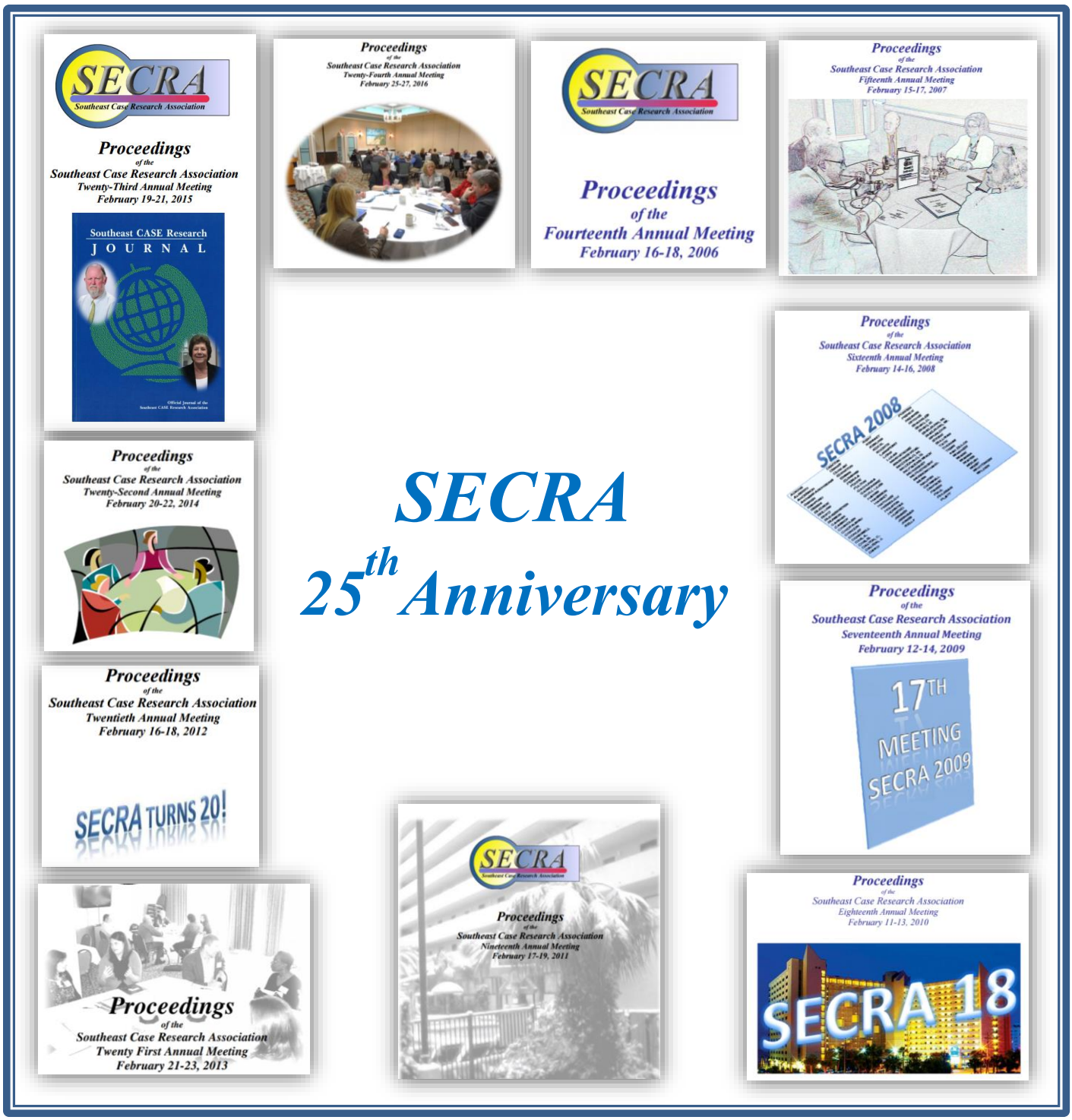

PROCEEDINGS

of the

Southeast Case Research Association

Twenty-Fifth Annual Meeting

February 23-25, 2017

Proceedings Editor: Kristie A. Abston, University of West Florida

Associate Proceedings Editor: David B. Kuhlmeier, Valdosta State University

Ocean Reef Resort

Myrtle Beach, South Carolina

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 AACSB;
- 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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FROM THE PROCEEDING EDITORS

Dear SECRA Colleagues:

If you are attending the SECRA Annual Meeting for the first time, we welcome you! If you are a returning member, we sincerely appreciate your continued support.

The SECRA officers are pleased to share that 28 embryo and full cases were accepted this year. These cases came from 55 authors representing 24 institutions in 10 different states. This diverse representation is a fantastic way to celebrate SECRA's 25th anniversary!

The 2017 SECRA Proceedings is published in two formats: this printed booklet and a flash drive, which is included in your registration package. The booklet contains a matrix of cases by subject areas, the case synopses alphabetized by the first author's last name, and a quick author reference index. The call for papers for next year's conference is also included along with additional information about SECRA.

The flash drive contains an electronic copy of this printed proceedings and full versions of the cases, instruction manuals, and/or teaching notes that are being presented at the meeting. Please be aware that there are no formatting requirements for full case submissions on the flash drive, so the cases will be in a variety of unedited formats. Some authors have requested that their full cases be withheld from the proceedings so that they may be published elsewhere. All authors are encouraged to submit their full cases to the SECRA Journal.

In the interest of protecting all authors' valuable intellectual property, please do not share the materials on the flash drive with colleagues who are not familiar with case procedures. Instead, refer other interested faculty to contact the author listed on the original case synopsis. Participants are advised that the instructor's manual and teaching notes are considered sensitive academic materials and should not be distributed to students.

We extend our appreciation to everyone who helped make this annual meeting possible, including the reviewers, roundtable chairs, and officers who work behind the scenes, volunteering their time to serve in leadership positions. Conducting this annual meeting would be impossible without your support. We encourage every member to consider serving in some capacity during the upcoming year.

Thank you for the opportunity to serve as Proceedings Editors for SECRA's 25th Annual Meeting.

Best regards,

Kristie A. Abston, Proceedings Editor
David B. Kuhlmeier, Associate Proceedings Editor

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EMPLOYEE SATISFACTION AT A CAR DEALERSHIP

Kristie A. Abston
University of West Florida

Case Synopsis

Jackson Summers was a hometown celebrity of sorts. After playing golf on a scholarship at the local university, he went on to work as a successful accountant at one of the big firms before founding a technology company. Summers sold the technology firm in 1990 and purchased his first dealership in 1995. The Jackson Summers Auto Group eventually expanded to 10 dealerships across a two-state region. Two of the dealerships routinely won national-level awards for customer service. Summers also had a big presence in the community through philanthropic support of schools, youth baseball teams, and local charities with over $300K being donated in 2015. By all appearances, the company was a huge success. Still, the leadership team had concerns that some employees were not completely satisfied with their jobs. Occasionally, a solid performer left the company to work for a competitor stating that the total compensation package was better. The leadership team searched for indicators of employee satisfaction and dissatisfaction with the total rewards and the overall management practices. They wanted to be proactive in identifying areas of strength as well as opportunities for improvement, especially regarding turnover.

Case Objectives and Use

This case provides an opportunity to analyze satisfaction survey data to assess potential sources of employee dissatisfaction at a large car dealership. Potential courses include introductory human resource management and compensation and benefits.

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PILL PUSHING: PFIZER'S ILLEGAL MARKETING PRACTICES

Katen Amin
Sandy Weiss
Saint Leo University

Case Synopsis

Competing in a pharmaceutical industry with many big players, Pfizer needed to develop strategies that would keep the company at the forefront. Their marketing strategies ultimately led them down a slippery slope of deceit and fraud. Pfizer began marketing its drugs as treatments for diseases unapproved by the Food and Drug Administration (FDA). The organizational culture focused on sales no matter the means, thus sales representatives received direction to embellish drug use claims with countless off label benefits. Furthermore, Pfizer compensated medical providers for prescribing their drugs. Solely focused on profit margins, the company put the health and safety of their consumers at risk. Did they break the law while making billions? Did they intentionally ignore the implications of their efforts on the people they served? The United States Government believed so.

Understanding the decisions Pfizer made in regards to fraudulent marketing is important as it allows for greater insight into how corporate culture can manifest into a breeding ground of unethical and illegal behavior. Sales, specifically, is rife with potential illicit behavior, whereby product usage is embellished. The actions of Pfizer depict the necessity for ethical and legal compliance and internal systems to mitigate undesirable behavior.

Case Objectives and Use

This case would be useful for both undergraduate and graduate level business courses that cover ethics, be it a course or a specific chapter. Within the realm of business ethics, it offers insight into an organization's unethical decisions and behavior. Furthermore, marketing students would gain understanding of sales techniques deemed inappropriate. As Pfizer violated the law, business law students will benefit, as the case depicts specific legal violations. Considering the case discusses the actions of a pharmaceutical company, students with a healthcare focus can decipher past unethical and illegal situations in an effort to recognize similar scenarios in the future.

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THE EPIPEN OR WHAT'S THE BIG DEAL? WE'RE JUST TRYING TO MAKE A LITTLE MONEY HERE

Joyce M. Beggs
Edward Jernigan
UNC Charlotte

Case Synopsis

During the summer of 2016, the national news reported an incredible price increase of a Mylan Pharmaceutical product called "EpiPen." Over an eight-year period, reports of a 400% price hike were noted (Willingham, 8/23/16). The public was also astonished by media reports of an accompanying 671 percent increase in compensation for Mylan Pharmaceutical's Chief Executive Officer, Heather Bresch. In 2007, Bresch's total compensation was $2,453,456, and in 2015, it was $18,931,068. In the fall of 2016, Congressional hearings were held due to the resulting public and political outrage.

The EpiPen is a medical device used to deliver a calibrated dose of epinephrine in cases of anaphylaxis, a serious life threatening allergic reaction. In 2015, media reports state that "over 3.6 million prescriptions were written for EpiPen kits (Erb, 8/24/16)." The EpiPen reportedly represents about 40 percent of operating profits for Mylan.

In Bresch's Congressional testimony, the CEO stated that Mylan Pharmaceutical produces more than 2,700 products, employs more than 40,000, and operates 50 manufacturing facilities with a production capacity of 80 billion doses annually (Bresch, 9/21/16). Ms. Bresch also stated that Mylan sold approximately 4 million EpiPen two-packs for $600 per kit making a profit of $50 per pen. In the aftermath of the CEO's testimony, Mylan announced that it would manufacture and market a generic version of the EpiPen at a price of $300 per two-pack. Later Mylan reported a quarterly loss blamed on lower EpiPen sales volumes and due to a settlement of $465 million for claims that Medicaid had overpaid the company. To date, nothing else happened from the media attention and the Congressional hearings. One report suggested that all Congress could really do was put pressure on the company.

Case Objectives and Use

This case describes an example of a company addressed by a social responsibility and an ethics issue in the pharmaceutical industry. The primary objective of the case is to introduce students to the dilemmas managers may face when dealing with a negative public response to their decisions. The case was based on published sources about an actual company. The case can be used in an undergraduate class in principles of management, in human resource management, or in business ethics. This case can be effectively used in a fifty or seventy-five minute class.

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REPLACING THE TREE

Tim Burson
Steve Cox
John Repede
Jim Foster
Queens University of Charlotte

Case Synopsis

Jim Foster scanned the arborist's report for a second time, just to make sure he hadn't missed anything. However, the report was quite conclusive; the tree had declined to the point that it would not survive another year and would have to be removed. Foster brought in other arborists for additional opinions, but they all agreed on the tree's demise. Foster, the owner of the Selwyn Avenue Pub in Charlotte, NC, had dreaded this day, as this was more than just a tree. The Pub opened for business in 1990, and the tree, a massive willow oak estimated to be more than 100 years old, sat majestically in front of the building. It was a gathering point ("I'll meet you at the big tree"), a conversation point, but was also essential to the outside seating at the Pub. The Pub's actual building, originally a single-family home, was small, with limited seating, so most customers would (and actually preferred) to sit outside. The tree provided shade and cooling during the summer months and some protection from wind and cool weather at other times of the year. It really became part of the fabric of the business, and Foster knew that his regular customers would be dismayed at the news of the tree's removal. More importantly, Foster had to come up with a plan to replace the features of the tree that benefitted his outdoor customers. Bringing in a replacement tree of that size and maturity was not an option; the solution had to be found elsewhere.

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THE FILM ALLMAN CASE

Christie Burton
Clayton State University

Case Synopsis

The Film Allman Case is the story of a film production company that experiences an accident while filming a project on location in southeast Georgia. Members of the company are a cross-functional team consisting of experienced and emerging professionals from across the film industry, led by several senior film managers. The decisions that the team makes leading up to and during the accident, as well as the factors that contributed to those decisions, are the focus of this case study. This case offers students the opportunity to discuss and apply occupational safety standards and to evaluate the team's decision-making process.

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TO BAKE OR NOT TO BAKE?

Crystal Carlson-Myer
Indian River State College

John Engel
University South Carolina Aiken

Case Synopsis

Winnie Plantain has been baking for friends and family for years with great success. Winnie is currently tired of her office job and considering opening a bakery. She has very limited knowledge of what it takes to run a bakery, but she has partnered with the local SBDC to consult with area business experts. She is also trying to decide if she wants to open a traditional brick and mortar bakery or follow the trends and start with an at home business or possibly a food truck.

Case Objectives and Use

This case study can be used in an entrepreneurship class. It presents an opportunity to evaluate the financial and technical issues facing a small business owner with limited experience in the field in which they are pursuing. It can also be used to evaluate decisions a new entrepreneur faces in deciding whether to follow the latest trends or stick with traditional business practices.

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OUTSOURCING TO CHINA: THE BENEFITS AND CONSEQUENCES OF FOXCONN'S STRATEGY

Christopher M. Cassidy
Renée Gravois
Stanislaus Solomon
Sam Houston State University

Case Synopsis

Foxconn is an electronics manufacturing company in China and responsible for producing iPhones, iPads, and Macbook computers for Apple. Foxconn is the largest employer and exporter in China. In 2010, Foxconn was surrounded in controversy regarding several highly-publicized suicides at the production facility in Shenzhen, China. During the period from 2007-2014, 39 workers committed suicide, many by jumping off buildings. Foxconn's response, of installing anti-suicide nets on the buildings earned condemnation from worker's rights groups.

Critics of both Foxconn and Apple faulted the company's management and HR policies for the suicides. Workplace accidents furthered the criticisms by making management appear to put profits ahead of worker welfare. Apple's refusal to respond to or publicly comment on the controversy resulted in customer protests in London, Bangalore, Washington DC, San Francisco, Sydney, and New York City. What should the management of Foxconn and Apple do in response to this crisis?

Case Objectives and Use

The purpose of the case is for students to analyze and discuss an organizational dilemma that cannot be easily resolved in a way that is favorable to the organization. This case is intended to present both sides of this controversy for students to analyze. The protesters presented a side focused on business ethics and the social responsibility of organizations. Poorly covered in the press and completely ignored by the protesters is the strategic management and economic perspectives for creating value through business activities. This case provides sufficient information so that students can view the controversy through both perspectives and realize that simplistic, one-sided, perspectives result in companies that are either uncompetitive or lack social legitimacy. To successfully resolve the crisis, students will need to think critically about innovative ways to solve the problems described in the case.

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SPORTS AND CRASHES

Monica Cayouette
Michelle Ziegler
Medical University of South Carolina

Case Synopsis

This case retells the interactions between a private practice general dentist and his very esthetically driven patient. The patient, Mark, is an up and coming skateboard competitor. Mark comes to his general dentist, Dr. Scott seeking treatment. A treatment plan and financial arrangements were agreed upon after a full work up was completed.

After weeks of treatment planning and discussions, Mark was finally satisfied and ready for treatment. The treatment plan was agreed upon and signed. Mark paid the usual half up front on the start day of treatment. This day Mark left with amazingly "Rad" temporaries. Mark was a no-show for his next scheduled appointment for impressions. When he did return, Mark presented with emergency trauma to his front four teeth. At this point to restore these teeth will require much more work on Dr. Scott's part, but Mark does not want to pay any more for treatment. Now Dr. Scott must decide what to do.

Case Objectives and Use

This case provides the opportunity to consider the pressures that small business owners place on ethical decision-making that affects both their business and patients. It also presents a very real situation of a newer generation that wants something for nothing. The case may be used across multiple disciplines including dental, medical, business, and/or higher education business administration. It may be used in a predoctoral setting to encourage discussion and awareness of ethical issues.

Following discussion of the case, participants should be able to:

- Have an understanding of state legal obligations of patients of record
- Handling finances in a small business
- Consider and explain appropriate course(s) of action pertaining to the patient scenario
- Ethical ramifications of all solutions to the question

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THE BEST COURSE OF ACTION

Louis D'Elia
Richard Gunter
Saint Leo University

Case Synopsis

The case describes the dilemma faced by MNU administration in addressing the specific complaints of Bob Golden, a matriculating MBA student in the online program at MNU. Bob, recognized for his persistent complaints and demands for exceptions and leniency throughout his matriculation at MNU, had once again found fault in an instructor's clearly documented grading policies. Not willing to accept responsibility for his own shortcomings, Bob brought his complaints about his current instructor, Dr. Joseph Thomas, all the way up to the Provost. However, this time, Bob came carrying some new and potentially problematic information. As it turned out, Bob had "discovered" that Dr. Thomas had pleaded guilty to a felony many years ago. Therefore, MNU had to decide not only what to do about Bob's new grading complaint, but on the appropriate course of action as it related to Dr. Thomas as well. The case further highlights the ethical and legal challenges that confronted MNU. Ironically, the class which Adjunct Professor Thomas taught was the final and capstone class of the MBA program, and one with a considerable focus on ethics and morals in business.

Case Objectives and Use

There are a number of salient teaching and learning opportunities presented in this case study. For this teaching note, we have turned our attention to two primary areas of focus with reference to two less obvious ones. The first relates to the decision to accommodate the student at different points throughout the semester, specifically as the complaints bypassed standard protocol. The other relates to Professor Thomas and whether or not he should have been given a second chance. The third was whether or not the university had a legal, or ethical, obligation to inform Professor Thomas of its findings. Additionally, did the university have an ethical responsibility to contact the other schools where Joe Thomas had been teaching?

We see the usefulness of the case in an on-line or face-to-face classroom discussion. Students can be asked to role-play, with the non-participating students commenting on the ethical decisions made by the actors/actresses. Finally, the case study can be used to test a student's recognition of the ethical and legal challenges facing MNU.

The case, based on actual events, was written for use at both the undergraduate and graduate levels as part of Organizational Behavior and or Ethics and Corporate Responsibility classes. It can also be used in business management classes whereby the student would be presented with the difficult decision of removing an otherwise model teacher. Finally, the legal issues raised make this case useful for Business Law students as well as first and second year law students.

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JACKED UP

Margriet de Zeeuw Wright
Terry A. Wolfer
University of South Carolina

Case Synopsis

Jessica Wilson had just disclosed to her field seminar class and Professor Paxton that she witnessed a child get "jacked up" by Miss Hattie, one of the workers in her field placement. Jessica was interning with the new Social Work Initiative in South Town (SWIST) in Tallahassee, Florida. SWIST was a grassroots faith-based initiative to support development of congregational social work. Jessica spent part of her time at Helping Hands, the child development center located in the Zion Moriah AME Church. She knew that Helping Hands was understaffed and currently under the supervision of the Department of Children & Families. Miss Ja'Nae, the Director of Helping Hands, had been less than supportive. Jessica was considering what her responsibilities were as a mandated reporter, and how they fit with her personal background and experience as an African American woman, and her professional social work values.

Case Objectives and Use

This case was written for a master's level capstone course in social work. It may also be useful for graduate level courses on social work practice with individuals and families or for specialized instruction on assessing child welfare issues, mandated reporting, congregational social work, gauging the limit of one's professional expertise, professional values and ethics, and supervision.

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PROTECTING CHILDREN

Sara J. English
Terry A. Wolfer
University of South Carolina

Case Synopsis

Mai Le, a young Vietnamese social worker, had recently transitioned from the role of student to field instructor. She experienced conflict between professional ethics and indigenous culture, and grappled with ways to help her Vietnamese students reconcile agency policy, professional practice ethics, and personal values. This case was written for the orientation and training of social work field instructors and field liaisons. It may also be useful for graduate level social work field seminars, courses on social work field supervision or administration, child welfare, or anyone experiencing tension between personal and professional values.

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THE ANNUAL ECONOMIC BENCHMARK REPORT: WHAT GROWTH ARE WE TALKING ABOUT?

Michael J. "Mick" Fekula
Sanela Porca
Lindsay Griswold
University of South Carolina Aiken

Case Synopsis

This case involves the relationship between the local Chamber of Commerce and a university team of professors who have generated an economic benchmark report for the past several years. The target of the report has traditionally been a general population of community members to include business persons, politicians, governmental members, and nonprofit organizations. While the report provides interesting data on economic indicators such as population, income, employment, consumer spending, real estate markets, and tax revenues, there is very little analysis and interpretation leading to implications for decision-makers who consume the report. The Chamber of Commerce president is concerned about what to tell local constituents. A major issue is both the amount and type of growth to be highlighted in the report. The Chamber desires to present economic facts that will promote growth through investment. Conversely, the Chamber does not want to promote opposition to investment initiatives when some indicators are unfavorable. Historically, consumers of the report tend to focus upon negative indicators more than positive ones. The university team is left wondering how to expand the implications and recommendations that are traditionally used to conclude the report, while simultaneously addressing the Chamber's concerns. Has the local economy recovered from the downturn of the last decade? If not, can the area get back to where it was in 2003? What initiatives are required to attract young families with children in order to establish a viable growth and promote further initiatives and investment?

Case Objectives and Use

This case provides a unique opportunity to examine a broad range of economic indicators in order to determine the appropriate recommendations for business, community, and governmental decision makers. The extensive economic data allows students to consider the type of initiatives that can impact investment and growth in the region. There is room in the case for statistical analysis to determine the existence of correlations between the economic indicators. The case presents ample opportunity for economic and strategic analyses. The complexity and broad ranging reality of this situation makes it suitable for both graduate and undergraduate classes.

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BATHROOM DILEMMA: GENDER IDENTITY!

Marka B. Fleming
Gwendolyn McFadden-Wade
North Carolina A&T State University

Case Synopsis

In January 2014, Techna County Community College ("Techna") implemented a restroom policy that required all students, employees, visitors and guests of the college to use the restroom based on their biological sex at birth. The exception to this policy would be if an individual could provide proof that he or she had undergone a completed genital correction surgery, also known as sex reassignment surgery. A year and a half later, in August 2015, Estella Cannon, a transgender female, began working at Techna, as an adjunct faculty member teaching computer classes. That same month Stephen Jackson, a transgender male, started as a student at the college. These two individuals never crossed path nor became acquainted with each other during their time at the community college. Nevertheless, they both refused to follow Techna's restroom policy.

Case Objectives and Use

This case helps students explore some potential rights that may exist under Title IX for transgender students. It also gives students an opportunity to analyze some possible rights that may exist for transgender employees under Title VII. Also, the case enables students to apply these concepts to an emerging legal issue involving transgender bathroom laws. This case is appropriate for an undergraduate Legal Environment class or an undergraduate Human Resource Management class.

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WE ARE FAMILY

Darin Gerdes
Charleston Southern University

Case Synopsis

Vincent Romano feels trapped. He just turned 40 and he is the vice-president of TRK Technology Solutions, a family business. His Father, Vincent, Sr. started the business in 1972 and it has been the driving passion of his life. As the oldest son, and the only one involved in the family business, "Little Vinny" is the heir-apparent. It appears that he holds the keys to the kingdom, but the kingdom is collapsing and he can do nothing about it.

Little Vinny has repeatedly warned his father about theft, political maneuvering, and poor management practices that were hurting the business, but his warnings have fallen on deaf ears. Throughout his life, Vincent, Sr. has relied on a few key lieutenants to run the business. They have his ear, but not necessarily his best interests at heart. Little Vinny can see it; Vincent, Sr. cannot.

Little Vinny has learned the business from the ground up and he knows what needs to change to take the business to the next level, but in spite of his title as vice-president, he cannot get his father to listen to him. He is growing increasingly frustrated as he sees the business deteriorating. He wonders how he can get his father to recognize what needs to change. Does he even have a future in the business, or should he strike out on his own?

Case Objectives and Use

The case allows the reader to experience the need to manage up and exposure to methods of influence, while reviewing common control issues in management. The protagonist repeatedly brings order to chaos, but the case highlights the difficult space where he knows the right thing to do, but he is not allowed to implement the changes.

This case is based on an actual business using primary source interviews. It was written for an undergraduate organizational behavior or management course, but it may be useful in a business ethics course. It would be particularly relevant in a specialized family business management or small business management course to deal with interpersonal relations, though the underlying principles are the same whether in a family business or corporate setting. The family dynamic just magnifies the difficulties.

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UNITS, UNITS, UNITS…FOR THE LOVE OF UNITS

Toni-Anne Gordon, DMD
Medical University of South Carolina

Case Synopsis

The case is based on a dental student that is a rising senior and stressed to meet her clinical requirements before the end of the semester. Every semester at her institution, students are required to produce a certain number of Prosthodontic units (crown, bridge, partial denture, complete denture) until it gets them to their 20 units total needed for graduation. This student cannot see how she will get to necessary 20 units, much less the number for this semester. Her team leader has tried to help her with various patients but she is coming up short.

She is assigned to a special needs patient that will need a crown (1 unit). The dental student has not treated a special needs patient before and thought she would have more faculty assistance in doing so. She runs into patient management issues with the patient as the case becomes too complex, and she is unable to adequately provide care for this patient. The patient is subsequently dismissed from the clinic and is referred to an outside facility that treats special needs patients. The patient's mother is thoroughly upset with this outcome and also at her child. The dental student is left with many questions in regards to continuation of care for that patient and her own semester requirements.

Case Objectives

Patient management in dental school can be problematic for students who are transitioning from didactic courses to patient clinical care. Furthermore, special needs patients can present a dilemma to students such as the one in this case who have very little exposure in handling this patient population. Dental students are given didactic courses on special health care needs but it is often hard to translate that into actual care. Cases such as this one highlight a provider's inability to adequately care for a patient and the obligation of a dentist to refer such a patient.

This case is based on actual events and similar events of patient management dilemmas. The objective is to help dental students and faculty in improving their patient management skills. This could be introduced in patient management courses before students enter the clinical setting or as a refresher for dental students and dentists already in the clinical setting.

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J. C. PENNEY 2017: A LIGHT AT THE END OF THE TUNNEL OR A TRAIN?

James Harbin
Brian Matthews
Patricia Humphrey
Texas A&M University-Texarkana

Case Synopsis

J. C. Penney Company, Inc., sells merchandise through department stores in the United States. The company sells family apparel and footwear, accessories, fine and fashion jewelry, beauty products, and home furnishings, as well as provides various services, including styling salon, optical, portrait photography, and custom decorating. As of January 2016, it operated approximately 1021 department stores in 49 states and Puerto Rico. The company also sells its products through its website jcpenney.com. Its headquarters is in Plano, Texas. They currently have approximately 105,000 full-time employees.

Following the recession of 2009, J. C. Penney was a stable but struggling retail chain. In an effort to reverse course, the company's Board brought in a new CEO, Ron Johnson. His tenure (2011-13) and vision for revamping the company proved to be a failure, with sales falling to $13 billion a year from a previous $17 billion. In 2013, the Board brought back the previous CEO, Mark Ullman, who immediately reinstituted old strategies. His appointment was to be a temporary fix until a new permanent CEO could be found. In 2015, Marvin Ellison assumed the CEO's role.

Case Use and Objectives

This case gives students the opportunity to evaluate the company's turnaround strategies implemented by Ellison. It would be appropriate for junior, senior and graduate students. The case may be taught in as little as one hour or could easily be expanded into two hours. Students should be required to spend a minimum of at least 3 hours outside of class to prepare for the case.

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TRENDING FIT: WINNING THE RACE IN THE RUNNING SHOE INDUSTRY

Keith C. Jones
Rosanna Crocitto
Saint Leo University

Case Synopsis

With the growth of the running and walking hobby there has been reflective improvements in the running and walking shoe retail environment. The retail industry is composed of many national chains with a strong customer following. The industry has also experienced a rise in smaller specialty shoe retailers. In that environment the competition is stiff and it is critical for these companies to find the best approach to entering the local markets. This case reviews the current practices of one such company, FITniche, which consists of three stores in the Central Florida area. The challenge facing FITniche is the necessity of maximizing customer awareness and store brand development within its current market. Like many businesses it is struggling to get the right mix.

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AT&T'S BID FOR TIME WARNER

John S. Marsh
Woody D. Richardson
University of Mary Washington

Case Synopsis

On October 22, 2016 AT&T announced an agreement to buy Time Warner for over $85 billion. Only two years earlier, executives at Time Warner advised shareholders to reject an offer of $89 billion from 21st Century Fox as undervaluing the organic growth prospects of the company.

The Time Warner acquisition followed AT&T's 2015 acquisition of DirectTV for $48.5 billion in cash and stock. The industry was changing as consumers demanded the ability to watch favorite shows anywhere, anytime, and on any device. These demands and the myriad of options for streaming and content prompted AT&T to move beyond telecommunication in the more traditional sense. There were also concerns as the disastrous merger of AOL and Time Warner was still fairly fresh (2009). While the deal was still subject to regulatory approval, it was similar to an approved 2011 merger of Comcast and NBC Universal. However, the length of time for approval coupled with the debt load AT&T would assume to complete the acquisition made some skeptical of the deal's efficacy. In addition to the regulatory hurdles and debt load issues, there was also the question of whether Time Warner was a good value at $85 billion.

Case Objectives and Use

This case developed entirely from secondary sources provides an opportunity to apply common financial management techniques to the valuation of Time Warner. The case was designed for use in a Principles of Finance or a Corporate Finance course – at either a higher undergraduate or lower graduate level. While acquisitions are fascinating from a strategy perspective and this case could be used to cover acquisition valuation, the approach in the teaching notes is designed primarily for a finance audience. The teaching notes cover the creation of pro forma statements, calculation of cost of capital, and valuation / capital budgeting techniques. The teaching notes are divided into three "assignments": one covering pro forma statements, one covering cost of capital, and one covering valuation and capital budgeting. These three concepts are three of the largest topics covered in a Principles of Finance or Corporate Finance course, and are typically covered in the first, second, and third of such a course, respectively. Depending on the instructor's preferences, each assignment could be given to the students as they complete each third of the course, or all three assignments could be given to the students at the end of the course as a large integrative project. A student spreadsheet is available with an income statement, balance sheet, and statement of cash flows to assist students with their analysis. An instructor spreadsheet is also available with completed values that were used in the answers to the discussion questions in the teaching note.

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TENURE AND PROMOTION STANDARDS: THAT WAS THEN; THIS IS NOW

Thomas R. Miller
The University of Memphis

Case Synopsis

Dr. Bill Merrill, assistant professor of management, was having a quick lunch with a faculty colleague and friend, Dr. Laura Penley. Penley was also an assistant professor who joined the management faculty with Merrill three years earlier. Merrill was relating what he learned about the work of the Faculty Personnel Committee in revising the College tenure and promotion policies. With Regency State University's strategic emphasis on becoming a major research school, the Personnel Committee was expected to recommend increasing the requirements for faculty tenure and promotion, especially in the area of research and publication. As untenured assistant professors who soon would be seeking tenure and promotion to associate professor, they were concerned since this could significantly affect their future.

A few weeks later, the Personnel Committee released its recommendations which, indeed, did raise the standards for tenure and promotion. The proposed changes were reviewed by the Dean and subsequently approved by a vote of the faculty. However, one critical issue with major implications for the junior faculty was how and when the new standards would take effect: immediately, next year, or at some later time? With this sensitive issue yet to be resolved, the Personnel Committee was reconvened and charged with recommending a plan for implementation of the new policy.

Case Objectives and Use

Set in a university that has shifted its focus to put greater emphasis on faculty research, the case deals with the impact of increasing tenure and promotion requirements on junior faculty. The broad purpose of the case is to address the issue of a changing organizational mission, the impact of resulting policy changes on employees, and how the implementation should be managed. Though the case is in a university setting, the central issue has general application since many organizations must deal with disruptive changes that affect the kind and quality of employee skills and competencies needed now and in the future.

The case is intended for use primarily in undergraduate or graduate courses in human resource management, principles of management, or higher education administration. It can be used to address course topics that include human resource strategy, change management, employer rights and responsibilities, performance management, career management, and justice and ethics in the workplace.

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SOME DAYS YOU CAN'T WIN

Susan Peters
Francis Marion University

Case Synopsis

Edita Erickson is passed over repeatedly for positions she believes she is qualified to fill. She seems to do the right things – great reviews, discussing her aspirations, asking what she needs to do and doing it – but still doesn't seem to be enough.

Is it because she is a woman? She believes it could be, but she also has some family issues that may have come into play – issues that the company is aware of. The HR director tells her it is lack of international experience – something Edita gains at great personal cost – but she still gets passed over for the "perfect fit" job by someone less qualified and without the international experience.

Case Objectives and Use

This case could be positioned for either Human Resources or Ethics. (The Teaching Note/Instructor's Manual has yet to be written as the author is debating on which way to take the case.) It examines a problem that, unfortunately, still takes place for many women.

The case is based on an actual, recent event and has been disguised to protect the identity of the protagonist. Access is available to "Edita" to gather further information to complete the case and instructor's manual.

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RIDGEWAY INSURANCE AGENCY- BUY OR PASS?

Tim Redmer
Brett Baylor
Regent University

Case Synopsis

Robert Morris, a successful insurance agency owner needed to decide whether to purchase the agency of another agent that was leaving the business. This was a major purchase. Robert estimated that the agency would cost between $500,000 and $565,000. Typically agencies in this market sold for about 2.2 to 2.5 times the revenue (commission payment to the agency). Robert was intrigued by the opportunity to grow his business and expand into another market. Based on his review of the key financial metrics of the agency, Robert had concerns that needed to be weighed before a final decision could be made.

Key Words

Financial Statement Analysis
Financial Statements
Small Business Acquisition

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MY FILLINGS ARE KILLING ME

Walter Renné
Lindsey Hamil
Medical University of South Carolina

Case Synopsis

Dr. Isa Luke was stunned. *Did I hear that correctly? Did she say she wanted me to remove ALL of her fillings?* Grace James was a 65 year-old patient who presented to the dental clinic for a new patient comprehensive examination. She arrived carrying several bags with papers hanging out and a curious binder full of papers that she set-aside before her examination. Dr. Luke, her new dentist, introduced herself before doing a full series of radiographs (x-rays) and performing a comprehensive examination of the Grace's teeth and mouth. She concluded with an excited smile under her mask that the patient was in perfect dental health. She was actually going to be able to give someone good news today. Her existing restorations looked amazingly well in spite of lack of recent cleanings and her health was unremarkable.

Dr. Luke was shocked to realize that Ms. James attributed her dental fillings as the reason behind her newly diagnosed arthritis and as perpetuating her chronic migraines. She was taken back and unsure how to respond. After collecting her thoughts, Dr. Luke tried to begin sharing evidence from the ADA indicating that silver fillings proved safe and had no evidence of contributing to illness based on a large-scale, NIH funded study.

As Dr. Luke looked closer at Ms. James' mouth, she started considering what it would take to replace all the silver fillings with ceramic or tooth-colored materials. As she surveyed her extensive dental work, Isa realized that if she agreed to remove these fillings the cost to Ms. James would quickly add up to over seven thousand dollars. She couldn't help but think about how slow this month had been financially and how worried she was about being able to finally pay off her dental school loans. Dr. Luke struggled to find an answer for Ms. James.

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COFFEE OF THE KUNA: $30,000 IN 30 DAYS

Mark Simon
University of Michigan, Flint

Rodney Shrader
University of Illinois at Chicago

Janell Townsend
Tianxu Chen
Oakland University

Case Synopsis

Sixteen Monroe University business students spent a week in Panama teaching an indigenous people, the Kuna, concepts such as savings and budgeting. Upon returning to the states; although burdened by schoolwork and jobs, four students decided to do more. Increasing the villagers' coffee yield, which was less than 33% of what it should have been, would generate the profits needed for necessities like medical care and education. The villagers required a greenhouse, quality seed and cultivation workshops to increase yield, but this required money!

Calling their initiative Coffee of the Kuna (CK), the group tackled the challenging task of crowdfunding. Utilizing a site called DoingGood (DG), CK decided to raise $30,000 in 30 days by e-mailing all its contacts to request contributions. Unfortunately, crowdfunding usually requires teams to reach their goal or forgo all the money, and CK had only raised $8,763 by day 15, perhaps because DG's site frequently froze up.

In desperation, the team hosted its own donor site, carried around "swipers" to collect contributions, and accepted checks off site. CK also asked people who gave once to give again, established matching donations, and even personalized e-mails. Members organized or attended over a dozen events to solicit donations and generated extensive publicity, even being featured on a TV news show. But with just 24 hours left, CK was $5,228 short of its $30,000 goal. Exhausted, the group wondered what to do.

Case Objectives and Use

This case provides a unique and exciting vehicle to launch a graduate or an undergraduate entrepreneurship course. The case is an excellent way to start the semester because it introduces many topics crucial to the entrepreneurial process, including the need for entrepreneurial passion, strong social networks, and an emergent strategy. Two of the four authors participated in the crowdfunding campaign, which gave them in-depth first-hand knowledge of the journey. They observed the techniques CK members used to secure contributions, as well as "softer" information such as the members' feelings and motivations. The students gave the authors full access to all data including timelines of donations, e-mails, and other promotional materials.

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TO SCREEN OR NOT TO SCREEN?

Ralee E. Spooner
Lindsey M. Hamil
Medical University of South Carolina

Case Synopsis

Two dental students, Michelle and Ashley, are completing an initial examination of their patient, Mrs. Anderson. Part of their routine examination involves an oral and oropharyngeal cancer screening. During the examination, Ashley notices some inconsistencies in Michelle's oral cancer screening technique. She is not sure if she should say anything to her classmate or if she should just keep her concerns to herself. In the case described here, internal conflict resolution and ethical principles of dental care will be presented and discussed.

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SHOULD THEY STAY OR SHOULD THEY GO?

Ellen Stevens
Jonathan Krispin
Mark Wills
Valdosta State University

Case Synopsis

The owner of The Beanery Coffee Roasters, Kurt, has an opportunity to move his small wholesale/retail coffee roasting operation to a new location nearby. By moving to this location with improved retail visibility, he would increase retail sales and expand community engagement opportunities, but would also increase overhead costs and incur the fixed costs of moving. The roasting operation would be subject to uncertain new ordinances in the new location, and he would give up the freedom of operating in a neighborhood with few restrictions and no neighborhood complaints about smoke discharge from the roasting process.

On the face of it, moving to a better retail location seemed to be a no-brainer. Were there hidden risks or overhead costs that had not occurred to him? The new location seemed to be a good one; would it be good enough?

Case Objectives and Use

The case is appropriate for upper-level small-business management and entrepreneurial skills courses. Students have the opportunity to exercise critical-thinking, strategic analysis, and management decision-making skills through the analysis of a small-business venture that is looking to grow and is presented with an opportunity to relocate to a new facility with both relative strengths and weaknesses. It is designed to be used as a stand-alone case requiring an estimated two hours of class time and four hours of out-of-class preparation. It may also be used as an ongoing case to be used as a scenario within which numerous topics covered in small business management and entrepreneurial skills courses.

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REORGANIZING THE DETROIT INTERNATIONAL STAKE ADULT HOUSING CORPORATION

G. Jerry van Rossum
Marygrove College

Case Synopsis

The main character, John van Renswoude, finds himself in a quandary. After successfully applying for a series of grants totaling at 1.5 million dollars, the Detroit International Stake Adult Housing Corporation (DISAH), the non-profit affiliate of the church jurisdiction (Detroit International Stake of the Community of Christ) is poised for significant growth. The 20-year-old non-profit organization initially started in order to build a Section 8 and Section 202 senior citizen's affordable housing apartment complex. The DISAH's mission has expanded beyond housing and provided over a million meals though meals on wheels, and other agencies. The board also approved the launch of three Community Computer Technology Centers. Two are to be housed in Detroit urban congregations. The third will be in the senior apartment Complex. Two of the centers will be jointly managed by the church jurisdiction and non-profit.

Van Renswoude, is the new jurisdictional president a 10-year experienced administrator, was just transferred from Europe and new to the USA. The property management company is very effective, and the church jurisdiction will be working as a partner. John is faced with transforming the current Board of Directors from a ceremonial board into a working board. He must work carefully in order to maintain the authority and reporting lines of the current board president, the property management company and the church jurisdiction, while developing a reporting system that allows the nonprofit organization to support the new opportunities for growth.

Case Objectives and Use

This case provides the opportunity to consider how companies must review and realign their organizations for growth. In this case, the organization has moved beyond their initial mission's scope and must find a way to oversee the new programs. A second objective of this case is to have students explore the roles and relationships between a Board of Directors and the organization's executive staff.

The case based on actual events and an actual non-profit and using primary data was written for undergraduate courses in Organizational Behavior and Management. Current organizational charts and resumes provide additional data.

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IS INDEPENDENCE WORTH THE PRICE?

Douglas J. Wakeman
Rebecca J. Oatsvall
Susan B. Wessels
Meredith College

Case Synopsis

North Carolina Coastal Federation was formed in 1982 as a 501(c)(3) nonprofit corporation and has remained true to its mission to "empower coastal residents and visitors from all walks of life to protect and restore the water quality and critically important natural habitats of the N.C. Coast." The organization has been reviewed and audited annually as required by federal laws.

The Audit Committee was appointed in 2006 and is very pleased with their audit firm but is questioning whether they should follow best management practice and change auditors. The change would be expensive and there would be a substantial learning curve for a new auditor.

Case Objectives and Use

This case will help students understand the unique challenges of choosing an auditor for a nonprofit organization. The case is appropriate for accounting courses studying non-profit organizations as well as undergraduate auditing courses.

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MODIPALM ENGINEERING OF MALAYSIA: MOTIVATION, MORALITY, & MEDITATION

Frank Tian Xie
University of South Carolina Aiken

Talai Osmonbekov
Northern Arizona University

Case Synopsis

Modipalm Engineering Sdn Bhd is a wholly-owned subsidiary of CB Industrial Product Holding Berhad and located in Selangor Darul Ehsan, West Malaysia, about 65 km southwest of Kuala Lumpur, Malaysia. The company is a one-stop center for the design, supply, construction and installation of palm oil mills with products sold to 80 countries worldwide. Management of the company has noticed a problem with the morality and motivation of the employees of the company. There is a lack of positive attitude toward work, refusal to accept company's rules and regulations, lack of leadership quality among supervisors, and lack of teamwork spirit. The company retained the service of an American consulting firm to help with their operations management and human resources management. Upon finding that the problem with the company is not merely managerial, but also ethical and moral, the consultant decides to draw from literature on ethics, morality, compassion, altruism and ancient meditation practice based on truthfulness, compassion, and tolerance to tackle the problem.

Case Objectives and Use

This case provides an opportunity to consider an innovative approach to tackle the complicated issues concerning motivation, morality, and management, using research findings in motivational research, morality concerns, and cultivation and meditations in an international business setting where a multi-culture workforce is involved. It is found that the focal issue with employee morality at Modipalm Engineering rests on the fundamental issues of personal responsibility, discipline, ethical standards, compassion, altruism, and empathy. Only when the workers feel the intrinsic urge to be compassionate and empathetic toward others, become responsible citizens and hold up high moral standards, could the real problems of work ethics be truly resolved. The consultant offered recommendations based on research and his observation, and an action plan is provided.

The case, based on an actual business and expending findings in multi-discipline literature, was written for undergraduate and graduate courses in MBA curriculum. The case may also be used in small business management/ entrepreneurship courses to segue into behavioral aspects of international business operation.

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AUTHOR INDEX

2018 CALL FOR CASES, CASE EMBRYOS, PAPERS, & SYMPOSIA

Southeast Case Research Association
26th Annual Meeting
Myrtle Beach, South Carolina
February 22-24, 2018

The 2018 program organizers of the Southeast Case Research Association (SECRA) invite new and experienced case writers to submit original, unpublished cases to be presented at the 26th Annual SECRA Conference. Cases in early development may be submitted without an instructor's manual. Case embryos in the very early stages may also be submitted.

Complete Case & IM Submissions for full review Due: *November 13, 2017*

(Embryo Cases and Abstract submissions accepted until January 15, 2018)

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 an instructor's manual, cases without an instructor's manual, case embryos, and abstracts will be considered. All cases presented at the 26th Annual Conference will qualify for review and possible publication in the *Southeast Case Research Journal*. SECRA strongly encourages student authored case submissions and participation.

Important Dates

- Complete cases and instructor manual (IM) submissions due: *November 13, 2017*
- Camera-ready abstracts and revised materials due: *January 29, 2018*
- To be included in the printed program, the registration fee paid by: *January 29, 2018*
- Hotel guaranteed rate date: *January 22, 2018.* Late SECRA Registration Fee after: *February 1, 2018.*

Submission Information

SECRA uses the Conference Review System (CRS) to process submissions and reviews for the conference. Submit cases according to the instructions on the SECRA website (http://www.secra.org) Contact information for all officers, including the Program Chair and Proceedings Editors, can be found on the SECRA webpage.

SUBMISSION GUIDELINES: The following guidelines aid in the review and editing process. Please follow them.

1. Submissions should be formatted and submitted electronically according to the instructions on the SECRA website (http://www.secra.org/) by *November 13, 2017.* Case submissions should not include information that identifies the authors or their affiliation. Submit a separate abstract page including the author(s) and contact information.
2. SECRA strongly encourages student submission and participation. Please indicate the contact author, faculty advisor, and student author(s), as applicable.
3. Cases submitted must not have been published or presented elsewhere. Only complete cases with an accompanying instructor manual submitted by the submission deadline will be considered for awards.
4. A tiered evaluation process will examine: 1) Full Cases, 2) Embryo Cases, and 3) Abstracts. Address questions to the 2018 Program Chair, Kristie Abston, abstonk@yahoo.com, or the 2018 President, Sonia Toson at stoson@kennesaw.edu.