eye on costs and on customer service. A comparison with Best Buy would be instructive in how to effectively compete. When pressured by poor performance, Circuit City brought in new ideas, but did not implement these well; many of the new initiatives seem to only be given lip service.

A SWOT analysis and a comparison of common-size financial statements with those of competitor Best Buy would show that Circuit City’s cost structure was higher than the competition. Also, examining the strategic moves Circuit City took in order to improve performance shows unintended consequences. Firing the most experienced salespeople, for example, reduced costs, but left the company with an inexperienced sales force.

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HEIFER INTERNATIONAL

Dominique McCraven
Mary Kay Sullivan
Maryville College

Case Synopsis

Heifer International began with a simple idea. Founder Dan West believed that a solution to world hunger was “Not a cup [of milk], but a cow” –not just giving food, but providing a gift that would multiply and could be passed on to others. The concept of “passing on the gift” gained traction and what would become Heifer International thrived with its twin objectives of enhancing human dignity and reducing world poverty. This mission continued as the organization grew to encompass over 867 active projects in 53 countries and 28 states of the U.S. in FY 2007.

The case in 2008 finds current CEO Jo Luck in her office in international headquarters musing over what the economic recession might mean for donations. At the same time, the organization has been subject to some criticism for building a new, energy-efficient headquarters building instead of using the funds to help the poor. Yet the sustainable design of the building reinforces a part of the organization’s mission of sustainable agriculture. Funding is clearly a problem for a non-profit organization, but Luck strongly believes that the need is great and urgent.

Case Objectives and Use

Since the organization is not-for-profit, this case would be appropriate for a course in Nonprofit Management, but the organization’s unyielding focus on its mission makes it also appropriate for a course in Strategic Management. The evolution of the organization from simpler times to the present would offer opportunities to explore an analysis of the external environment in tandem with the organization’s strengths and weaknesses.

Porter’s Five Forces model could be effectively introduced with the use of this case; this would make clear the importance of suppliers (in this case, suppliers of capital, i.e., donors and grant-making entities) to a nonprofit organization ... as well as other aspects of the model. Discussion could productively consider whether the concept of “industry rivalry” is useful when analyzing nonprofits.

Also, the concept of leadership in action is an interesting aspect of this case. What has enabled Jo Luck to be successful during her 20-year tenure with Heifer International?

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FAIR VALUE ACCOUNTING: A NEW PROBLEM OR NEW OPPORTUNITY?

Robert McDonald
University of New Haven

Case Synopsis

Carl Burnett, an eight year veteran of bank accounting and the new assistant controller of a small bank in a suburban area, looked forward to his assignment to lead the bank into fair value accounting. Four years ago Carl had finished a master's degree in accounting at the same time he completed his CPA, and he viewed himself as well versed in accounting theory. He believed in an expanding use of fair value accounting and did not see much benefit from the historical cost basis of accounting.

Carl knew the senior operating managers of the bank had decades of experience in banking, but they were somewhat skeptical of this major shift in financial reporting. These bank managers joined the many observers of US capital markets who blamed "mark to market" accounting for the market disruptions in 2008. He had to first convince those managers to adopt fair value accounting, and then he had to convert the bank accounting systems to institute those changes.

Case Objectives and Use

This case will introduce the requirements of FAS 157 and FAS 159 for fair value accounting and the objectives of the FASB in pushing fair value accounting. A short discussion will cover the advantages and disadvantages of fair value accounting. The case will focus on the three levels of input data used in setting prices for securities and the range of choices available to management in selecting securities to be valued by fair value accounting. These accounting statements allow fair value accounting choices to be made on both the asset side and the liability side of the balance sheet.

The case is intended for courses in intermediate accounting and financial statement analysis on the undergraduate or graduate levels.

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A PROPERTY TAX SCANDAL: WHO SHOULD HAVE CAUGHT IT?

Gwendolyn McFadden
North Carolina A & T State University

Jean T. Wells
Howard University

Case Synopsis

Walters was employed by the Washington, D.C.'s Office of Tax Revenue for over twenty years. Among other things, she was responsible for processing refund checks, payable to property tax owners who had been overpaid. From 1989 to 2007, Walters devised a system in which she generated property tax refund checks which she ultimately cashed or deposited in personal bank accounts that she controlled. Initially, only small amounts of money were taken. However, after promotion to manager within her unit, Walters became bolder and more aggressive with her scheme. This case describes the \$48 million headline scandal leading to Walter's arrest and criminal indictment.

Case Objectives and Use

Although the case has extensive criminal law implications, here, it is designed to be used in an undergraduate accounting class to supplement a discussion of internal controls. A sound system of internal controls requires that basis control processes exist. Yet, a system of internal controls does not rest on processes alone. This case provides an excellent example of this principle and demonstrates that the ethical culture in the Office of Tax Revenue played a significant role in the Walter's ability to circumvent the system of internal controls. From this case, students can apply principles of internal controls by evaluating the system that existed in the OTR. Additionally, ethical issues raised in this case can be discussed.

The data from this case were gathered from court documents.

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BUREAUCRACY IN ACTION: DESIGN FLAWS OR OPERATOR ERRORS?

Thomas R. Miller
The University of Memphis

Case Synopsis

The case focuses on the challenges of working effectively within large, centralized organizations that have developed elaborate operating policies and procedures. The organizations in the case are large state universities, but the problems presented are characteristic of many large enterprises.

Last August, Dr. Al Fenton, a professor of international business at Evergreen State University, was asked by his colleague and friend Dr. Phil Jordan, Associate Dean of the Business School at Chatham State University, to deliver a series of lectures and seminars for students and faculty at Chatham. The negotiations and scheduling for Fenton's visit were handled by Jordan, Dr. Joe Dobson (MBA Program Director), and Laura McAlpin (Administrative Assistant for Graduate Programs). In October, Fenton came to the Chatham campus and successfully presented the programs.

Early in January, Jordan received a call from Fenton, who informed him that he had not yet been paid for the programs. Surprised and embarrassed by the news, Jordan assured him he would look into the matter and take necessary action to correct the problem. His investigation revealed a series of problems with the handling and processing of the Fenton's contract documents. Indeed the further he got into the matter, the more complicated and confusing it became. The analysis of the participants' actions illustrates how difficult it can be to correct a transaction that was mishandled at several points and involved the interacting bureaucratic processes of two large state universities.

Case Objectives and Use

The objectives of the case are to illustrate and explore some of the salient characteristics of bureaucratic organizations, to demonstrate difficulties of working with rigid, complex, detailed procedures, and to show the problems and confusion that can result when several people are involved in and share responsibility for an assignment.

The case is based on field research and is intended primarily for use in undergraduate courses in organization and management, management principles, and organization theory. Issues in the case relate to several specific topics, including bureaucracy, delegation, authority and responsibility, informal organizations, policies and procedures, and organizational communication.

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QUATTRO TECH

Rebecca J. Oatsvall
M. Tony Bledsoe
Meredith College

Case Synopsis

Starting, managing and sustaining are key elements in the entrepreneurial process. For the sole owner/proprietor this means having responsibility for the growth and development of each of these. Growth produces dramatic changes for the venture that in turn means changes for the owner. This case is about an owner who faces challenges of executive maturity, shared governance and staffing that may be addressed through strategic planning. It is about a small business owner who established and has grown a manufacturing operation to the point that he has to consider how to move to the next level of development. This means placing more focus on the external environment through strategic decision making.

Case Objectives and Use

This case challenges the student to develop a strategic plan for the organization and examine issues involved in moving from a small entrepreneurship to a larger multifaceted organization. The student is asked to identify characteristics of entrepreneurs and to consider differences between entrepreneurs, leaders and managers. Students are asked to examine the issue of appropriate funding sources and the implications of each source. Issues of shared decision making must also be addressed as students advise the owner as to the appropriateness of an advisory board. This case is appropriate for upper level business courses whose emphasis is on strategic management. Students should have completed basic business courses prior to analyzing this case.

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JST PRESS

Susan D. Peters
Francis Marion University

Jerry Kirkpatrick
California State Polytechnic University

Case Synopsis

James Scott Tames, a marketing professor has decided to release a soft cover version of his *The Economist's Attitude Toward Advertising*. The earlier, hard covered version had been released using a traditional publisher and traditional publishing methods. Being less than satisfied with the results, Tames reacquired the rights and opted for self publishing this time.

The case presents the reader with his options in self-publishing and the related marketing of the book.

Case Objectives and Use

The essence of this case is the preparation of a marketing plan. The information for the plan is woven into decisions about self publishing versus traditional publishing and may prove challenging for an individual project in a lower level class. Students should also be to analyze the pros and cons of pricing, distribution and promotion choices.

In an undergraduate Principles class, the case may be illustrative of the types of decisions to be made in the 4 P's and the interrelatedness of these decisions. Please note: the absence of clear cut choices may be a bit frustrating at this level.

In an undergraduate capstone or MBA level, a more thorough consideration of the options and costs associated with each option can be pursued. At this level, the less well defined choices may be handled better.

In a small business/entrepreneurship class, this case could be used to develop a marketing and business plan. Other aspects of entrepreneurship may also be examined such as why entrepreneurs get into business/get their ideas, Tames' preparedness for being an entrepreneur and the like.

The case is a thinly disguised version of the experiences of one of the co-author's experience in self publishing.

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ERP IMPLEMENTATION AT VETERAN'S AIR SERVICE (VAS)

Richard G. Platt
Martin Hornyak
Nicole Jones
University of West Florida

Case Synopsis

A major part of Veteran's Air Service's (VAS), Systems Training & Control Systems' (STCS) success is from implementation of its Oracle Enterprise Resource Planning (ERP) system. Oracle ERP encompasses various modules for manufacturing, projects, supply chain, accounting, human resources, and warehouse management providing an integrated database for controlling business activities. Since Oracle, revenues increased by more than 300% from 2003 to 2007 and a VAS strategic goal is to be a leading mid-size defense technology company. To assist in accomplishing this, VAS plans to pursue an active company acquisition policy to help increase its resource base. When doing this, the organization must remember that any new acquisition must be able to integrate successfully with the Oracle ERP system currently being used by VAS. What do the members in VAS's STCS unit have to do in order to insure proper implementation of the ERP in the new organizations? What are the situations and issues that need to be addressed ?

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 a company in the Northwest Florida area during attempts at improving its organization's information technology and infrastructure. It provides an additional perspective to discuss about how and why organizations have to plan effectively for future planning and activity. 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, behavioral, and project management skills are important to use in other situations similar to this and should be able to explain why.

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HONOR AND REMEMBER

Tim Redmer
Gray Roberts
Regent University

Case Synopsis

Honor and Remember is a decision case focused on the possibility of creating a not-for-profit 501(c)(3) tax exempt organization to support a national movement to honor and remember fallen soldiers.

George Lutz, the protagonist in the case, is the father of Tony Lutz who was killed in action in Iraq approximately three years ago. George has been dealing with the grief of losing a son in battle and trying to find a way to bring honor to his son's death and others who have died in battle. He was surprised to learn that 1.6 million of our country's finest service men and women have died in battle since the founding of our country. He was equally surprised to learn that there has never been an official symbol to honor and remember the ultimate sacrifice of these heroes. George has come upon an idea to develop a flag specifically honoring and remembering the fallen heroes. He believes he would have to develop a not-for-profit organization to support this national movement. However, he is just one individual, with limited personal and financial resources, who has never worked in the not-for-profit arena. George does not have the expertise or knowledge on how to conduct such an extensive endeavor.

The dilemma facing George is how to bring honor to our American heroes while at the same time not setting himself up for possible failure by taking on a movement which could quickly become much greater than he is capable of handling.

Case Objectives and Use

This case provides the user with an entrepreneurial situation where a quick decision is required. Typical issues facing an entrepreneur in how to start a not-for-profit business are evident. The project has a distinct time frame for decision purposes and there is the potential for this organization to experience very rapid expansion or suffer a very humiliating failure.

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 not-for-profit 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.

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AVESSA INC. BUSINESS DECISIONS IN A DIFFICULT ECONOMY

Lynn Ruggieri
Roger Williams University

Case Synopsis

The entrepreneur of a salon and day spa had recently completed a move to a highly visible and desirable location. The number of clients requesting services increased dramatically after the move which was very costly. The move required a bank loan to pay for new equipment and leasehold improvements. Suddenly there was a downturn in the economy and customers were no longer spending discretionary income on hair color and spa treatments. The owner had seen a significant decrease in sales and a significant increase in expenses and wondered how she would cover costs.

The owner was approached by a stylist with the idea of renting a chair from Aversa. The stylist would be independent of the business and have her own clients. The operator would pay a fee to Aversa for the use of the chair. Aversa would have very little control over the stylist but receive a weekly rental fee either as a flat rental payment or a percentage of the stylist's gross receipts or some combination of the two. The pros and cons of this arrangement are explored. Aversa always operated with several employees but had found there was great turnover in the industry and it was difficult to keep employees, however she had two full time employees that were working out well and wondered what the impact of such an arrangement would have on them.

Case Objectives and Use

The owner has been in business for 15 years and has expanded the facility and range of services offered several times. The owner now must decide whether to take a different direction and, instead of employees that she controlled, to rent a chair to a stylist that was not affiliated with Aversa. The business could use the rental income but is the cost too high?

The case should enable students to (1) Consider the ramifications of such an arrangement (2) Consider the impact of the arrangement on employees (3) Identify the liability and business risks (4) Analyze the business choices. (4) Recommend a direction for the business. The author developed this case for undergraduate courses in Small Business Entrepreneurship, Management, and Human Resource Management.

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MIKE'S LANDSCAPING – WHAT WENT WRONG?

Lynn Ruggieri
Norman Sargent
Roger Williams University

Case Synopsis

The entrepreneur of Mike's Landscaping had spent the last twelve years as a correctional officer for the state of Massachusetts where he had an extremely stressful and dangerous job. He had become increasingly frustrated with his job at the prison and began working for a landscaper cutting lawns part time. Mike soon changed his schedule to devote more time to building up his own clients and then made the move to give up his correction officer job and run a landscaping business full time. The business needed a loan to pay for new equipment but the loan came with requirements. The loan required the hiring of two full time employees and the increased costs of those employees was significant for the new business. The loan was also secured by Mike's residence which already had a variable rate first mortgage.

Since the lawn care season in New England is approximately four to five months in length Mike thought he should offer the additional services of fence installation and snow plowing in the winter. After purchasing the necessary snow plowing equipment the New England area saw two of its warmest winters ever resulting in little, if any, snow to plow. The owner was becoming overwhelmed in terms of the direction of the business and the ability to satisfy the terms of the loan for the equipment purchases. He no longer had the security of full time employment and tried desperately to make the new business work.

Case Objectives and Use

The owner had been successfully working part time as a landscaper and sought to expand the business and operate it full time. The owner needed to decide what services to offer in a business that was seasonal and also needed to fulfill the requirements of the loan taken to finance the purchase of the equipment.

The case should enable students to (1) Consider what goes into the planning process of starting a new business (2) Consider the safeguards against failure (3) Identify the liability and business risks (4) Analyze business choices. (4) Consider the ramifications of taking out a loan to finance the business expansion. The author developed this case for undergraduate courses in Small Business Entrepreneurship and Management.

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LEWIS COLLEGE OF BUSINESS STUDENT RETENTION AND DROPPING UNDERGRADUATE ENROLLMENT

Dale H. Shao Rachel Lewis Allison Armstrong Matt Helm
Heather Burchett Ashley Ross Jason Marsh
Marshall University

Stephen P. Shao, Jr.
Tennessee State University

Case Synopsis

Marshall University, located in Huntington, West Virginia, was established in 1837 when residents of Guyandotte and the farming region nearby turned their attention to providing better educational facilities for their sons and daughters. Degrees in business have been offered since 1921, with the BBA offered in 1954. In 1969, the College of Business was created as a separate unit of Marshall University, and in 1997, the College of Business was accredited by the Association to Advance Collegiate Schools of Business (AACSB). In September, 1996, the College of Business was named for Elizabeth McDowell Lewis and has since been referred to as the Lewis College of Business.

As a result of the declining population of West Virginia and, consequently, the declining pool of high school graduates, the competitive market for these students has intensified. As educational standards are rising across the country, business degrees are becoming more standardized and competitors must compete more aggressively. Innovation is becoming increasingly important to this industry and is necessary to develop competitive advantages that help to differentiate one business school from the next.

Threats to the LCOB include the population of West Virginia is declining and the average age of a student is increasing. There is not much diversity within the LCOB and there has been a significant decline in the LCOB enrollment. The LCOB is losing students and the faculty is underpaid. Due to the rising popularity of online degrees, having no online business degree makes for another threat to the LCOB.

Case Objectives and Use

This case provides a unique opportunity to address how an organization must adjust its strategic plan to deal with a dramatically changing environment. The firm must ask questions such as whether it can survive in its present form or whether it must make significant adjustments to its basic structure to thrive in this new environment.

The case is based on an actual university and is relevant to strategy, ethics, IT infrastructure, marketing, and e-Commerce courses, as well as other related courses. This case is relevant to undergraduate and graduate courses.

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MERRYLAND AMUSEMENT PARK: COLOSSAL OPPORTUNITY OR TITANIC PERIL

A. Gregory Stone
Regent University

Case Synopsis

Tony had to make a decision! The owners of Merryland Amusement Park, a derelict "50 acres of fun!" amusement park in Kansas City, had again put the attraction up for sale after several failed attempts to reopen the park. Merryland officially closed its entrance gates to the public in 2007. If Tony waited too long, his colossal theme park dream would vaporize. If he acted too quickly, he could be getting the keys to the Titanic. Poor financial management and other factors contributed to the owner's decision to close sell the park. Tony had investors, and they were ready to move. They wanted him to take action before the end of the quarter, even in the face of poor park performance—or, in this case, non-existent performance. Tony's entrepreneurial magic was just what the enterprise needed, and great for providing fun activities for disabled children. Tony wanted to buy the park, make the renovations, and reopen it under new management. Three unique purchase options meant the decision day had arrived. Choosing the right plan could make or break his career, his life, his reputation, and all of his personal relationships. The Merryland Theme Park entrepreneurship case study, based on a real closed theme park in Kansas, introduces the intricacies and processes involved in turning around an inactive, outdated, maintenance starved business enterprise.

Ethics, core values, potential greed, financial independence, and how past experiences can influence future opportunities are undercurrents in this case. Tony possesses basic Judeo-Christian core values. Critical decision points press him to integrate his values with the differing needs of all the potential stakeholders. Tony's decisions will impact his ability to govern, be profitable, and survive the currently-inoperative business.

Case Objectives and Use

The objectives of the case include:

- Differentiating between entrepreneurial strengths and weaknesses, and market opportunities and market threats.
- Developing a purchase strategy that balances the entrepreneur's vision with those of the key players.
- How to distinguish it from other theme parks while cultivating its own brand differentiation while implementing a new corporate identity and marketing program.
- Exploring renovation costs, new attraction expenses, real estate valuation, cash flow projections, seasonal operations, and the governing control required to achieve viable operations and profitability.

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THE PUZZLED ATTORNEY

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

Case Synopsis

Jonathan is a 35-year old attorney. For about seven years, he practiced in a rather loosely defined partnership with another lawyer in town. About a year ago, he left the law firm to open his own office. His practice is still small but it is growing. Currently, he does not really specialize in any particular area of the law. He believes, however, that he could become more successful if he could specialize as a trial lawyer. His wife, Suzan, is a part-time investor, managing a modest portfolio of stocks and bonds. She is also a part-time self-employed transcriptionist for several local medical practices.

Jonathan and Suzan own three rental houses in town and a condominium at the beach that is rarely rented out. The couple also operates a golf-cart leasing business that Jonathan inherited when his father passed away three years ago. So far, the couple has not taking any steps to structure the legal form of their businesses. However, their CPA recommended that they consider creating separate legal entities for their business undertakings. He suggested that this strategy would better protect their personal assets and could have potential tax advantages. Jonathan and Suzan are now wondering what legal form would be best for their various businesses.

Case Objectives and Use

This case is intended for upper-level undergraduate classes discussing forms of business ownership. It could be used in a small-business management course or an entrepreneurship course. The case can also be used to discuss ownership forms in business law and taxation courses. The case provides a realistic scenario of a couple that is engaged in a variety of businesses. Students will be asked to evaluate advantages and disadvantages of corporations, S-corporations, LLC's and trusts and to make recommendations for each of the business activities described in the case. Students should consider asset protection and income-tax and employment-tax consequences. The case is based on real data collected from several small business and professionals. The case provides both financial background and descriptive information for each of these activities.

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THE SAD CASE OF THE PROFESSIONAL SERVICE ZEALOT

Fred A. Ware, Jr.
Valdosta State University

Case Synopsis

The case opens with a business professor tediously and with feelings of futility, compiling and documenting his yearly accomplishments into a faculty activity report as a prelude to a formal performance appraisal evaluation and chance for a merit raise. Convinced that the system only rewards published research, he acquiesces that a raise is not likely this time around; in the past year he had chosen to put most of his non-teaching effort into his secondary interest after teaching, namely professional service. The professor and his academic colleagues agree with chagrin the seeming inevitability of “publish-or-perish.” It is shown that although outstanding service can be rewarded, too much time in that arena can penalize the participant. Frustration is observed at the next level: The department as a whole far exceeds performance standards, yet merit raises are not allowed for individuals unless they meet minimal publication goals each year. The business college dean views the scenario with concern about meeting individual publishing goals for reaccreditation reasons. His unit’s apparent lack of interest in institutional self-governance as a measurable type of institutional service is noted. The dean further contrasts highly visible community service with sporadic publishing numbers over time. The professor is unexpectedly appointed by the top state-level educational administrator to lead a search committee, further disrupting his urgent need to publish. As reaccreditation looms, the university’s top administrators provide some practical and hypothetical remedies in light of the “service zealot’s” quandary.

Case Objectives and Use

A major objective of the case is to open an examination of the service expectations of faculty in contrast with the other traditional obligations, particularly scholarship as measured by published research. Once the topic is addressed, one finds significant literature on the subject to allow the instructor to guide students of higher educational administration or trainees such as deans and department heads in any discipline toward optional avenues of investigation, discussion, and creative thinking.

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SOAPS AND SUDS

Kathleen Wates
Michael Ritchie
University of South Carolina Aiken

Case Synopsis

Maurice and Harry had been friends for many years. They had also been business partners for the last 25 years. They formed M & H Enterprises in 1985 with the purchase of one laundromat. They now had seven locations with storage buildings at two locations. Now that they were both retired from their regular jobs, they had to decide what to do with the business that they no longer wanted to be tied down with. In good times there would be no problem selling it. The real estate was worth much more than they had invested. They could sell the real estate and “give away” the laundry equipment and still end up with a considerable profit. But now that the bottom had dropped out of the economy, selling their laundromats and storage buildings was not going to be easy. They were trying to decide what all of their options were and what the best way was to market their properties.

Case Objectives and Use

This case presents several questions that must be considered when partners decide to sell their lucrative laundromat and storage building business. It requires students to look at different ways of selling a business, financing options, and determining the proper pricing strategy to promote a quick sale. They also must consider the strong desire of the partners to sell the business even if it means selling at a bargain price. It was written for undergraduate courses in Small Business Management, Entrepreneurship, or Strategy.

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BOTH HANDS CAUGHT IN THE COOKIE JAR: WASHINGTON D.C. \$48 MILLION LOSS

Jean T. Wells, JD, CPA
Howard University

Gwendolyn McFadden, JD, LL.M., CPA
North Carolina A & T State University

Case Synopsis

This case chronicles how the \$48 million dollars in checks stolen by one DC government worker was deposited and cashed by friends and family members – even when the checks were not payable to them. How could the thief ensure that such large check amounts could be deposited or cashed by individuals whose names did not match the check payees? Obviously, with the aid of bank employees. According to court documents, about \$34 million passed through Bank of America (BOA); \$17 million was personally handled by one bank manager. This case details how the bank manager processed the checks and how he was eventually discovered.

This case generated a significant amount of media scrutiny because of the amount of money stolen and the number of years that the theft went unchecked by the DC government. This case is fascinating because even after BOA uncovered the bank manager's improprieties, the bank failed to notify the DC government about the stolen funds.

Case Objectives and Use

This case provides an opportunity to consider the legal liabilities that might be imposed on an employer for acts conducted by one of its employees.

This case, based on actual court documents and using primary data, can be used in an undergraduate Business Law I class to supplement a discussion on employment law, negligence, fraud, conversion of property and liabilities under the Uniform Commercial Code and False Claim Act.

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TRUST, BUT VERIFY

Michael Welsh
David Condon
University of South Carolina

Case Synopsis

This case study is about abuse of trust in a college community and lessons learned from the damage it caused. The facts center on a professor who ran a “Ponzi scheme,” a pyramid style scam based on enticing investors with promises of abnormally high returns. The professor used his expertise in mathematical modeling to cultivate a local reputation as an expert in economics and finance. He was equally as successful in luring investors, including a number of colleagues and the university’s foundation. But instead of investing the funds, he misappropriated them to support his own extravagant lifestyle.

By the time federal regulators uncovered the scam, the professor had bilked over \$66 million from investors, including a significant portion of the university’s endowment. The university president, its board, employees, and individual investors had trusted the professor, because they felt that they knew him well enough to forgo formalities like checking his license and references. In doing so, they made a common but fatal mistake.

Case Objectives and Use

This case provides an opportunity for leaders of colleges, universities, and other nonprofits to confront the real world implications of failing to fulfill fiduciary obligations. Transparency and accountability form the bedrock of financial management and oversight. The case illustrates why an “arms-length” approach to investing institutional resources is necessary to meet due diligence requirements, or as put by a former President of the United States, “you must trust, but verify.”

This is a factual story and is intended for use in professional development with nonprofit boards and staff. The objective of this case is to make participants aware that (1) except where expressly stated otherwise by charter, constitution, or by-law, responsibility for an institution’s financial well-being rests with the governing board, (2) the board can delegate financial management to the administration, but responsibility for oversight and accountability remains with the board, and (3) due diligence in all areas, legal, ethical, and financial, is critical to sound financial management – irrespective of the trust that is fundamental to the environment of every college, university, and nonprofit.

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~ Notes ~

~ *PRELIMINARY CALL* ~
FOR CASES, PAPERS, SYMPOSIA
Southeast Case Research Association 18th Annual Meeting
Myrtle Beach, South Carolina February 11-13, 2010

The 2010 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 16, 2009

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 16, 2009*
- Camera-ready abstracts and revised materials due: *January 11, 2010*
- To be included in the printed program, the registration fee paid by: *January 18, 2010*
- Registration & hotel cut-off date for reserving room at conference rate: *January 11, 2010*

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 16, 2009**
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 according to the instructions on the SECRA website (www.secra.org). Address questions to Tim Burson, bursont@queens.edu or 704-337-2402.