ABSTRACTS ONLY

VOLUME 43
ISSUE 1
WINTER 2023

CASE RESEARCH JOURNAL

OUTSTANDING TEACHING CASES GROUNDED IN RESEARCH

ERIC DOLANSKY, EDITOR

PUBLISHED BY THE
NORTH AMERICAN CASE
RESEARCH ASSOCIATION

IN PUBLICATION
SINCE 1980

Outstanding Teaching Cases Grounded in Research

Volume 43 • Issue 1 • Winter 2023

Case Research Journal

Published by the

North American Case Research Association

NACRA
NORTH AMERICAN CASE
RESEARCH ASSOCIATION

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 $85/year for North American subscriptions and US $115/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: 978-1-7377586-5-5

NACRA Officers 2022–2023

EXECUTIVE COMMITTEE AND BOARD OF DIRECTORS

President
Nicole M. Amos
Johnson & Wales University

Immediate Past President
John D. Varlaro
Johnson & Wales University

Vice-President Programs
Olga Kandinskaia
Cyprus International Institute of Management

Vice-President Programs-Elect
Melanie Reed
Thompson Rivers University

Vice-President Communications
Lisa Facey-Shaw
University of Technology, Jamaica

Vice President, Case Marketing
Terry McGovern
University of Wisconsin-Parkside

Vice President, Membership
Grishma Shah
Manhattan College

REPRESENTATIVES OF REGIONAL AND AFFILIATED ORGANIZATIONS

Canada (ASAC)
Meredith Woodwark
Wilfrid Laurier University

Mexico (ALAC)
Martha Elena Moreno Barbosa
Tecnologico de Moterrey Campus Puebla

Eastern U.S. (CASE)
William Naumes
University of New Hampshire (Retired)

Southeastern U.S. (SECRA)
Susan Peters
University of North Carolina

Southwestern U.S. (SWCRA)
Kendra Ingram
Southeastern Oklahoma State University

Society for Case Research (SCR)
Andy Borchers
Lipscomb University

Western U.S. (WCA)
Melanie Reed
Thompson Rivers University

Caribbean Case Researchers Association
Paul Golding
U Technology – Jamaica

International Case Research Association (ICRA)
William Wei
MacEwan University Business School

Directors at Large
Brooke Klassen
University of Saskatchewan
Erin Pleggenkuhle-Miles
University of Nebraska Omaha
Miriam Weisman
Florida International University

Advisory Council Chair
Janis Gogan
Bentley University

Advisory Council Vice Chair
Randall Harris
Texas AM University – Corpus Christi

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. 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:
Eric Dolansky, Editor
edolansky@brocku.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, Terry McGovern, mcgovert@uwp.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

An entrepreneur who has tetraplegia. A journalist deciding on a vote for FIFA awards. The young founder of a nonprofit that made school uniforms that grow. A transgender cryptologist in the US Navy. These are four of the six protagonists you will meet Volume 43, Issue 1 of Case Research Journal. There are six interesting, engaging, powerful stories in this issue, stories that will capture the attention of students and provide valuable learning opportunities. Though stories are a topic I could write about for days, in this issue's editorial I will instead focus only on story element: the protagonist.

I believe that in a business case, the protagonist is our entry into the world of that case's business decision. We learn and experience the situation through their eyes. Case Research Journal authors, with the help of reviewers and the editorial team, provide us with fascinating protagonists; decision-makers who are not just their title (e.g. marketing manager) but a real person, with real goals, needs, wants, and emotions. When discussing cases with other case researchers, new and experienced, I will often say that the case is not about the company, or the problems, but rather the decision and the decision-maker. This provides the student working on the case with two key pieces of information: what is to be done, and who it is to be done for. Students are tasked with developing plans for protagonists.

Therefore, writing a case where the protagonist comes to life for the reader, is a consistent presence in the case, and is presented as someone that it is worthwhile helping, are all of the utmost importance. As authors, we can sometimes fall prey to common writing traps. We forget about our protagonists for pages and pages, while we describe company history or industry information. We do not create a real person with whom students can identify, either because we insufficiently present their perspective (for example, a case lacking in quotes) or somehow believe that emotions or non-business-focused information is taboo in a business case.

In doing so, we miss opportunities to add value for students. In order for students to obtain value from case learning, they must read (of course), engage (yes), and put effort into their case courses. Having a clearly-drawn protagonist who comes across as someone worth spending time with, someone whose shoes we can step into, and someone who is not a cardboard cut-out of a person, but rather a real business decision-maker, helps students want to participate and contribute.

The protagonists in this issue include:

- Sara Ferrer, founder of Zoey Koko, a company that sells bath and body products to girls aged five to twelve, in "Zoey Koko: Choosing an Alternative Path Forward," by Mark P. Rice. Looking at the growth stage from survival to success during a turbulent time, this case presents a comprehensive analysis of the venture.
- Payton McGriff, founder of a not-for-profit enterprise serving women and girls in Togo, in "S H E: Style Her Empowered," by Michael McCollough. This case takes a very clear decision between two options for future growth and ties it to mission and purpose.
- Edgar Cantero, a sports journalist who has just been chosen as a voter for FIFA's "The Best" awards, in "'The Best' FIFA Football Awards 2019: Who is the Best Men's Coach in the World?" by Juan M. Parra, Sylvia Rohlfer, and Pablo Alamo. This case is very much about decision-making itself, making it ideal for use early in a program.
- Pau Bach, the CEO of a company focused on improving the lives of those with disabilities, through the development and sale of handbikes, in "Batec Mobility: Creating, Scaling, and Selling an Inclusive Business," by Alfred Vernis, Suzanne Jenkins, and Lisa Hehenberger. In the case, Bach is

deciding between three options for selling his business, each with different implications for him and other stakeholders.

- Dax Holding, managing director of a mill that used antique weaving looms, in "Mungo Mill South Africa: Leading a Sustainability Strategy During Covid-19," by Caren Brenda Scheepers, Maxine Jaffitt, and Candace Dick. Holding must balance company values, sustainability, and history with the need for growth.
- Landon Wilson, a transgender US Navy sailor who is facing an uncertain reaction from his superior officers, in "Pink White and Blue: A Transgender Sailor, the U.S. Navy and a Right vs. Right Ethical Dilemma," by Terry Borja, Kathryn Aten, and Gail Thomas. Diving deep into ethics and decision-making, this case presents a unique situation and is presented in a challenging and thought-provoking manner.

I encourage you to read all of these cases and consider them for use in your classes. If you have colleagues for whom you believe these cases would be a good fit, make sure to suggest them. And if you have a case centered on an interesting decision-maker, submit it to our journal so that we may continue to provide faculty and students with excellent learning materials. I would be happy to receive your thoughts on the cases in this issue; as always, you can contact me at edolansky@brocku.ca

Sincerely
Eric Dolansky, Editor
Case Research Journal

Congratulations to the Curtis E. Tate Jr. Award Winners
(Best Cases Published in 2021 Volume 41 of the Case Research Journal)

<u>Curtis E. Tate Award Winner for Volume 41</u>

Sizable: Crowdfunding Campaign! . . . Again

by

Nancy Huyghebaert

KU Leuven

Olga Kandinskaia

Cyprus International Institute of Management

<u>Curtis E. Tate Award Runners-Up</u>

Addressing Homelessness in Kelowna – Determining How a New Agency Will Govern

by

Kyleen Myrah, Kerry Rempel and Dean Warner

Okanagan College

Magformers LLC and Amazon: Dealing with Counterfeit Magnetic Toys

by

Leslie E. Palich, Patsy M. Norman and Marlene M. Reed

Baylor University

Nestlé Waters North America: Accessing Water from the Floridan Aquifer

by

Michelle DeMoss, Ram Subramanian, James Beasley and John Tichenor

Stetson University

Abstracts Only

ETHICS

- ***Ethics***
- *Diversity, Equity, Inclusion (DEI)*
- *Gender Issues*
- *Transgender Employees*
- *Communication*
- *Government*
- *Military*

Pink, White, and Blue: A Transgender Sailor, the U.S. Navy, and a Right vs. Right Ethical Dilemm 1

Kathryn Aten,* Terry Borja, and Gail Thomas, Naval Postgraduate School, [555 Dyer Road, Monterey, CA 93943-5103, kjaten@nps.edu]

Landon Wilson, a transgender male, was a U.S. Navy sailor on a special assignment with the Army in Afghanistan. He worked as a cryptologic technician–collection specialist (CTR) collecting and analyzing top-secret data and creating special intelligence. Wilson enlisted as a female and began transitioning from female to male less than a year later at his Navy home-base. When a special Army assignment in Afghanistan provided the opportunity, Wilson presented male. When he arrived in Afghanistan, his teammates and Army leaders accepted him as male. He was in male barracks, and his leaders and colleagues referred to him with male pronouns. At the time, Department of Defense (DoD) policy prohibited transgender people from entering the Navy, and a sailor could be discharged at the discretion of a commander for physical or mental conditions, including gender and identity disorders. However, thousands of transgender individuals successfully served in the military during the ban. Wilson was performing well in the critical assignment in Afghanistan. But then Wilson's mentor revealed Wilson's secret to his Navy home-base leader in the U.S. The Navy home-base leader called Wilson and urged him to "come out" to his leaders in Afghanistan. Wilson had to decide if he should follow his Navy home-base leader's advice or keep quiet and hope for the best.

Intended Courses and Levels

Pink, White and Blue is appropriate for undergraduate or graduate courses in management, business ethics, organizational behavior, leadership, or human resources management. The case can be scheduled at the beginning middle, or end of courses. It is best scheduled after students have had some time to become familiar with each other and the instructor.

Instructors may vary the focus of the discussion depending on the course, placing a greater emphasis on policy and ethics for business ethics courses, on inclusive communication for leadership courses, and on diversity, equity, and inclusion management for organizational behavior and human resources management courses. Instructors who want to emphasize either organizational policy or inclusive communication may choose to skip LO5/DQ5 and instead engage in a longer discussion of the epilogue and the effects of recent policy flips on individuals and organizations (policy and ethics), or use one of the optional videos that explore transgender people's experiences (inclusive communication).

The case narrative focuses on transgender worker participation and provides an introduction to those who otherwise have no experience in this arena. However, the analysis and discussion apply to ethical dilemmas and diversity, equity, and inclusion (DEI) management generally. Although the highly regulated and formal

context of the case is different from other workplaces, and the consequences and recourse available would also be different, the case helps students identify and then work through ethical dilemmas.
The case allows students to analyze a 'right versus right' ethical dilemma, introduces challenges that transgender people might experience in organizations, and allows discussion of ethical and other justifications for DEI management. With the epilogue and update, the case provides an opportunity to discuss broader organizational issues regarding whether and how organizations should expand DEI programs. Finally, the case encourages students to critically examine their personal beliefs, attitudes, and biases about historically marginalized people.

Learning Objectives

After studying this case, students will be able to:

- Identify the characteristics of an ethical dilemma and distinguish an ethical issue from other types of issues that arise in organizations.
- Describe and differentiate between four types of right versus right ethical dilemmas.
- Assess options for responding to a right versus right ethical dilemma and describe three approaches.
- Explain the interplay among organizational policies, individual behavior, and diversity, inclusion, and equity in organizations.
- Articulate ethical justifications for DEI, discuss benefits and challenges of instituting DEI programs, and suggest steps individuals and organizations can take to encourage DEI in organizations.

DECISION MAKING

- *Decision Making*
- *Organizational Behavior*
- *Cognitive Bias*
- *Behavioral Science*
- *Psychology*
- *Motivating People*
- *Leadership and Managing People*
- *Soccer*
- *Football*

"The Best" FIFA Football Awards 2019: Who is the Best Men's Coach in the World? 17

Juan M. Parra,* INALDE Business School, Sylvia Rohlfer, CUNEF Universidad, and Pablo Alamo, CETYS Universidad [Campus U. Sabana, Autopista Norte, Km. 7, Costado Occ, Chía, Colombia, 140013, juanm.parra@inalde.edu.co].

Paraguayan sports journalist Edgar Cantero, correspondent for various international media outlets specializing in football (soccer in the US), was invited as a voter on 'The Best' award, granted annually by the Fédération Internationale de Football Association (FIFA) in various representative categories (best coaches, players, etc.). The voting system was designed to ensure votes were as impartial and transparent as possible, with votes later being made public on the FIFA website. He only had a couple of weeks to cast his vote, although he did favor four of the top ten candidates, in particular: Jürgen Klopp (Liverpool FC coach), Pep Guardiola (Manchester City), Mauricio Pochettino (Tottenham Hotspur) and Erik ten Hag (AFC Ajax). Cantero wondered if he should consider criteria that went beyond the "cold" data of the results achieved. Some of his colleagues also considered the message that could be sent, both to fans and football professionals, when it came to deciding what made someone "the best".

Intended Courses and Levels

Because this case was initially developed as an introductory case on decision-making, it is particularly useful in programs where an introduction to the case method is needed. Therefore, it has been very useful not only for MBA and middle-management programs but also for undergraduates and executive education participants. Since the topic is not specifically related to a business decision, there is not much difference in the level of discussion between groups, because participants usually give their opinion as "sports fans."
The case can also be used as an introductory case in courses related to organizational behavior and human resources, principles of management, and managerial decision-making. It can be used to analyze how rational vs. intuitive processes used to reach a business decision (e.g., hiring, promotion, investment, business collaboration, etc.) are closely related to the nature of the decision, the profile of the decision-maker, and the established decision-making process or system. Therefore, we emphasize 1) the rational process of decision-making and the role of intuition; and 2) the importance of defining clearly who the decision-maker really is, in order to define the level of commitment and accountability, and the biases that can be present when making a decision.

Learning Objectives

Once having studied this case, students will be able to:

- Understand the importance of correctly defining who the decision-maker really is and how their profile, expertise, and motives may bias or have an impact on how they define the problem (according to their perspective) and what criteria are used to make a decision.
- Analyse how the type of decision and decision-making process established by the organization could affect the criteria used by the decision-maker.
- Apply the dual process theory perspective of rational decision-making (Kahneman, 2003) to discussions where passion, intuition, and predictability play an important part in the final decision.

ENTREPRENEURSHIP

- *Entrepreneurship*
- *Stages of Growth*
- *New Ventures*

Zoey Koko: Choosing an Alternative Path Forward **29**

Mark P. Rice,* Babson College, [231 Forest StreetBabson Park, MA 02457-0310].

Sara Ferrer launched Zoey Koko in 2017 with the idea of designing bath and body products for young girls and "tweens" (ages 5-12). From the start-up of her venture through the end of 2020, Ferrer had worked as a medical esthetician at a Boston spa as an independent contractor, developing Zoey Koko after work and on the weekends. Ferrer had persevered through a series of setbacks, but not without enduring a lot of stress. After three years of marginal financial performance and zero compensation for her hard work, she had reached a turning point at the end of 2020. Ferrer was unwilling and financially unable to go through another year like 2020. She was committed to deciding by the end of January 2021 whether to continue with Zoey Koko full-time or to wind down her company and pursue a full-time job.

Intended Courses and Levels

This case – and the teaching note – have been written with the expectation that the case will be taught in an introductory entrepreneurship course for undergraduates. The case has been successfully test-taught twice in an undergraduate course (Foundations of Entrepreneurial Management) and once in the capstone project course for MBA students. For MBA students the case study was a useful introduction to Ferrer, who was a guest speaker in the class, but less relevant for the students, given their more advanced work and educational experience. It is best taught toward the end of an entrepreneurship course, after students have been introduced to frameworks for assessing performance during the Existence (startup) stage and exploring how to transition from the Survival stage to the Success stage (defined as sustainability).

Learning Objectives

After working through the case and assignment questions, and engaging in the in-class discussion and exercise, students will be able to understand the progression of a new venture through the first three of the five stages of small business growth:

1. Stage 1 Existence (Startup);
2. Stage 2 Survival; and
3. Stage 3 Success (defined as Sustainability).

- Apply Osterwalder's Business Model Canvas framework to identify internal and external factors that contributed to the transition of a venture from Existence (startup) to Survival.
- Assess the potential of a venture to transition from Survival to Success (sustainability).
- Develop arguments for and against attempting to transition a financially marginal venture from survival to success.

SOCIAL ENTREPRENEURSHIP

- ***Social entrepreneurship***
- *Inclusive business models*
- *Impact model validation*
- *Exiting an impact startup*

Batec Mobility: Creating, Scaling, and Selling an Inclusive Business **41**

Alfred Vernis,* Suzanne Jenkins, and Lisa Hehenberger, Esade Business School [Av. de la Torre Blanca, 59, 08172, Sant Cugat, Barcelona, Spain, alfred.vernis@esade.edu].

Entrepreneur Pau Bach, who had tetraplegia, built Batec Mobility with an inclusive business model in which profit and purpose were tightly integrated. A personal mobility device company, Batec was created by people with disabilities, employed people with disabilities, and aimed to revolutionize mobility for people in wheelchairs. In June of 2019, Bach was considering an offer to purchase his company. Accepting the offer was one of three available courses of action; he could have also leverage the offer to speed negotiations with a pair of Spanish impact investors, or worked to persuade his current investor to reinvest and sell for a higher price in the future. He needed to evaluate which course of action would best address his main goals: ensuring the continued growth of the business and its positive social impact, providing an acceptable exit to his current investor, and meeting his personal and family needs. Leading up to this moment, the case reviews the company's stages of development, the funding it had received, and the process Bach had undertaken to sell the company. In this way, students explore the opportunities and challenges of developing, funding, and selling an inclusive business.

Intended Courses and Levels

This case is designed to be used in Social Entrepreneurship or Impact Investing courses in MBA or MSc-level programs to discuss specific challenges that inclusive businesses and mission-oriented entrepreneurs face when building, funding, and selling their business. It serves to integrate knowledge of entrepreneurial phases and impact investment concepts. For this reason, it works well to use the case when discussing the growth and maturity stage of the entrepreneurial process.

Learning Objectives

The primary learning objectives are to:

- Analyze the integration of profit and purpose in an entrepreneurial business model.
- Evaluate opportunities and challenges for customer and business model validation in a context where rapid experimentation with customers may have ethical or regulatory implications.
- Analyze the characteristics of an impact investor and the implications for a purpose-driven entrepreneur.
- Recommend an exit path based on an assessment of options in relation to the goals and obligations of a purpose-driven entrepreneur.
- Appreciate the challenge of managing tensions between financial and social objectives and the need for perseverance to turn a social or inclusive intention into reality.

SOCIAL ENTREPRENEURSHIP

- ***Social Entrepreneurship***
- *Dual Mission*
- *Hybrid Organizations*
- *Social Entrepreneurship*
- *Missions*
- *Sustainability*

S H E: Style Her Empowered **59**

Michael A. McCollough,* University of Idaho [College of Business and Economics, University of Idaho, P.O. Box 443161, Moscow, Idaho 83844-3161, mccollou@uidaho.edu].

Payton McGriff, founder of the nonprofit S H E (Style Her Empowered) needed to decide on a plan to meet S H E's goal of sponsoring one million girls in primary schools in sub-Saharan Africa by 2030. The COVID pandemic had created a renewed sense of urgency for McGriff and her board. The specific decision McGriff faced was whether to continue to produce the innovative Dress that Grows in-house, combined with the production and sale of fair-trade goods to fund operations, or to outsource the production of school uniforms, relying on fundraising to generate the funds needed. Key to this decision was the fit with the multi-mission of S H E: 1. to educate girls, 2. to employ women, and 3. to practice environmental sustainability.

Intended Courses and Levels

Students will naturally relate to the protagonist, a recent college graduate. Further, they will find McGriff's story compelling. The case is nontechnical, approachable, and for most students an engaging read.

The case can be used in an upper-division undergraduate or graduate (including MBA level) Business Strategy class. The case should be assigned when discussing missions, or dual mission social enterprises, since the case hinges on evaluating the organization's mission in the context of the urgent need and its ambitious growth goals. Simply put, which of the actions before McGriff are compatible with the S H E mission statement?

Mission statements are typically covered within the first few weeks of a strategy class. The coverage of social enterprises and social responsibility varies within the course based on the preference of the instructor.

The case may also be used in an entrepreneurship or social entrepreneurship class, since S H E is the product of a university business plan competition, and was successfully launched. Most business plan competitions have a non-profit or socially responsible track, and the story of McGriff may inspire some students to take their plans, modify them based on feedback, and launch. For students developing social enterprises, understanding the complexity of dual mission organizations is critical.

Interest in dual mission social enterprises (SE) is on the rise (Costanzo, Vurro, Foster, Servato, and Perrini 2014), and the case highlights the natural tension and challenges that such organizations have. As students are attracted to the intuitively simple "do well while doing good" mission of an SE, it is important to demonstrate to students that these organizations are typically more complex to administer and control than traditional for-profits that have a single focus mission statement.

Many teaching cases have a dominant for-profit, male, Caucasian, and developed-world perspective. This case challenges this orientation subtly by its very nature. Some students may have to wrestle with their implicit biases.

Learning Objectives

Students will learn the following:

- To recommend a specific decision based on its consistency with an organization's complex dual mission.
- To understand what empowerment, specifically women's empowerment, means.
- To employ the principles of Fair Trade in the context of the mission-driven decision.
- To evaluate outsourcing in the context of a mission-driven decision.
- To apply the Santos, Pache, and Birkholz (2015) typology of Social Business Hybrids, gaining an understanding of the challenges and tensions implicit in a dual mission organization.
- To evaluate mission creep in the context of a dual mission organization.

STRATEGIC MANAGEMENT

- ***Strategic Management***
- *Sustainability*
- *Environmental Responsibility*
- *Business and Society*
- *Entrepreneurial founders*

Mungo Mill South Africa: Leading a Sustainability Strategy During Covid-19 — 77

Prof Caren Brenda Scheepers,* Maxine Jaffitt, and Candace Dick, University of Pretoria, [scheepersc@gibs.co.za].

The case features Dax Holding, Managing Director of Mungo Mill, Plettenberg Bay, Western Cape Province, South Africa, considering the decisions he needed to make to scale the business given the market demand for its products. He needed to find a way to resolve the apparent values conflict between a number of factors. Their family business was built around being environmentally conscious, sustainable, and valuing the tradition of using antique weaving looms. Intrinsic to this was the preservation of the traditional craft textile business. This presented a conflict when considering the need to achieve a higher volume of sales through digital distribution channels, which was regarded as an impersonal approach and requiring more efficient machinery. Central to its distinctiveness as a business was the concern for the environment, reflected in an ethos of transparency and eco-friendly production, with a focus on organic sourcing of materials such as cotton and bamboo, earning Mungo the Global Organic Textile Standard (GOTS) certification. These factors reflected a strong identity and values framework, and also included its commitment to the upliftment of staff and the local community, as evidenced in Mungo's "Move" program. As Dax considered various options for growing the business, his concerns revolved around continuing Mungo's growth trajectory whilst retaining its identity as an authentic, sustainable, quality, craft products business.

Intended Courses and Levels

The case might be used in undergraduate programs or graduate programs, in courses such as Sustainability, Corporate Social Responsibility, and Strategy.
The case would fit in a fourth year course once students had received a basic level of understanding about strategic positioning of companies. A level of understanding, around sustainability and the role of business in society, and especially the responsibility of business to do no harm (e.g. to the communities around them or the environment), is also necessary. The case could be an assignment towards the final stretch of a course, providing students the opportunity to apply the learnings from the course material and theories and models mentioned in this IM.

Learning Objectives

An improved student ability to:

- Apply an analysis tool, called a SWOT analysis, in identifying the internal strengths and weaknesses, and external opportunities and threats, to a sustainability-driven business;
- Discern the strategic position of a sustainability-driven business;
- Create actions for growth of a sustainability-driven organization;
- Analyse and make decisions where competing interests and values exist.

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.

ISBN 978-1-7377586-5-5