

ABSTRACTS ONLY

**VOLUME 39
ISSUE 3
SUMMER 2019**

CASE RESEARCH JOURNAL

**OUTSTANDING TEACHING CASES
GROUNDED IN RESEARCH**

GINA GRANDY, EDITOR

**PUBLISHED BY THE
NORTH AMERICAN CASE
RESEARCH ASSOCIATION**

**IN PUBLICATION
SINCE 1980**



Outstanding Teaching Cases Grounded in Research

Volume 39 • Issue 3 • Summer 2019

Case Research Journal

Published by the

North American Case Research Association



NACRA

**NORTH AMERICAN CASE
RESEARCH ASSOCIATION**

Editor

**Gina Grandy
University of Regina**

Copyright © 2019 by North American Case Research Association, Inc. (NACRA)
All rights reserved.

Further reproduction by any means, electronic or mechanical, including photocopying and recording, or by any information storage or retrieval system must be arranged with the individual copyright holders noted.

Published quarterly by North American Case Research Association, Inc.

Cover design, Lisa Fahey, originables.com.

NACRA membership for individuals is US \$40. Subscriptions to the Case Research Journal are US \$45/year for North American subscriptions and US \$75/year for subscriptions sent outside North America.

To join, register and pay online at: <https://www.nacra.net/>

POSTMASTER: Please send address corrections to:

North American Case Research Association
Christina Tathibana, Assistant Editor
Case Research Journal
crj.christina@gmail.com

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

ISSN 2328-5095

ISBN: 978-1-7340114-1-8

Editor

Gina Grandy
University of Regina

Associate Editors

Robert MacDonald
Crandall University

Lynda Livingston
University of Puget Sound

Susan Peters
University of North Carolina Pembroke

Assistant Editor

Christina Tathibana
University of Regina

Editorial Board

William A. Andrews, *Stetson University*
Ramon Baltazar, *Dalhousie University*
Mary Barrett, *University of Wollongong*
Brent David Beal, *University of Texas at Tyler*
Karen Boroff, *Seton Hall University*
Lew G. Brown, *U. of North Carolina at Greensboro*
Alva Butcher, *University of Puget Sound*
Neil G. Cohen, *George Washington University*
Carolyn Conn, *Texas State University*
Carol Cumber, *South Dakota State University*
Eric Dolansky, *Brock University*
Timothy W. Edlund, *Morgan State University*
Lisa Eshbach, *Ferris State University*
Deborah R. Ettington, *The Pennsylvania State U.*
Caroline M. Fisher, *University of Missouri – Rolla*
Josep Franch, *ESADE Business School*
John E. Gamble, *Texas A&M Corpus Christi*
Armand Gilinsky, *Sonoma State University*
Janis Gogan, *Bentley University*
Peter Goulet, *University of Northern Iowa*
Randall Harris, *Texas A&M Corpus Christi*
Sean Hennessey, *University of Prince Edward Island*
Cynthia Ingols, *Simmons College*
Lynn A. Isabella, *Darden School of Business*
Ronald Kamin, *ISC Paris School of Management*
James Kennelly, *Skidmore College*
Anwar Khurshid, *Lahore University of Mgmt. Sciences*
Mitchell Langbert, *Brooklyn College*
Anne T. Lawrence, *San Jose State University*
John J. Lawrence, *University of Idaho*
David Lehmborg, *North Dakota State University*

Nancy Levenburg, *Grand Valley State University*
Lynda Livingston, *University of Puget Sound*
Francisco J. López Lubián, *IE Business School*
Robert MacDonald, *Crandall University*
H. F. (Herb) MacKenzie, *Brock University*
Thomas R. Miller, *University of Memphis*
Charles Mossman, *University of Manitoba*
Vijaya Narapareddy, *University of Denver*
Margaret J. Naumes, *University of New Hampshire*
William Naumes, *University of New Hampshire*
Ken Ogata, *York University*
Kay Palan, *University of Alabama*
Susan Peters, *University of North Carolina Pembroke*
Debapratim Purkayastha, *IBS Hyderabad*
Tia Quinlan-Wilder, *University of Denver*
Marlene Reed, *Baylor University*
Woodrow Richardson, *University of Mary Washington*
David W. Rosenthal, *Miami University*
Kathryn Savage, *Northern Arizona University*
Colleen Sharen, *Brescia University College*
Jeff Shay, *Washington & Lee University*
Susan Sieloff, *Northeastern University*
Javier Silva, *LAE Business School, Universidad Austral*
Ram Subramanian, *Stetson University*
Linda Swayne, *University of North Carolina Charlotte*
Denise Tanguay, *Eastern Michigan University*
Marilyn L. Taylor, *University of Missouri–Kansas City*
Sonia Toson, *Kennesaw State University*
Gerald Weinstein, *John Carroll University*
Michael F. Welsh, *University of South Carolina*
Susan White, *University of Maryland*

NACRA Officers 2018–2019

EXECUTIVE COMMITTEE AND BOARD OF DIRECTORS

President

Christopher M. Cassidy
Sam Houston State University

Immediate Past Presidents

Kathryn Savage
Northern Arizona University
and
Jeffrey P. Shay
Washington & Lee University

President Elect

Javier Silva
IAE Business School

Vice-President Programs

Eric Dolansky
Brock University

Vice President, Case Marketing

Brent D. Beal
University of Texas at Tyler

Vice President, Communications

Jane Gravill
Conestoga College of Applied Arts and
Technology

Vice President, Membership

Elizabeth Ontaneda
Universidad Peruana de Ciencias Aplicadas UPC

Vice-President Programs-Elect

Open

Secretary/Treasurer

A. Kay Guess
Samford University

Editor, Case Research Journal

Gina Grandy
University of Regina

REPRESENTATIVES OF REGIONAL AND AFFILIATED ORGANIZATIONS

Canada (ASAC)

Meredith Woodwork
Wilfrid Laurier University

Mexico (ALAC)

Adriana Ramirez Rocha
Tecnológico de Monterrey

Eastern U.S. (CASE)

William Naumes
University of New Hampshire (Retired)

Southeastern U.S. (SECRA)

Sonia Toson
Kennesaw State University

Southwestern U.S. (SWCRA)

Simon Metcalf
Augusta University

Western U.S. (WCA)

Andrew Fergus
Thompson Rivers University

Caribbean Case Researchers Association

Paul Golding,
U Technology - Jamaica

Directors at Large

Joe Kavanaugh
Sam Houston State University
U. Srinivasa Rangan
Babson College

Advisory Council Chair

Linda Swayne
The University of North Carolina at Charlotte

Advisory Council Vice Chair

Rebecca Morris
Westfield State University

Case Research Journal Editorial Policy

North American Case Research Association (NACRA)

CASE CONTENT

The *Case Research Journal* (CRJ) publishes outstanding teaching cases drawn from research in real organizations, dealing with important issues in all administration-related disciplines. The CRJ specializes in decision-focused cases based on original primary research – normally interviews with key decision makers in the organization but substantial quotes from legal proceedings and/or congressional testimony are also acceptable. Secondary research (e.g., journalist accounts, high quality website content, etc.) can be used to supplement primary data as needed and appropriate. Exceptional cases that are analytical or descriptive rather than decision-focused will only be considered when a decision focus is not practical and when there is a clear and important gap in the case literature that the case would fill. Cases based entirely on secondary sources will be considered only in unusual circumstances. The Journal also publishes occasional articles concerning case research, case writing or case teaching. Multi-media cases or case supplements will be accepted for review. Contact the journal editor for instructions.

Previously published cases or articles (except those appearing in Proceedings or workshop presentations) are not eligible for consideration. The Journal does not accept fictional works or composite cases synthesized from author experience.

CASE FORMAT

Cases and articles submitted for review should be single-spaced, with 11.5 point Garamond font and 1" margins. Published cases are typically 8-10 pages long (before exhibits), though more concise cases are encouraged and longer cases may be acceptable for complex situations. All cases should be written in the past tense except for quotations that refer to events contemporaneous with the decision focus.

Figures and tables should be embedded in the text and numbered separately. Exhibits should be grouped at the end of the case. Figures, tables, and exhibits should have a number and title as well as a source. Necessary citations of secondary sources (e.g., quotes, data) should be included as endnotes at the end of the case (not at the end of the IM) in APA format. In the IM, necessary citations (e.g., citations of theoretical work from which the analysis draws) should be included using parenthetical author/year embedded in the text (similar to a traditional academic paper) that feeds into a list of references at the end of the IM. Note that the CRJ approaches citations differently in the case and the IM given the differing audiences for which each document is developed (i.e., the case is written for the student while the IM is written for the instructor). In some rare instances, footnotes may be used in the case for short explanations when including these explanations in the body of the text would significantly disrupt the flow of the case, but generally the use of footnotes in the case should be avoided if possible.

The following notice should appear at the bottom of the first page of the manuscript: Review copy for use of the Case Research Journal. Not for reproduction or distribution. Dated (date of submission). Acknowledgements can be included in a first page footnote after the case is accepted for publication, and should mention any prior conference presentation of the case.

It is the author(s)'s responsibility to ensure that they have permission to publish material contained in the case. To verify acceptance of this responsibility, include the following paragraph on a separate page at the beginning of the submission:

In submitting this case to the Case Research Journal for widespread distribution in print and electronic media, I (we) certify that it is original work, based on real events in a real organization. It has not been published and is not under review elsewhere. Copyright holders have given written permission for the use of any material not permitted by the "Fair Use Doctrine." The host organization(s) or individual informant(s) have provided written authorization allowing publication of all information contained in the case that was gathered directly from the organization and/or individual.

INSTRUCTOR'S MANUAL

Cases must be accompanied by a comprehensive *Instructor's Manual* that includes the following elements:

1. **Case Synopsis:** A brief (three-quarters of a page maximum) synopsis of the case.
2. **Intended Courses:** Identification of the intended course(s) that the case was written for, including the case's position within the course. Please also indicate whether the case was developed for an undergraduate or graduate student audience.
3. **Learning Objectives:** The specific learning objectives that the case was designed to achieve. For more details on learning objectives, see the article titled "Writing Effective Learning Objectives" at the useful articles link.
4. **Research Methods:** A Research Methods section that discloses the research basis for gathering the case information, including any relationship between case authors and the organization, or how access to case data was obtained. Include a description of any disguises imposed and their extent. Authors should disclose the relationship between this case and any other cases or articles published about this organization by these authors without revealing the author's identity during the review process. If the case has been test taught and this has influenced the development of the case, this should be noted. This section should also indicate who in the organization has reviewed the case for content and presentation and has authorized the authors to publish it (note that this last component is not necessary for cases based on congressional or legal testimonies).
5. **Theoretical Linkages:** In this section please provide a brief overview of the theoretical concepts and frameworks that will ground the analysis/discussion of the case situation in theory and research. Please include associated readings or theoretical material that instructors might assign to students or draw on to relate the case to their field or to the course. In developing this section, recognize that business courses are often taught by adjunct faculty who are business professionals who may not be steeped in the theory of the discipline the way an active researcher might be. Develop this section with the intent of helping that type of instructor effectively apply and teach these theories/frameworks.
6. **Suggested Teaching Approaches:** Suggested teaching approaches or a teaching plan, including the expected flow of discussion with an accompanying board plan. Include a description of any role plays, debates, use of audiovisuals or in-class handouts, youtube videos, etc. that might be used to enhance the teaching of the case. Authors are strongly encouraged to classroom test a case before submission so that experience in teaching the case can be discussed in the *IM*. Authors are discouraged from including websites as integral resources for the teaching plan because websites are not static and the content of the website link may change between the writing of the case and an instructor's subsequent use of the case.
7. **Discussion Questions:** A set of assignment/discussion questions (typically three to ten depending on discipline) that can be provided to students to organize and guide their preparation of the case. For most cases, either the final or the penultimate question will ask students for their recommendation on the overarching decision facing the decision maker in the case along with their rationale for that recommendation.
8. **Analysis & Responses to Discussion Questions:** This section of the *IM* represents the core of the case analysis. Repeat each assignment/discussion question, and then present a full analysis of that question that demonstrates application of relevant theory to the case. Note that the analysis in this section should go beyond what a good student might present as an 'answer' to the question. Write to the instructor with an eye toward helping him or her understand in detail how the theory applies to the case scenario, how discussion of this particular question might be approached with students, where the limitations in the theory might be relative to the case scenario, and how the analysis contributes to the building of an integrated recommendation regarding the decision the case protagonist must make.
9. **Epilogue:** If appropriate, an epilogue or follow-up information about the decision actually made and the outcomes that were realized as a result of the decision made.
9. **References:** Provide full citations (in APA format) for all references that were cited in the *Instructor's Manual*.

REVIEW PROCESS

All manuscripts (both the case and the instructor's manual) are double-blind refereed by Editorial Board members and ad hoc reviewers in the appropriate discipline. Most submissions require at least one round of revision before acceptance and it is common for accepted cases to go through two or more rounds of revisions. The target time frame from submission to author feedback for each version is 60 days.

DISTRIBUTION OF PUBLISHED CASES

The right to reproduce a case in a commercially available textbook, or instructor-created course pack, is reserved to NACRA and the authors, who share copyright for these purposes. After publication, CRJ cases are distributed through NACRA's distribution partners according to non-exclusive contracts. NACRA charges royalty fees for these publication rights and case adoptions in order to fund its operations including publication of the *Case Research Journal*. Royalties paid are split 50/50 between NACRA and member authors.

MANUSCRIPT SUBMISSION

Submit the case manuscript and Instructor's Manual in one document via the *Case Research Journal* ScholarOne website at <http://mc.manuscriptcentral.com/nacra-crj>. This site provides step by step instructions for uploading your case. You will also be provided the opportunity to upload two case supplements – this is to allow submission of a spreadsheet supplement for the student and for the instructor if needed. No identification of authors or their institutions should appear on either the main case/IM document or on the spreadsheets. All identifying information should be removed from the file properties before submission. If you have audiovisual content to your case, please contact the editor to determine the best way to make this content available to reviewers without revealing the authors' identities.

At least one author must be a member of the North American Case Research Association. Membership dues are included in annual registration for the NACRA conference, or may be paid separately through the main NACRA website.

For questions, contact:

Gina Grandy, Editor

crj.editor@uregina.ca

Adopting *Case Research Journal* Cases for use in your classes

Faculty members can adopt cases for use in their classrooms and gain access to Instructor's Manual through one of NACRA's distribution partners.

NACRA currently has agreements with the following distributors.

- **Harvard Business School Press** (<http://hbsp.harvard.edu/>)
- **Ivey Publishing** (<https://www.iveycases.com/>)
- **The Case Centre** (<http://www.thecasecentre.org/educators/>)
- **Pearson Collections** (<https://www.pearsonhighered.com/collections/educator-features.html>)
- **McGraw Hill Create** (<http://create.mcgraw-hill.com/createonline/index.html>)
- **Study.net** (www.study.net)
- **CCMP [Centrale de Cas et de Médias Pédagogiques]** (<http://www.ccmp.fr>)
- **XanEdu** (<https://www.xanedu.com/>)

If you want to use one of these distributors, but cannot find the CRJ case you want, contact the NACRA VP Case Marketing, Brent D. Beal, bbeal@uttyler.edu, to see if we can have it added for you.

Textbook authors can also adopt CRJ cases for inclusion in their textbooks for a modest fixed royalty fee. Please contact the NACRA VP of Case Marketing for more information.

From the Editor

Welcome to Volume 39 Issue 3 of the *Case Research Journal*. In this issue you will find one article and five cases. Of those cases, there are three in Marketing, and one each in Finance and Strategic Management.

This issue starts with an article on “Writing and Publishing Secondary Cases” by Randall Harris, W. Glenn Rowe, Gina Grandy, Mahendra Gujarathi, and Maryam Memar Zadeh. This article is a transcript of the panel discussion held at the *North American Case Research Association’s* annual conference in Tempe, AZ on October 11, 2019. The intent of the panel discussion (and the article) was to discuss with case researchers the opportunities and challenges of writing and reviewing cases studies grounded solely in secondary data. In that article, as Editor I highlight the parameters of publishing such case studies in *CRJ*. Generally, *CRJ* publishes cases based solely on secondary based when substantial quotes from legal proceedings and/or congressional testimony are included – *CRJ* considers data from such sources as a type of primary data. However, it is important to note that under certain circumstances *CRJ* does publish cases grounded in secondary data outside of legal proceedings. The key consideration with such cases is that the range of sources employed needs to be extensive and diverse, and of course the case needs to be decision-focused. The article also includes a table which identifies nine cases published in *CRJ* since 2015 that were grounded only in secondary sourced data. We hope that more case researchers consider *CRJ* as an outlet for their secondary sourced cases and encourage those writers to review the identified cases in that table as examples of best practice as they prepare their submissions for *CRJ*.

In this issue we have two cases with a sustainability focus, and both look at sustainable food waste disposal decisions by grocery stores. “Meat the Needs: Giant Foods’ Meat Rescue Program” by Darrell Bartholomew, Peter F. Swan, Maggie M. Mehalko, and Richard R. Young is a Marketing case with videos components built in. John MacDonald, the Director of Marketing and Communications of Giant Foods, had to decide whether to expand or eliminate their food donation strategy, a partnership with a local not for profit Food Bank. The partner was no longer able to perform the transportation role of the donation strategy and with additional costs to bear, MacDonald had to determine how best to move forward. The second case in this area, “Baldor Specialty Foods: The “SparCs” Challenge” is a Strategic Management case written by Michelle DeMoss and Ram Subramanian. Despite efforts led by Thomas McQuillan, Baldor’s VP of Corporate Strategy, Culture and Sustainability, to dispose of waste in an environmentally friendly way, waste disposal costs were significant. McQuillan needed to develop a plan that would help the company both financially and in its sustainability standing.

Two other Marketing cases are published in this issue as well. One focuses upon leveraging sponsorship to address declining sales and the other on identifying a unique value proposition based on market research data from customer feedback. “Brita’s Stephen Curry Sponsorship Splash” by Michael M. Goldman and Maximillian M. Duran is set in the first nine months of 2016 and the Director of Marketing had to evaluate strategic options to determine how to use its sponsorship deal with basketball star Stephen Curry to contribute to a sales turnaround. The third Marketing case in this issue, “Validate or Pivot? Using Content Analysis to Assess Green Zebra’s Customer Value Proposition: Case A” is written by Charla Mathwick. Lisa Sedlar was the CEO of an urban, convenience-store start-up and was reviewing customer feedback on Green Zebra and its competitors to validate what she believed was the value proposition of the organization – one based on ‘healthy convenience’. This market research case requires the decision maker to evaluate extensive qualitative data from customers.

The Finance case in this issue, “Lockheed Martin and Leidos Holdings: A Reverse Morris What?” by Susan White, requires the decision maker, Peter Clarke, to make a personal investment decision as to

whether or not he should retain his Lockheed shares or exchange them for Leidos shares following a merger between the two organizations a year before the decision point in the case.

As always, I would like to thank the tireless efforts of our reviewers and the editorial team. Please look over the table of contents of this issue and consider using one or more of these cases in your courses, or perhaps even more significantly consider sharing the table of contents from this issue with your colleagues so they can see the interesting cases that will now be available for adoption through our numerous distribution partners, including Harvard, Ivey and The Case Centre.

I would also like to remind our readers of three forthcoming special issues. *CRJ* is hosting a special issue on **Women's Entrepreneurship** with submissions due in October 2019, as well as a special issue on **Healthcare Management** with submissions due in February 2020. Later in 2020 we are hosting a special issue on **Multi-disciplinary** cases with submissions due in October 2020. Check out the *CRJ* website for the call for cases for the special issues.

We want to encourage all of you to submit your cases to the *Case Research Journal*. Publication in the *CRJ* provides you the broadest access to distribution and as such presents the greatest opportunity for your case to have real impact on the education of students around the globe. While our review process is quite rigorous, and we necessarily reject more cases than we can accept (our acceptance rate is about 20%), we work hard to turn around case reviews within about 60 days. That means within about 60 days of submission of your decision-focused case, you will have reviewer and editor feedback and a reasonable indication of the potential for your case to earn publication in the *CRJ*. We look forward to seeing your cases.

Sincerely

Gina Grandy, Editor
Case Research Journal

Abstracts Only

CASE RESEARCH

- *Case Research* **Writing and Publishing Secondary Data Cases** 1
- *Secondary Data*
- *Primary Data*

Randall Harris,* Texas AM University – Corpus Christi, W. Glenn Rowe, Western University, Gina Grandy, University of Regina, Mahendra Gujarathi, Bentley University and Maryam Memar Zadeh, University of Winnipeg [6300 Ocean Dr., Corpus Christi, TX, 78412-5808, Randall.Harris@tamucc.edu.]

The purpose of this article is to discuss with case researchers the opportunities and challenges of writing and reviewing case studies grounded in secondary data. In general, secondary data refers to information that has been collected in a manner other than field research at an organization of interest. As such, the secondary data case writer often writes without having direct access to an organization's decision makers. In the meantime, the notion of what constitutes secondary data remains unclear. This article begins with a discussion of the definition of secondary data. Next, the article discusses a number of challenges with utilizing secondary data in case research. This is followed with a discussion of human subjects and ethical issues in secondary data case research. The authors also discuss social media as a data source for case research and how to find a decision point in what can be an overwhelming volume of information. The article concludes with a discussion of common problems for reviewers when reviewing case studies based primarily on secondary research sources.

FINANCE

- *Finance* **Lockheed Martin and Leidos Holdings: A Reverse Morris What?** 17
- *Valuation*
- *Capital Budgeting*
- *Return on Investment*
- *Aerospace and Defense*

Susan White,* University of Maryland [7621 Mowatt Lane, College Park, Maryland 20742, swhite@rhsmith.umd.edu]

Peter Clarke, Vice President of Mergers and Acquisitions for Lockheed Martin's Information Systems and Global solutions (IS&GS) division, has a personal decision to make about keeping his substantial Lockheed stock holding or converting to the partner company (Leidos Holdings) stock. About a year prior to the decision point in the case, Lockheed made a strategic decision to divest the IS&GS division, which engaged in consulting (largely defense and other governmental agency consulting). Clarke reviews Lockheed's actions which led up to the decision to divest the IS&GS division through a Reverse Morris Trust (RMT), which included rejecting a more

conventional spin-off or outright sale. The RMT, a complex transaction which required the creating of a new company and a merger with a second company, Leidos Holdings, allowed the divestiture to be tax-free. There were a number of rules required for this transaction; for example, former Lockheed shareholders needed to own more than 50% of the resulting company. Clarke believed the enterprise IT, cybersecurity, intelligence, health IT, and engineering business was a good growth area. Clarke needed first understand this unusual financial transaction and make a personal decision about whether keeping his Lockheed shares or exchanging them for Leidos shares would be the best decision for him.

Intended Courses and Levels

This case is appropriate for an MBA or undergraduate finance elective. It is appropriate for restructuring courses, as the Reverse Morris Trust has gained popularity because of the tax benefits it provides. Investments instructors can also make use of the case since it involves equity valuation and a portfolio decision; whether to continue to invest in Lockheed, or to exchange Lockheed shares for Leidos shares. The case would be particularly useful in a capstone finance course where students are expected to apply multiple finance disciplines.

Learning Objectives

When students have completed this case, they should be able to:

- Define Reverse Morris Trust, and explain the mechanics of an RMT transaction.
- List the advantages and disadvantages of an RMT (primarily tax advantages).
- Perform discounted cash flow and multiples valuations, including calculating weighted average cost of capital.
- Evaluate a firm's profitability and financial health.
- Examine an individual's portfolio choices in a corporate exchange offer.

MARKETING

- *Marketing*
- *Brand Positioning*
- *Integrated Marketing*
- *Sponsorship*

Brita's Stephen Curry Sponsorship Splash

47

Michael M. Goldman* and Maximilian M. Duran, University of San Francisco [101 Howard St, San Francisco, California 94105, mmgoldman@usfca.edu]

Brita's Stephen Curry sponsorship splash is set in the U.S. water filtration industry in the first nine months of 2016. The case documents the initial period of market-leader Brita's sponsorship of the NBA's Golden State Warriors' highly-awarded point guard Stephen Curry. Although the announcement of the sponsorship deal had generated substantial and positive media reaction, sales of Brita products were still declining nine

months into the period of the sponsorship deal, after several years of sluggish growth. The case documents the communication activities related to the Curry sponsorship undertaken by Brita's Director of Marketing, Tad Kittredge, during 2016. Given the pressure to deliver weekly sales and the regular NBA season scheduled to begin in just three weeks' time, Kittredge needed to find a way to use the Curry sponsorship to contribute to a sales turnaround in the coming months. The case offers four strategic alternatives that Kittredge was considering in October 2016 to change the way Brita used Curry.

Intended Courses and Levels

The case is best suited to an undergraduate marketing course in brand communication or sponsorship, where the focus is on the assessment of the four strategic alternatives Kittredge was considering to invest in and leverage the sponsorship.

Learning Objectives

By the end of this case study, students will be able to:

- describe the role of indirect competition in the analysis of the competitive context;
- analyze the brand positioning of a consumer brand;
- critique the sponsorship brand fit between an athlete and consumer brand; and
- critically assess strategic sponsorship alternatives and argue for a recommended course of action.

MARKETING

- *Marketing*
- *Green Retailing*
- *Product Disposition Decision*
- *Safe Food Waste*
- *Social Responsibility*
- *Sustainability*
- *Triple Bottom Line*
- *Zero-Waste*

Meat the Needs: Giant Foods' Meat Rescue Program

61

Darrell E. Bartholomew*, Peter F. Swan, Maggie M. Mehalko and Richard R. Young, Penn State Harrisburg [777 W. Harrisburg Pike, Middletown, PA 17057-4898, deb62@psu.edu]

This case is complemented with video components throughout the written narrative. The decision focuses on sustainable green retailing strategies surrounding meat donations by Giant Foods in their meat rescue pilot program called "Meat the Needs." John MacDonald needs to decide whether to expand or to eliminate the pilot program, now that the Central Pennsylvania Food Bank (CPF) will no longer be picking up the meat after 2012. Green retailing strategies include opportunities and risks. The opportunities include reducing food waste by increasing food donations; risks include risk to brand, cost, and logistics for safe food handling. Will Giant Foods' disposition decision fit with the company's new focus on zero-waste and its desired edict of "Living Here, Giving Here"? Are the risks and costs too much for the future of the program? MacDonald and his team need to work through these important sustainability issues.

Intended Courses and Levels

This video case is for a sustainability course or as a component of a general business or marketing course. The topic of sustainability is touched on in many business and marketing textbooks today. The video case is appropriate for an undergraduate audience. The primary focus of this video case is sustainable green retailing strategies involving opportunities and risks of food donation and food waste reduction.

Learning Objectives

By analyzing this case, students will learn to:

- Assess and discuss green retailing strategies, including zero-waste and the Environmental Protection Agency's (EPA) Food Recovery Hierarchy.
- Analyze risks to brand and discuss how food safety and logistics can help to lower these risks when donating perishable food products.
- Apply analytical tools, including cost analysis, to green retailing strategies.

MARKETING

- | | | |
|--|---|-----------|
| <ul style="list-style-type: none">• Marketing• <i>Market Research</i>• <i>Content Analysis</i>• <i>Voice of the Customer</i>• <i>Entrepreneurial Ventures</i> | <p>Validate or Pivot?</p> <p>Using Content Analysis to Assess Green Zebra's Customer Value Proposition: Case A</p> <p>Charla Mathwick,* Portland State University [615 SW Harrison St., Portland, OR 97201; mathwickc@pdx.edu]</p> | <p>73</p> |
|--|---|-----------|

CEO Lisa Sedlar was two weeks from the start of meetings with venture capital funders to raise \$10 million for a West Coast expansion of her urban, convenience-store startup – Green Zebra Grocery. However, Amazon had just announced plans for a 3,000-store national rollout of Amazon-Go, their high-tech, self-serve concept store, described as the future of c-store retailing. To preempt investor concerns, Sedlar needed evidence that either validated the Green Zebra 'healthy convenience' positioning or customer insights that would help her decide how to pivot her customer value proposition to create a differentiated market positioning relative to key c-store competitors.

Intended Courses and Levels

This case is primarily targeted to upper level undergraduate and graduate classes in market research. The case illustrates one of the first steps recommended in the market research process, gathering qualitative insight to capture the 'voice of the customer'. The strategic decision associated with the case can be addressed, at least preliminarily, based on the content analysis results.

Learning Objectives

After studying this case, students will be able to:

- Understand and apply the basics of exploratory research using content analysis. This research technique has two distinct applications: (1) it is the first step in the market research process, and (2) it is a relevant research technique that underlies the market validation process used by entrepreneurs for purposes of strategic decision-making.
- Apply customer insights to support strategic decision-making related to the formulation and/or revision of a firm's customer value proposition and competitive advantage.
- Apply exploratory research insights to formulate research objectives used to guide a follow-up primary study.

STRATEGIC MANAGEMENT

<ul style="list-style-type: none">• <i>Strategic Management</i>• <i>Environmental Sustainability</i>• <i>Shared Value</i>• <i>Waste Disposal</i>	Baldor Specialty Foods: The “SparCs” Challenge 93
	Michelle DeMoss* and Ram Subramanian, Stetson University [DeLand, Florida 32723, mdemoss@stetson.edu]
	Baldor Specialty Foods, a family owned, New York City-based food intermediary, served business customers in the country's north east corridor. A key activity that Baldor performed was sourcing and preparing various vegetables for use by its customers. An outgrowth of this program was the approximately 150,000 pounds per week of produce scraps generated that was unfit for sale. Thomas McQuillan, Baldor's Vice President of Corporate Strategy, Culture, and Sustainability was charged with the disposal of these scraps in an environmentally friendly way that would also help the company's bottom line. Notwithstanding McQuillan's efforts, in 2018, waste disposal continued to be a significant cost for the company. At an upcoming offsite company retreat, McQuillan had to present a plan to address Baldor's food waste disposal that would help the company both financially and, in its sustainability standing.

Intended Courses & Levels

The case deals with food waste, a key issue in sustainability. The case would suit a senior level undergraduate or a graduate course in strategic management. In such a course, the case is best taught toward the middle of the semester after students have had exposure to the basic concepts of business-level strategy formulation.

Learning Objectives

After reading and analyzing the case, students should be able to:

- Understand what sustainability is and how sustainability challenges interface with the organization's strategy (Q1, Q2).
- Examine and articulate the business case for sustainability-based strategic decisions (Q3, Q4).

- Analyze the business and non-business factors that are relevant to sustainability initiatives (Q5).



NACRA

North American Case Research Association

NACRA is a collaborative organization of approximately 500 researchers, case writers and teachers, mostly in the business disciplines, who support each other's research and writing efforts.

