

ABSTRACTS ONLY

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**OUTSTANDING TEACHING CASES
GROUNDED IN RESEARCH**

GINA GRANDY, EDITOR

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RESEARCH ASSOCIATION**

Editor

**Gina Grandy
University of Regina**

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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. This should also include a section on how best to teach the case online / remotely.
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.
10. **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

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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 41 Issue 2 of the *Case Research Journal*. In this issue of *Case Research Journal* you will find six cases. The primary subject areas for those six cases include: two in Human Resource Management, and one each in Entrepreneurship, Finance, Social Responsibility and Strategic Management. Two of those cases have a strong social responsibility emphasis – see “Nestlé Waters North America: Accessing Water from the Floridan Aquifer” and “Boeing and the 737 MAX Crisis.”

In the area of Human Resource Management, the case by Karen Boroff and Austen Boroff, “Policy Violations on Gender Transition?”, deals with an incredibly timely and important topic, gender transition and possible policy violations in a university setting. In 2019 John Schuler, an administrator at Smith and Keats Christian University, is the co-investigator of a complaint filed by a student undergoing a gender transition. Schuler must determine if there are organizational policy violations, based upon claims made by the student and statements by others involved. The issues raised in the case and the decision to be made are transferable to many organizational setting beyond a university. The other case in the area of Human Resource Management, “YellowStarr Financial: Refocusing on Employee Engagement,” by Danielle J. Clark and Terry McGovern, detailed a decision by Lisa Murphy, Human Resources Director. The company had gone through a software platform migration with FinanceConnect, its proprietary customer data web-based software that presented retirement plans, investment options and pricing in a simple, easy-to-navigate way. As of 2018 with the migration project almost complete, YellowStarr faced high employee turnover rates. Murphy needed to decide what steps to take both short-term and long-term to improve upon YellowStarr’s employee engagement.

There are also two cases with a finance focus in this issue, one targeted for courses in Entrepreneurship and one in Finance. “Sizeable: Crowdfunding Campaign!...Again” by Nancy Huyghebaert and Olga Kandinskaia details the decisions faced by a newly appointed woman CEO of the start-up company Sizable in late 2017. CEO Marie Martens needed to secure additional financing through a crowdfunding campaign. Martens faced several decisions: assessing how the market might react to the change in the management team, with the firm now led by a female CEO; whether to use a different crowdfunding platform or rely on one of the platforms used in the past; would she be able to deal with investors’ typical concerns about break-even and dilution; and finally, what share price would be most appropriate. She had only until the end of the month to make her decisions. The second case targeted for a finance course is written by Susan White and Karen Hallows. In “To Continue the ESOP or Not – That is the Question” Jolanda Janczewski, co-founder of Consolidated Safety Systems (CSS), was contemplating whether or not she should reverse the employee stock ownership plan (ESOP), which was set up in 2012. To make the decision in 2020, Janczewski needed to assess CSS’s value and consider a variety of qualitative factors.

The final two cases in this issue both address social responsibility considerations, one with a primary focus on Social Responsibility and the other in Strategic Management. The case by Michelle DeMoss, Ram Subramanian, James Beasley, and John Tichenor entitled “Nestlé Waters North America: Accessing Water from the Floridan Aquifer” is on a non profit organization, Our Santa Fe River Inc.. The organization’s mandate was to protect the waters and lands supporting the aquifer, springs and rivers that drain into the Saint Fe River in northern Florida. Michael Roth, President of Our Santa Fe River Inc., faced a decision of how best to lead the organization in protecting the Santa Fe River watershed given Seven Springs Water Company and Nestlé Waters North America’s intent to withdraw 1.152 million gallons of spring water per day for NWN’s bottled water business. Seven Springs and Nestlé had filed an appeal to the Division of Administrative Hearings preempting a proposed denial of the water permit use. Roth and the

Board felt they had a responsibility to play a role in seeing the denial of the water use permit and in March of 2020 they had only 60 days to prepare their response in anticipation of the appeal outcome.

“Boeing and the 737 Max Crisis” by Randall D. Harris, Vanessa Hill, and Anne T. Lawrence is intended for Strategic Management courses and discussions on crisis management. In 2020 The Boeing Company Inc.’s newly appointed President and CEO, David Calhoun, faced several urgent decisions. Calhoun needed to investigate and evaluate Boeing’s actions preceding and following two separate Boeing 737 MAX plane crashes which resulted in the deaths of 346 people. He had to identify a strategy that restored the company’s reputation, repaired relations with its stakeholders, and returned the 737 MAX to worldwide service.

As always, I would like to thank the tireless efforts of our reviewers and the editorial team. This has been a busy year for our reviewers with two special issues underway – we couldn’t do this without you! Please look over the table of contents of this issue and consider using one or more of these cases in your courses. Consider sharing the table of contents from this issue with your colleagues as well 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 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. 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* **Sizable: Crowdfunding Campaign! ...Again** 1
 - *Entrepreneurial Finance*
 - *Equity Crowdfunding*
 - *Gender Bias in Start-Up Finance*
 - *Hybrid Valuation: DCF & Multiples*
 - *Break-Even Analysis*
- Olga Kandinskaia,* CIIM – Cyprus International Institute of Management, and Nancy Huyghebaert, KU Leuven [21 Akademias Avenue, Aglandjia, 2107, Nicosia, Cyprus, olga@ciim.ac.cy].
- The Sizable Case presents a decision situation. The case setting is Brussels, early November 2017. Marie Martens was at that time the newly appointed CEO of the start-up company Sizable, which was a specialist in men's underwear made from eco-friendly bamboo, eucalyptus, and organic cotton. Since March 2015, multiple investors had put their money at stake, either directly as private investors in the company or via the company's three crowdfunding campaigns. In November 2017, Sizable needed 100,000 euros of additional financing. Together with the other members of the management team, Martens had prepared a business plan and proposed prompt action to secure extra funding over the month of November. While the decision to move forward with a new crowdfunding campaign was made, Martens worried about the risks of a fourth round of crowdfunding. Failing would not only mean a lack of funds, but also a stained reputation. Martens had several concerns: first, how would the market react to the change in the management team, with the firm now led by a female CEO; second, whether to use a different crowdfunding platform or rely on one of the platforms used in the past; third, would she be able to deal with investors' typical concerns about break-even and dilution; and finally, what share price would be most appropriate. She had to decide very quickly on these issues since the new crowdfunding round was set to begin before the end of the month.

Intended Courses and Levels

This case is intended for advanced undergraduate or graduate courses in entrepreneurship or finance. It aims to expose students to a wide range of issues related to financing and business valuation covered in such courses as Entrepreneurial Finance, Financing New Ventures, and Company Valuation. Students need to have been exposed to firm valuation prior to tackling this case. It is also recommended that students unfamiliar with crowdfunding be assigned readings as noted later in the IM.

Learning Objectives

In completing this case, students should be able to:

- Evaluate crowdfunding as a viable equity source for growing entrepreneurial firms;
- Delineate the essence of gender bias in start-up financing and the potential impact on a crowdsourcing initiative;

- Perform a SWOT analysis and critique the company's business plan;
- Perform a valuation of the company's shares using a combination of the DCF and multiples valuation method for an entrepreneurial firm engaged in a crowdfunding initiative; determine the cost of capital for a small start-up company by applying a build-up type method, like the modified CAPM model; and
- Assess a firm's break-even point as part of a crowdfunding campaign.

FINANCE

- *Finance*
- *Valuation*
- *Financing*
- *Financial Statement Analysis*
- *Employee Stock Ownership Plan*

To Continue the ESOP or Not – That Is the Question

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Susan White* and Karen Hallows, University of Maryland] Van Munching Hall, R.H. Smith School of Business, University of Maryland, College Park , Maryland 20742, suwhite@umd.edu].

Consolidated Safety Systems (CSS) was a government contractor that consulted in a variety of areas, serving government and private sector institutions. Co-founders Jolanda Janczewski and Dennis Lauchner turned the firm into one employee owned through an Employee Stock Ownership Plan (ESOP), which had scheduled payouts to the two owners. At the time of the case, Lauchner had largely exited the business. has received his payout and had a minimal interest in the business. Janczewski recognized that the ESOP had created some issues, including servicing the debt associated with the buyout, creating inequities among legacy employees and new hires, which led her to consider whether the ESOP should continue. Janczewski had become increasingly concerned about the expense of the ESOP, which was only expected to increase more in the future. This might be the time to reverse the ESOP. Janczewski needed to know CSS's value in order to make a fully informed decision. The decision to ESOP or not was complex, with strong pros and cons on both sides of the question.

Intended Courses and Levels

This case is appropriate for an undergraduate or graduate finance intermediate or advance corporate finance elective. ESOPS are generally not covered in introductory finance courses, and students should have taken basic finance principles before analyzing this ESOP. This case has been used in an advanced undergraduate case course, taken primarily by seniors who have already taken most of the finance curriculum and therefore have strong backgrounds in finance. It would also be appropriate for an entrepreneurship class where exit strategies are discussed.

Learning Objectives

In completing this case, students should be able to:

- Demonstrate an understanding of ESOPs by explaining the advantages and disadvantages of creating an ESOP;
- Assess a firm's valuation using comparable multiples and discounted cash flow analyses;

- Perform a financial statement and ratio analysis in evaluating firm financial strength and ability to take on and service debt; and,
- Using both qualitative and quantitative arguments, determine the most appropriate choice to continue or not an ESOP.

HUMAN RESOURCE MANAGEMENT

- | | | |
|--|--|-----------|
| <ul style="list-style-type: none"> • <i>Human Resource Management</i> • <i>Gender Transition</i> • <i>Diversity and Inclusion</i> • <i>Personnel Policies</i> | <p>Policy Violations on Gender Transition?</p> <p>Dr. Karen Boroff*, Seton Hall University and Captain Austen Boroff, United States Army [400 South Orange Ave; South Orange, NJ 07079-2692, (973) 761-9597, Karen.Boroff@shu.edu].</p> | <p>47</p> |
|--|--|-----------|

John Schuler, an administrator at Smith and Keats Christian University (SKCU), is the co-investigator of a complaint involving potential policy violations filed by a graduate student undergoing a gender transition. Schuler must determine if there are organizational policy violations, based upon claims made by the student and statements made by others interviewed. This may involve drawing factual conclusions and making credibility judgments. Schuler also has to recommend whether policy changes are necessary, as a result of his investigation.

Intended Courses and Levels

This case can be used in coursework on topics of diversity / inclusion in an upper-level human resource management course. An upper-level human resource management course typically also centers on human resource policies and how the HR manager of today has to be at the forefront of policy development to ensure employee behaviors are congruent with organizational goals. Students in courses on human resource regulation will also find this case relevant. Upper-level courses on diversity management may find this case provides an excellent learning platform. Faculty teaching courses in counseling, higher education leadership, psychology, social work, or sociology may find the case especially current.

Learning Objectives

At the conclusion of having studied this case, students will have:

- Investigated organizational policies relating to persons at work and have applied policies to a fact pattern centering on a person transitioning from one gender to the next;
- Reviewed and critically examined how an organization's policies may be violated by the behavior of others; and,
- Developed recommendations on policy improvements, based upon conclusions drawn on policy violations.

HUMAN RESOURCE MANAGEMENT

- ***Human Resource Management*** **YellowStarr Financial: Refocusing on Employee Engagement** 57
- *Employee Engagement*
- *Organizational Behavior*
- *Change Management*

This case offers students an opportunity to observe employee engagement through key events that took place at YellowStarr Financial Services before and during a software platform migration. Steve Keldan, who served as CEO of YellowStarr, founded the company in 2002. Lisa Murphy was hired as the Human Resources Director for YellowStarr in 2011. In her first few years, Murphy was challenged with building a human resource team that could manage more than 100 new employees for the growing company. In 2015, YellowStarr needed to undergo a software platform migration with FinanceConnect, its proprietary customer data web-based software that presented retirement plans, investment options and pricing in a simple, easy-to-navigate way. As Human Resources Director, Murphy was tasked with the duty of supporting the migration from an employee standpoint, which meant hiring new talent, minimizing employee turnover, and promoting a healthy, positive culture that encouraged employee engagement. Before and during the migration, Murphy made decisions that appeared to both help and hurt engagement. Implementations included fewer training initiatives, relaxed dress code, and employee-led activity committees. As of 2018 with the migration project almost complete, YellowStarr faced high employee turnover rates. No longer having to deal with the firefighting associated with the migration, Murphy needs to decide what steps to take both short-term and long-term to improve upon YellowStarr's employee engagement so the company is an employer of choice for new and existing employees.

Intended Courses and Levels

This field-researched case is prepared for use in an undergraduate course on Human Resources or Organizational Behavior. If teaching this class in an intro course, instructors will find it useful to position this case late in the course after the basic principles and techniques of human resource management are covered. This case may also work well after the student has read a chapter on employee engagement or organizational change to reinforce understanding of these concepts.

Learning Objectives

In completing this case, students should be able to:

- Identify and assess the drivers of high and low employment engagement;
- Evaluate the connection between low employee engagement and employee attrition; and,
- Identify and recommend tactics to increase employment engagement and retention for a firm which has experienced a decline in employment engagement.

SOCIAL RESPONSIBILITY

<ul style="list-style-type: none">• <i>Social Responsibility</i>• <i>Non Profit Management</i>• <i>Ethics</i>• <i>Business and Society</i>• <i>Sustainable Development</i>• <i>Stakeholder Management</i>• <i>Nonmarket Issue</i>	<p>Nestlé Waters North America: Accessing Water from the Floridan Aquifer</p> <p>Michelle DeMoss,* Ram Subramanian, James Beasley, and John Tichenor, Stetson University [421 N. Woodland Blvd., Unit 8398, DeLand, FL 32723, mdemoss@stetson.edu].</p> <p>Our Santa Fe River, Inc, is a nonprofit organization committed to protecting the waters and lands supporting the aquifer, springs, and rivers that drain into the Santa Fe River in northern Florida. Michael Roth, president of Santa Fe River, is faced with the decision of how best to lead this organization in protecting the Santa Fe River watershed from Seven Springs Water Company (Seven Springs) and Nestle Waters North America's (NWNA) intent to withdraw 1.152 million gallons of spring water per day for NWNA's bottled water business. Seven Springs Water and NWNA had filed an appeal to the Division of Administrative Hearings (DOAH) preempting the Suwannee River Water Management District's (SRWMD) proposed denial of the renewal of the water use permit to source water from the springs at Devil's Eye Complex, which was part of the watershed for the Santa Fe River. Roth and Our Santa Fe River (OSFR) board needed to decide on the optimal response to support efforts to finalize the denial of this water use permit. The administrative appeal process took approximately sixty days, so Roth and his team knew they had to act quickly once the DOAH's decision was rendered.</p>	65
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Intended Courses and Levels

The main focus of this case is water conservation and the balance between the ecosystem's, individual's, and corporation's right to access water, especially pure, fresh water. Therefore, the case raises ethical and sustainability questions that require a strategic analysis from the perspective of the decision maker. The case would work well in an undergraduate course in business and society, a senior-level undergraduate or first-year graduate course in sustainability management.

Learning Objectives

In completing this case, students should be able to:

- Understand what sustainable development is and how it applies to the management of the earth's water resources;
- Examine the stakeholders in a decision-making context and identify the expectations of each party;
- Identify the role of non-market factors that can impact a business; and,
- Analyze how NGOs can significantly impact a corporation's non-market strategic decisions.

STRATEGIC MANAGEMENT

• <i>Strategic management</i>	Boeing and the 737 MAX Crisis	81
• <i>Crisis Management</i>	Randall D. Harris,* Texas A&M University - Corpus Christi, Vanessa Hill,	
• <i>Leadership</i>	University of Louisiana, Lafayette, Anne T. Lawrence, San José State	
• <i>Business and Society</i>	University [6300 Ocean Drive, Unit 5808, Corpus Christi, TX. 78412-5808,	
• <i>Social Responsibility</i>	Randall.Harris@tamucc.edu].	

Monday, January 13, 2020, was David Calhoun's first day on the job as President and CEO of Boeing, Incorporated. Several urgent issues required his immediate attention. Prior to Calhoun's first day, two separate Boeing 737 MAX planes had crashed, killing 346 people. In the wake of the second crash, all 737 MAX planes worldwide had been grounded. Consequently, Boeing's financial condition was rapidly degrading. To make things worse, the company was in direct conflict with the Federal Aviation Administration (FAA), Congress was launching multiple investigations, and the company was embroiled in lawsuits brought by investors and crash victims. Calhoun will need to investigate and evaluate Boeing's actions preceding and following the two crashes to identify a strategy that restores the company's reputation, repairs relations with its stakeholders, and returns the 737 MAX to worldwide service.

Intended Courses and Levels

This case was designed for graduate and executive education level courses or modules in crisis management, a subfield of strategic management. Instructors of courses that discuss corporate governance, executive leadership and top management teams may also find this case useful, due to the complex nature of the issues raised by the case and the implications for the strategic management of organizations.

Learning Objectives

In completing this case, students should be able to:

- Define the key strategic issues, both internal and external;
- Evaluate the financial condition of the company;
- Analyze the company's handling of the crisis;
- Apply crisis communications and crisis management best practices and recommend corrective actions;
- Develop a crisis communications plan for the company;
- Develop a crisis management plan for the company; and,
- Design a strategic action plan for the company.



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