



Winter 2008

NACRA Newsletter

Editor: Carol J. Cumber
Dept. of Economics
Scobey 504
South Dakota State University
Brookings, SD 57007
(605) 688-4849
carol.cumber@sdsdstate.edu

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N A C R A



The 50th Anniversary NACRA Conference at the New England Center

Submitted by Marlene Reed

The survey data from our last conference revealed that the participants gave the meeting a high rating. There were 159 members in attendance and 16 guests for a total attendance of 175. The Friday night Maine lobster dinner at the Seacoast Science Center was a hit with everyone, and we thank Bill Naumes of the University of New Hampshire for his assistance with that event.

The participants praised the roundtable sessions for the useful comments they received and the cordiality of the members—two characteristics of our group that are often mentioned.

As the result of a breakfast meeting on International Case Research moderated by Jeffery Ellis of Babson, a new network is being established for members who are

involved in this type of case research. Ellis asked those who were interested in participating in the network and sharing ideas and best practices to contact Jeff Shay at the University of Montana. Jeff will be designing a process for us to stay in touch with one another.

Another session at the meeting led by some of our “Old Bears” (Tim Singleton, Marilyn Taylor, Chi Anyansi-Archibong, John Seeger, and Marie Rock) relived the history of NACRA and invited a discussion on ideas for the future of the organization.

At the conclusion of the conference, the Advisory Council (composed of past presidents of NACRA) elected Bill Naumes to become our historian and keep track of this rich history.



New England Center, Durham, NH

As V.P. of Programs for this conference, I wish to express my appreciation to all of those who helped plan and execute this very successful meeting.

A Message from NACRA’s New President: Jim Fisher

(continued on page 3)

It was the best of times, it was the worst of times. Okay, it’s not my line, but it certainly applies to our present context. No one wishes for tough economic times, but here they are, and let me just observe, as a case writer, that there is

certainly a silver lining to this current dark cloud. The stories that are daily spilling into the news represent a kind of full-employment act for us case writers—and not just those focused on business and economics. The reverberations

are likely to also be felt in public policy, education, and a host of other disciplines that consider the intersection of commerce and society. And, of course, all this is being played out on a global stage. In their own way, case

2009 NACRA Call for CASES/PAPERS/SYMPOSIA

Submitted by Armand Gilinsky, VP-Programs

October 29 – October 31, 2009
Chaminade Resort & Spa, Santa Cruz, CA

Submission Deadline: Monday, June 15, 2009

See the NACRA website for detailed submission instructions (www.nacra.net)

Conference Roundtables: NACRA's annual conference features roundtable discussions where all participants receive knowledgeable suggestions about their cases in a constructive atmosphere. The goal of these workshops is to help authors develop their cases for publication in refereed journals, such as NACRA's *Case Research Journal*, and in textbooks.

Cases may deal with any topic in any academic discipline where dynamic classroom discussion is useful. Cases must be original work based on real events, real people, and real organizations, and must not have been previously published or accepted for publication elsewhere, either in journals or books.

Paper and Symposia Tracks: Proposals for paper presentations or symposia are welcome. Past conferences have included tracks for "Teaching with Cases" and "Case Research for Theory Building and Testing." See web site for suggested areas.

Newcomers' Workshop: At the start of the conference, a workshop is offered for faculty and graduate students new to the case writing process. Pre-registration is requested. See web site for details. A special track for assistance with embryo cases of newcomers is also available; the deadline for embryo cases is September 14, 2009.

About the Chaminade Resort

The AAA Four Diamond award-winning Chaminade Resort & Spa (www.chaminade.com) is a spectacular mountaintop retreat in Santa Cruz, California. The Chaminade has a full service spa and fitness center, a swimming pool, walking and jogging trails, views of Monterey Bay, and is a certified green business. With more than 20 wineries within a 10-mile radius, the famous Santa Cruz Beach & Boardwalk is only 15 minutes away, and the Monterey/Carmel area only 45 minutes away, Chaminade is a destination resort. The nearest airports are Oakland (OAK), San Francisco (SFO), and San Jose (SJO); and the Chaminade can be reached by car or airport shuttle in around 30 – 75 minutes. Shuttle service to the resort is available.



NACRA Vice President for Programs

Armand Gilinsky
School of Business and Economics
Sonoma State University
1801 East Cotati Avenue
Rohnert Park, CA 94928-3609
armand.gilinsky@sonoma.edu

President's Message (cont.)

(Continued from page 1)

researchers studying these current events can take up the challenge to write history's first draft. The year 2008 was an economic rollercoaster, and while 2009 may have more in store, I think more attention will focus on understanding what went wrong and searching for various roads to recovery. This is fertile ground for students and teachers alike. The facts never speak for themselves, but summon us to engage, discuss, and understand... *What's the problem here?*

Continuing with this theme of economic hardship viewed through a case-writing lens, let me also encourage all of you with a stake in NACRA to continue your support of our association. Speaking at our recent annual meeting in New Hampshire, I observed that the uncertain economic environment offers the temptation, if not exactly the necessity, to



Jim Fisher
NACRA President 2008-2009

hunker down. I expect many universities and colleges are tightening budgets and may be paring down travel allowances. But make NACRA a priority this coming year. Plan now to attend our 2009 meeting at the end of October at Chaminade Resort & Spa in Santa Cruz, California. We've bought the joint out, so there will be no distractions—other than the usual self-imposed ones—as we roll up our sleeves, turn on our notebooks, and make a little history!

Letter from the Editor

Hello NACRA Members,



I am honored to have been appointed to the position of NACRA Newsletter Editor. I attended my first NACRA conference in 2000, and have participated as a CRJ reviewer, a paper presenter and track chair in the HRM, Education and IB tracks.

Whether a long-time veteran, a new member, or somewhere in-between, please consider submitting articles and announcements that I can publish for the benefit of all NACRA members. Contact me at carol.cumber@sdstate.edu.

I follow in the esteemed footsteps of Bambi Douma—thanks Bambi!

Submitted by Carol Cumber

Case Royalties

Royalty payments to NACRA by book publishers and case distributors were substantial in 2008. Of the two, case distributors contributed the largest total amount. The thirty-five members who shared in the royalties received a total of \$12,821. The largest check exceeded \$2,100.

your membership in NACRA for two reasons: to support the organization and the case research profession and to share in royalties for your published cases. In order to be eligible for royalties, you must be a member in the year in which the royalty check was received, and the aggregate member's share must exceed \$50.

Membership runs by the calendar year. Those who attend the annual conference automatically receive membership for the year following the conference. Those who did not attend the conference should renew on-line for \$50 at www.nacra.net.

Submitted by Robert Crowner

It is important to maintain



Becky Morris
Photo by Peggy Naumes

Does a NACRA member in a lobster suit eating a lobster make one a cannibal???"

-Bill Naumes

Best Practices in Case Method Instruction

Submitted by Michael F. Welsh

NACRA sustains itself as an association of scholars by encouraging its members to better understand their disciplines through case study research and how those disciplines might best be learned through case method instruction.

As an initial attempt to formulate best practices in case method instruction, several members of NACRA who had won teaching awards at their respective institutions were asked how they go about promoting learning in their disciplines. Their responses form the basis of this initial draft of a proposed NACRA publication, *Best Practices in Case Method Instruction*.

Know How People Learn

Fostering learning takes serious intellectual work (Bain, 2004). Case method instructors know from study and experience that people learn in a variety of ways, both deductively and inductively. At first learners are provided with answers (deductive) and later they pursue their own questions (inductive) as they come to master their special knowledge. Success in their life's work depends to a large degree on their ability to continue questioning and learning on their own. In the end, the best case instructors ensure that their students learn how to ask important questions that they care about answering.

Learners often show up with pre-existing notions of how the world works (Donovan, 2000). Astute case instructors find out where students are in their understandings and either build on them or challenge the misunderstandings.

Motivate Learners

Students are basically curious and learn best what most interests them. They are motivated when they can see how they can use what they are learning and can relate to it. They are discouraged when they see no relevance in what they are studying. The best case instructors assign meaningful work not busy work. And, they provide meaningful feedback on the work that students submit (more than just a grade on the top of the paper).

An interesting and interactive learning envi-

ronment motivates students especially when they are given significant roles to play. Simply being told what they need to know discourages learning.

Expect Learning

The best case instructors give their students significant control over their learning while showing strong interest in what they are learning and confidence in their abilities. They expect work that would be recognized as acceptable in the real world because it would lead to promotion. In other words, they expect students to benefit from their work and bring them, at different times and in different ways, to an "aha" moment.

Create Learning Environments

The best case instructors strive continuously to create safe learning environments where students can try, fail, receive feedback and try again (Bain, p. 60). They are interactive environments where students do most of the talking and contribute to the dialogue by sharing their ideas and understandings; where a variety of materials (cases, videos, newspapers, scenarios, etc.) are used to make concepts come alive; where special guests are invited into the classroom to serve as external judges for student's presentations (and often become mentors to the students for internships and future careers); where case protagonists are brought in to bring case studies to life, and offer practical perspectives on case problems and solutions.

Evaluate Learning and Teaching

Evaluate self on how well students are paying attention, attending class and seem interested and engaged. Assess written work and contributions (not necessarily just participation) in class discussions. I'm rather hard on myself and like to think that the best evaluation comes from the student who is five years out of school and tells you how much of an impact your class has had on his/her career. Student evalua-

tions are nice...but application to the real world is even better.

Midway through each semester, I ask students to write anonymous, "5-minute feedback" so that they may reflect on what is working in the course and what needs immediate improvement. That way, I can make mid-course corrections to better meet their learning needs. For example, some students have asked if I could wrap up class discussions by giving a "mini-lecture" to highlight aspects of management theory that may have been missed in the discussion. Others have requested that I perform a demonstration analysis of a case study, with students playing the role of questioners, in a format that is affectionately known as the "instructor grill".

I try to develop innovativeness in the students' thinking process. I look at how far they have moved along in coming up with more creative solutions to the cases. I absolutely forbid students from looking at what a company did and suggesting that was the best solution. I urge them to look at ways of solving the company's problems that may be unique but more effective. A significant portion of their grade is based upon their ability to develop these kinds of solutions. The grade for this is based upon the richness of their discussion.

We do some very creative exercises to dream up ideas for new products, services, or non-profit organizations. They keep a journal of five ideas in each category, and this journal counts for a large portion of their grade. There is a body of knowledge that is important to learn in order to speak the language of practitioners. I also evaluate the students on their understanding of that body of knowledge.

References

Bain, K. (2004). *What the Best College Teachers Do*. Cambridge, MA: Harvard University Press. (p. 49).

Donovan, M. S., Bransford, J. D., and Pellegrino, J. W. (2000). *How People Learn: Bridging Research and Practice*. Washington, DC: National Academy Press.

News from the Case Research Journal

Submitted by Tupper Cawsey

Special Issues for the Case Research Journal

The *Case Research Journal* (CRJ) will be publishing several issues dedicated to particular areas of case research:

-Ethics and Social Responsibility of Business. CRJ is working with Anne Lawrence as issue editor to have a dedicated issue. Tentatively, the submission deadline would be in Dec. 09 for publication in 2010. Details to follow.

-Entrepreneurship. CRJ intends to have a special issue of cases dedicated to entrepreneurship issues. This is planned for 2011.

-Mexican and Spanish cases. CRJ hopes to work with our colleagues from Mexico and other Spanish speaking countries to have an issue dedicated to cases from those regions.

-Canadian cases. CRJ has tentative plans to invite the best cases that have been presented at the Administrative Sciences Society of Canada during in 2009 and in previous years to be submitted to CRJ for inclusion in a special Canadian edition.

CRJ Seeking Reviewing and Editing Help

Do you want to get involved in the CRJ? While CRJ continues to get excellent cases submitted, it often could use help in editing or reviewing. If you have an interest in reviewing or becoming part of the editorial process, please let the CRJ Editor know. We are often looking for help with reviewing and we may be seeking a future Associate Editor focused on human resources / organizational behavior / ethics or on entrepreneurship. Email: tcawsey@nacra.net.

CRJ Starting a "Letters to the Editor" Page

Beginning with Issue 28/1, CRJ will have a Letters to the Editor page. We invite opinion pieces of 400-600 words on case teaching, research and writing.

Volume 28 / 1 is Ready to Go

The Case Research Journal continues to get great cases submitted. We will be publishing issue 28/1 soon and I look forward to receiving more excellent cases. If you have any questions about the journal and its policies, please contact me.

Tupper Cawsey
Editor, Case Research Journal
tcawsey@nacra.net

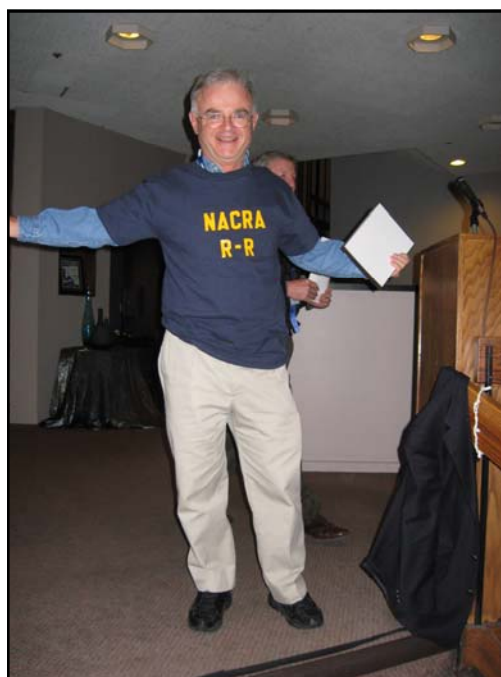


Photo by Peggy Naumes

Membership

Submitted by Bambi Douma



Just a reminder regarding membership:

If you attended the 2008 conference in New Hampshire, your membership is good through 2009. If you did not attend the conference and have not renewed your membership for 2009, now is the time to do so! Even as we work through improving the website, that is still the best place to renew your membership and update your information. Please go to <http://www.nacra.net>. If you have any problems, please email me at bambi.douma@business.umt.edu.

Photo by Steve McGuire

NACRA Officers 2008-2009

President: Jim Fisher, Saint Louis University
Immediate Past President: Michael F. Welsh, University of South Carolina
President-Elect: Marlene Reed, Baylor University
VP Programs: Armand Gilinsky, Sonoma State University
VP Programs-Elect: Jeff Shay, University of Montana
VP Case Marketing: Susan Peters, Francis Marion University
VP Membership: Bambi Douma, University of Montana
VP Communications: Mary Kay Sullivan, Maryville College (*through 2008*)
Secretary/Treasurer: Robert P. Crouner, Eastern Michigan University
Editor, CRJ: Tupper Cawsey, Wilfrid Laurier University

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APPOINTED POSITIONS:

Newsletter Editor: Carol Cumber, South Dakota State University
Webmaster: Christian Ratterman, Mountain View, CA
Proceedings Editor: Emmanuel Raufflet, HEC Montreal

Case Method Institute (CMI)

The (CMI) has started its own case collection that allows individual US authors and smaller institutions to publish case studies and have them distributed globally. There is no restriction to cases that an author may submit other than he or she must be satisfied with the quality and wish to achieve exposure for cases that otherwise might be unpublished. This clearly offers a very separate opportunity to authors than that of the *Case Research Journal* and is not intended to compete at all with the CRJ. This is targeted more as a chance for those who have authored cases that are not appropriate for the CRJ but who want to have

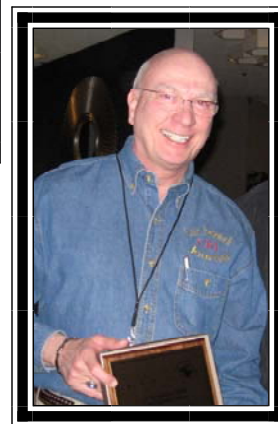
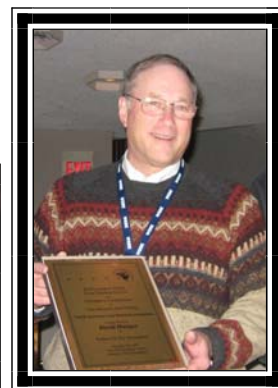
them distributed nevertheless rather than allowing them to be unused.

Case authors often lack the affiliation with an institution that has a publishing arrangement with case publishers. We at CMI believe that every case should see the light of day and be widely available to other educators. To this end, CMI has established a relationship with **ecch** to distribute any case as long as it has been tested in a classroom and the author believes that it meets his or her own standards of quality.

The Case Method Institute Case Collection thus frees individual authors and institutions in

Congratulations New NACRA Fellows!

David Hunger
Linda Swayne
Lew Brown



Photos by Peggy Naumes

Submitted by David Wylie

North America to publish cases and have them distributed globally. Royalties are paid on case sales.

At CMI, we believe that one important test of quality is the marketplace. For that reason, we do not vet any cases prior to submission.

It is very easy to submit your case to CMI for publication. Simply complete the form at www.casewriting.org and submit it. While a teaching note is not required, it often enhances case sales.

Member Recognition/Award Winners 2008:

Curtis E. Tate, Jr. Award

“Research in Motion”

Sofy Carayannopoulos, Wilfrid Laurier University

Outstanding Student-Authored Case Award

Ops/Supply Chain Mgt. – “Precision Steel”

Brian Scalabrino (student author), Nancy M. Levenburg (faculty sponsor),
Grand Valley State University

Outstanding Newcomer Case Award

Marketing – “Reebok and the U.S. Hispanic Market”

Mariana Cogan and Robert J. Kopp, Babson College

Ruth Greene Memorial Case Award

Finance & Economics – “The Betancourt Group”

Francisco J. Lopez Lubian, Instituto de Empresa Business School,
Madrid

Best Workshop Case: Gold, Silver, and Bronze Awards

GOLD

International Business – “NuComm International: Making a Call on China”

Detlev Nitsch and Tupper Cawsey, Wilfrid Laurier University

SILVER

Business Policy/Strategy – “The Road to Tortuguero”

Cheri Young, University of Nevada, Las Vegas

David Corsun, University of Denver

Daryl Loth, Casa Marbella, Tortuguero, Costa Rica

BRONZE

Business Policy/Strategy – “Cascades Groupe Tissu in 2006”

Pierre Batellier, HEC Montreal

Emmanuel Raufflet, HEC Montreal

Louis Hébert, HEC Montreal

Directors College Award for Outstanding Case in Corporate Governance

Not-for-Profit – “Governance in Times of Crisis”

Katherine Breward, University of Western Ontario

Michael Breward, McMaster University

Requests for Cases:

Submitted by Susan Peters

Susan Peters is NACRA’s New VP of Case Marketing. Please send all requests for cases to her at the following address:



VP of Case Marketing

Susan Peters

Director, Center for Entrepreneurship

Francis Marion University

P.O. Box 100547

Florence, SC 29502

Phone: (843) 661-1102

Fax: (843) 661-1188

Email: speters@fmarion.edu

This year’s NACRA Grants were awarded to:

Marion J. Tucker, John Friar, and Sagar Kamarthi

for their proposal

“Cases for a Multi-Disciplinary New Product Development Course”

Elissa Grossman and David Choi

for their proposal

“Serving a Cause for Profit, Profiting for a Cause, or Giving for No Profit”.

NACRA Is Not Just for North Americans

Submitted by Mary Kay Sullivan

There is more than North American input into NACRA’s meetings, as evidenced by the wide range of international participants at the October 2008 meeting. Here is a thumbnail sketch of just two participants as examples of the international interest in case writing seen at NACRA.

Tania Casado, a professor at the University of São Paulo, became interested in case writing and research when she participated in a Harvard Business School (HBS) project for faculty from six well-known universities in Latin America. The program’s purpose was to encourage writing of cases and teaching notes in the field of social enterprise. It certainly met with success in Tania Casado. After writing two cases and four teaching notes (all now on the HBS library site) – she began searching for more colleagues and groups that had the same interest.

Tania attended her first NACRA meeting in 2005 and has been back every year since. This past fall, she brought three graduate students with her to Durham—Leticia Menegon, Wagner Cassimiro, and Lina Nakata. The students, she reports, “really LOVED the experience at NACRA.”

“Brazil is not a heavy user of

teaching cases; our education and pedagogy methods are addressed by other approaches,” Tania says. “But now I’ve been using cases in undergrad, graduate, and executive programs.” Tania has put together a group of 18 current and former students who meet twice a month to discuss their case writing. “I’m very proud of this group. We are the only group writing cases in Brazil. I know I’m influencing new generations in Brazil and this is great,” she adds with her characteristic warm smile.

Joan Ramon Mallart, from ESADE in Barcelona, is another enthusiastic NACRA participant from beyond North America. He is no newcomer to the use of cases, since ESADE Business School, from which he graduated, has a long tradition of using case pedagogy. Joanra became acquainted with NACRA through Professor Josep Franch, whom Joanra calls “ESADE’s ‘ambassador’ to NACRA. Josep was a pioneer at that time in writing and submitting cases to the NACRA conferences. He was the one who really convinced us to submit the first case to NACRA and attend the 2006 Annual Conference at San Diego.”

Joanra used cases early in his teaching career (“I considered teaching cases as the most effective way to bridge theory concepts with real experiences . . .”) and began writing cases that drew on his consultant work.

He co-authored with Javier Busquets, fellow ESADE faculty member, cases that won the Ruth



Photo by Tania Casado

Greene Award two years in a row; “IBM Barcelona Bank” and “Banc Sabadell: Reinvention of a Bank.” Of that award he says, “It was very special for us. It motivated us to raise the bar higher for ourselves on the quality of cases submitted.”

And what benefits does he find in NACRA? “Above all, I tremendously enjoy the . . . open, constructive, and frank discussions of the conference tracks . . . and the interaction with other educators in your same situation.”

Random Moments.....

Photos by Tania Casado



Announcements from Associate Organizations:

NACRA encourages you to learn about our associate organizations and conferences by reviewing their websites. The following conference/meeting information was submitted for publication in this newsletter:

Southwest Case Writers Association (SWCRA) Annual Conference (held in conjunction with the Federation of Business Disciplines)
Oklahoma City, OK, February 25-26, 2009
www.swcrahome.org

Western Casewriters Association (WCA) (held in conjunction with the Western Academy of Management)
Zermatt Resort & Spa, Midway, UT, March 19, 2009
<http://cbe.calstatela.edu/wca.html>

The CASE Association Annual Conference (CASE) (held in conjunction with The Eastern Academy of Management)
Hartford, CT, May 13-16, 2009
www.caseweb.org

Administrative Sciences Association of Canada (ASAC)
Niagara Falls, Ontario, Canada, June 6-9, 2009
www.asac.ca

World Association for Case Method Research & Application (WACRA) Conference
Vancouver, B.C. Canada, June 28-July 1, 2009
www.wacra.org



NACRA 2009-2010

\$10,000 Case Research Grant Opportunity



NACRA will offer at least two grants to support case research during the 2009-2010 academic year.

Funding Categories

Grant proposals may target one or a combination of the funding categories described below.

- **Using Cases to Build Theory Grant:** These grants support research that utilizes case studies to generate new theories in business and administrative disciplines such as accounting, business & society/ethics, business policy & strategy, education, finance & economics, information technology management, international business, marketing, not-for-profit, health care, social work, operations/supply chain management, organizational behavior, organizational theory, human resource management, and small business management/entrepreneurship.
- **Teaching with Cases Research Grant:** These grants support research leading to a better understanding of the effectiveness of the case method of teaching.
- **Teaching Case Development Grant:** These grants support the development of decision-focused teaching case(s) based on field research and a comprehensive analysis (instructor's manual or teaching note). Fictitious cases will not be funded. Disguised cases are permitted. Funding will be awarded for projects that have not been previously presented or published at the time of the grant application. Cases should address issues in business and other administrative disciplines such as those listed above. Special consideration will be given to integrative cases designed for use across multiple courses in a business program.

The final product of the grant research is expected to be an article or case accepted for publication in the *Case Research Journal* or another appropriate journal.

Submission Guidelines are available on the NACRA website at www.nacra.net

All submissions must be received by June 1, 2009. If you would like feedback on the appropriateness of your proposal or have a question about the review process, please contact Jim Fisher, NACRA President, at fisherje@slu.edu.

North American Case Research Association

Promoting Excellence in Case Research, Writing, and Teaching

The North American Case Research Association (NACRA) is a nonprofit, voluntary professional association writing and teaching in business and other academic disciplines. We seek to accomplish our mission through a set of interrelated activities, including the following:



- Sponsoring an annual meeting for the presentation and improvement of new, peer-reviewed cases and papers on issues related to case pedagogy;
- Publishing a quarterly peer-reviewed journal, the Case Research Journal, the premier journal for outstanding teaching cases grounded in research;
- Promoting the worldwide distribution and use of NACRA cases in multiple media throughout the world;
- Providing professional development seminars and activities aimed at enhancing skills in case research and pedagogy within academic institutions and professional associations; and
- Supporting the work of NACRA-affiliated regional organizations and collaborating with other professional organizations having complementary objectives.

NACRA Mission Statement as approved by the Executive Board, February 7, 2000.

Update Your NACRA Member Information

You can update your NACRA member information on-line.

- Please visit <http://www.nacra.net>, the NACRA and CRJ website, and click on Member Services.

North American Case Research Association
 Bambi Douma, VP Membership
 MBA Director
 361 Gallagher Business Building
 School of Business Administration
 University of Montana
 Missoula, MT 59812
 (405) 243-6148
bambi.douma@business.umt.edu

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