ABSTRACTS ONLY

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OUTSTANDING TEACHING CASES GROUNDED IN RESEARCH

GINA GRANDY, EDITOR

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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/)
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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 4 of the *Case Research Journal*. In this issue you will find five cases. Of those cases, there are two in Entrepreneurship, and one each in Finance, Information Systems and Social Responsibility.

The two Entrepreneurship cases published in this issue both depict growth decisions of franchisee businesses, specifically whether or not to open additional stores to add to two existing stores or to open a new franchise operation. "Cash in or Stay: A Franchisee's Dilemma" by Mayank Jaiswal and Lisa Teach looks at a decision faced by co-entrepreneurs of a franchisee in the casual dining industry segment. It is a disguised case in that the name of the franchise and owners are disguised but the decision they face is real. The co-entrepreneurs needed to decide whether they sell the two existing stores and focus on other life plans or grow their existing businesses including opening new stores. The second Entrepreneurship case, "Sola Salon Studios: Innovation and Risk in the Sharing Economy," by Ryan Atkins and Peter Gianiodis features an innovative business model in the stylist / hair salon industry. Sola Salon Studios refers to the stylists who work in them as 'Solapreneurs' and the business model is one grounded in the sharing economy. The two prospective entrepreneurs must weigh a number of legal risks as they decided whether or not to open the franchise in Pennsylvania.

The Finance case published in 39(4) is one on a non-profit organization in the arts and musical festival arena. "The Beiteddine Festival: Bridging the Gap" is authored by Lina Tannir. Beiteddine Festival is located in Lebanon and the Board of Directors faced a financial dilemma that threatened the survival of the organization. "Sunrise Construction: Time Tracking System Crisis" by Jane Gravill, Derek Lenos and Robert McKenna also has a crisis situation focus but in the area of Information Systems. The Vice President of Operations needed a fix to address ongoing issues with the organization's time tracking system. He needed to determine the key system requirements and evaluate the various options before presenting his recommendations to the President.

The final case in this issue is one with a Social Responsibility focus and looks at the decision faced by a founder and CEO regarding changing the legal structure of his for-profit post-secondary education company, Laureate Education. "Laureate Education Inc. & the B Corp Certification: Always Meant to B?", by Maria Ballesteros-Sola and Elizabeth Ontaneda details the decision by Doug Becker to determine the long term value of pursuing the B Corp Certification for the organization and changing the legal status to become a Public Benefit Corporation. Stakeholder analysis is key to the decision he had to make and assessing whether or not this decision aligns with the organization's mission.

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

ENTREPRENEURSHIP

- *Entrepreneurship*
- *Franchising*
- *Business Valuation*

Cash in or Stay: A Franchisee's Dilemma 1

Mayank Jaiswal,* Rider University and Lisa Teach [2083 Lawrenceville Road, Lawrenceville, New Jersey 08648-3099, mjaiswal@rider.edu]

The context of the case is a franchise in the casual dining industry segment (a hybrid between fast food and fine dining). A couple owned two franchisee stores of the Trio Burger chain. The case covers their story, how they ultimately decided to acquire their own Trio Burger franchise, the pains they faced in opening their first store, and finally, challenges for opening their second store. The case then transitions to the decision they face – to sell the two stores they had developed to an interested party or to continue operating them and open more stores down the road.

Intended Courses and Levels

This case is designed to target undergraduate students of entrepreneurship, although it is also suitable for courses related to Retail or Channels, as franchising is big in retail as well. It could be taught in the first half of the course after discussion of various options of starting a business, such as a startup from scratch, franchising, or buying an existing business.

Learning Objectives

Students will:

- Compare the benefits and challenges of owning a franchise vs. starting a business from scratch.
- Discuss how to conduct due diligence when buying a franchise.
- Assess the nature of challenges faced by franchisees when opening their first vs. subsequent stores.
- Evaluate the current and future value of a franchise business qualitatively and quantitatively.
- Evaluate options and recommend a decision between available alternatives of selling or growing a franchise.

- *Entrepreneurship*
- *Strategic Management*
- *Sharing Economy*
- *Beauty Salons*

Sola Salon Studios: Innovation and Risk in the Sharing Economy 13

Ryan Atkins,* Duquesne University, Peter Gianiodis, Duquesne University and Thomas Tworoger, Nova Southeastern University [600 Forbes Ave, Pittsburgh, PA 15282, atkinsr@duq.edu]

The case examines two entrepreneurs who were considering opening a Sola Salon Studios franchise in Pennsylvania, despite a challenging regulatory environment. Sola is an innovative salon business model in which stylists (aka Solapreneurs) license fully equipped salon studios to run their own businesses. Sola's business model epitomizes the entrepreneurial opportunities available in the sharing economy, resulting in its rapid expansion across the United States. Despite this opportunity, Sola and its franchisees faced significant legal risks, similar to those encountered by other pioneers in the sharing economy, because the laws in the state of Pennsylvania, as currently written, could be interpreted as preventing the Sola business model from operating. The case prompts discussion of various business concepts including: the sharing economy, the inherent risks and likely tradeoffs of entering an uncertain market, and behavioral aspects of decision making.

Intended Courses and Levels

This case is appropriate for undergraduate or graduate courses on entrepreneurship and strategy.

Learning Objectives

- Identify and assess the type of sharing economy business model adopted by a franchise based business.
- Critically evaluate entrepreneurial propensity for risk in decision making, including bias and heuristics in decision making.
- Evaluate and identify a course of action in the face of uncertain information.

FINANCE

- *Finance*
- *Non-Profit Management*
- *Financial Management*
- *Management Accounting*
- *Budgeting and Planning*
- *Management of Crisis*
- *Financial Crisis*

The Beiteddine Festival: Bridging the Gap

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Lina Tannir,* American University of Beirut [Beirut, Bliss Street, 11-0236, lt01@aub.edu.lb]

As a non-profit organization that used art and musical activity to bridge the divide in Lebanon, a country torn by war and political conflicts, the Beiteddine Festival was facing an unprecedented financial crisis. Lebanon, was on the verge of bankruptcy; funds, grants, and bank loans used to finance operations were drying up, expenses were escalating, and additional taxes were being levied by a government struggling to survive. The board of the festival had to decide whether it could sign contracts with artists for the upcoming season and beyond, and if so, had to create a process to ensure sound financial planning. A clear focus needed to be maintained on preserving the quality of performances while maintaining the impact the festival had on the social, humanitarian, and economic levels.

Intended Courses and Levels

The case is suitable for courses taught at the undergraduate level in NPO management courses or management accounting as it relates to a NPO.
The purpose of the case is to introduce students to financial management of NPOs, and more specifically, financial management of NPOs in difficulty. It can be used to illustrate specific topics such as financial planning and sustainability, cost and revenue allocation, budgeting, and other related topics.

Learning Objectives

- Understand the financial model of NPOs.
- Perform financial analysis needed to assess the viability of the operations of NPOs.
- Develop a budget framework for NPOs.
- Analyze results and recommend a decision about the financial sustainability of a NPO in trouble.

- *Information Systems*
- *Information Technology*
- *Project Management*
- *Business Process Re-engineering*

Sunrise Construction: Time Tracking System Crisis

Jane Gravill,* Derek Lenos and Robert McKenna, Conestoga ITAL [299 Doon Valley Drive, Kitchener, N2G 4M4, jgravill@conestogac.on.ca]

Sunrise Construction Ltd. (Sunrise) had a critical problem with the firm's Time Tracking System (TTS) business processes. The management team deemed the TTS fix a top priority for the firm since the failing system was crippling the firm's operations. Ben Smith, Vice President, Operations for Sunrise was given the responsibility of presenting a solution at the next monthly management meeting to fix the TTS problem. Problems with the TTS escalated leading to substantial indirect costs such as ill-informed decisions regarding resource availability, project costs and payments which negatively impacted the firm's operations, reputation and increased the risk of regulatory litigation. As a result, the sustainability of future business operations relying upon the TTS was brought into question. Furthermore, data integrity issues, redundant processes and bottlenecks with the current TTS were estimated to directly cost the firm $21,000 annually. Smith hired an Information Systems consultant to help him navigate the faulty processes of the TTS, determine key system requirements and evaluate potential off-the-shelf, custom and process re-engineering solutions. They had to work quickly to determine a solution as the next management meeting was fast approaching and the firm was struggling.

Intended Courses and Levels

This case is suitable for the undergraduate student and can be used in undergraduate introductory Information Systems Management or Business Process Re-engineering courses. Positioning this case in the second half of the introductory Information Systems course after the students have had the opportunity to understand the role of Information Systems and business processes within firms is recommended. This will allow students to be in a position to be able to identify information needs within a firm and evaluate the advantages and disadvantages of potential solutions for the TTS. Instructors can scaffold the learning in this area by having students initially identify information needs by apply the TELOS Feasibility Needs Analysis Framework and then apply the Weighted Scoring Model Approach to evaluate the pros and cons of alternatives later in the course when more complex factors or familiarity with various types of systems has been addressed.

Learning Objectives

- Identify key issues confronting an organization facing a time tracking system (TTS) crisis.
- Apply the Information Feasibility Needs Analysis framework to analyze a TTS crisis.
- Apply the Weighted Scoring Model Approach to determine success criteria and evaluate alternative solutions to solve a TTS crisis.
- Interpret analytical results and develop a final recommendation and implementation plan to solve a TTS problem.

- ***Social Responsibility***
- *Strategy*
- *Social Enterprise*
- *B-Corporations*
- *Benefit Corporations*
- *Sustainable Business*
- *Stakeholders*
- *Social Responsibility*

Laureate Education, Inc. & the B Corp Certification: Always Meant to "B"? **61**

Maria Ballesteros-Sola*, California State University Channel Islands and Elizabeth Ontaneda, Universidad Peruana de Ciencias Aplicadas [CSUCI, One University Drive, Camarillo, CA 93012-8599, maria.ballesteros-sola@csuci.edu]

In 2014 Laureate Education, Inc. was the largest for-profit post-secondary education company in the world, with almost one million students enrolled in more than 50 institutions across 20+ countries. During that year, this multinational corporation was considering modifying its legal status to become a Public Benefit Corporation (PBC) in Delaware (U.S.) and completing the certification process to become a B Corp. They had also decided to file an initial public offering (IPO) in 2015, so Laureate could potentially become the largest PBC and the first one to go public in the world. The case presents Laureate's founder and CEO, Doug Becker, in late 2014, evaluating the long-term value of the B Corp certification. To evaluate the decision, students must understand what the B Corp certification and PBC legal status are and assess if they are helping the organization to fulfill its mission and to manage stakeholders' interests within the context of soon to be a publicly traded company. To do so, the case describes Becker's entrepreneurial background, Laureate's history, and critical developments up to 2014. The case highlights key points in the evolution of the for-profit higher education industry from the late nineties through 2014, as well as an introduction to the B Corp certification and its B Impact Assessment (BIA).

Intended Courses & Levels

The case is a good fit for lower-division undergraduate courses that focus on social business, sustainable business, corporate social responsibility, and ethics.
We understand that this could be a new topic for the students. To maximize students' learning, we recommend that the case is located within the course after an introduction to the B Corp certification, either in a previous session before the case or through the suggested pre-work in the Teaching Plan or readings included in the Theoretical Linkages & Concepts section.

Learning Objectives

Students that successfully prepare and discuss the case should be able to:

- Critically assess the purpose of a for-profit organization as it relates to its stakeholder obligations;
- Identify and assess stakeholders' interests and power in organizational decision making;
- Evaluate the alignment between B Corp certification and an organization's mission and organizational objectives; and,

- Integrate B Corp Impact Assessment, stakeholder analysis framework and mission alignment.

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.

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