ABSTRACTS ONLY

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OUTSTANDING TEACHING CASES GROUNDED IN RESEARCH

ERIC DOLANSKY, EDITOR

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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:

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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.

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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

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

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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 42 Issue 4 of the *Case Research Journal*. This is the final issue of 2022 and is full of fantastic cases that would work very well in your courses. 2022 marked the year that the North American Case Research Association (NACRA) conference returned to an in-person format, and anyone who attended the meeting in Niagara Falls, Ontario, will tell you that it was so wonderful to be able to see each other in 'real life' again. If you were unable to attend the conference, or have never attended a NACRA conference before, I strongly suggest that you do so. My involvement in the case research community began at regional and NACRA conferences, and it provides an opportunity to be a part of a strong, supportive group of researchers. The 2023 conference will take place in San Antonio, Texas in October 2023. Information about the conference is available at www.nacra.net.

Though it was not intentional, there is a running theme throughout this issue: social impact and responsibility. There was no call for papers for a special issue (though there is a new one – see below), there was no instruction to authors, reviewers, or the editorial team to find cases on this topic, but as it happens all six cases in this issue touch on this theme in some way. I believe this reflects a changing attitude among business researchers, students, and practitioners to look beyond profits at bigger considerations. This position is stated explicitly in "KeHE Distributors LLC: The Shore Power Project," by Ram Subramanian and Michelle DeMoss. In this case a distribution company must consider the financial and non-financial effects of switching to a solution that involves lower emissions of carbon dioxide but additional up-front costs. This case also won the Best Case (Gold) award at the 2021 NACRA conference. Also on the topic of emissions and efforts to curb them is "Social Innovation for Latin America: The Case of Eco Cookstoves," by Vijaya Zinnoury, Erica Berte, and H.G. Parsa. A small non-profit organization, focused on providing environmentally friendly cookstoves to economically-disadvantaged individuals in Latin America, must decide how to enter the Mexican market in a responsible and effective way.

Another case set in Latin America, "EOS International: Scaling Financially Sustainable Impact Through Technologies in Nicaragua and Beyond," by Maria Ballesteros-Sola and John Walker, finds a U.S.-based social enterprise non-profit needing to make tradeoffs between impact, scope of products offered, and finances. Management preferences and the needs of the market are key considerations in this case. Environmental sustainability is the theme of "Creating Waves of Change: Grove Collaborative, the Problem of Plastics, and Innovation for Corporate and Environmental Sustainability," by Alexander Glosenberg, Beth Ritter, and David Choi. The decision-maker in this case must determine if he will make a public promise regarding plastic use in the products his company sells, knowing that even taking steps to reduce the use of plastic may not match the pledge.

Even the cases in this issue that are not explicitly about sustainability or social impact still contain aspects and elements related to this topic. A marketing and branding case, "Made for Drink: Positioning the Brand," by Lucy Gill-Simmen, Anupam Mehta, and Ling Xiao, contains a key marketing decision, positioning, for a company that focuses on bar snacks. The options for positioning include how the product pairs with drinks, the family-owned orientation of the business, and the brand's commitment to environmental causes. "EnactusOC: Motivating a Student Leadership Team During a Global Pandemic," by Kyleen Myrah, Kerry Rempel, and Stacey Fenwick, contains foundational organizational behaviour concepts and models such as Tuckman's four-stage model of team development and Kotter's eight-step change model, but the case focuses on a university-level student competition team that undertakes social-impact projects.

It is my belief that we will continue to see cases that involve, to some degree, issues of social impact and responsibility. This is a good thing and reflects changes in business practice. As a marketing professor myself, I know that customer expectations of companies are changing, and many organizations are looking beyond a narrow, profit-only approach. Businesses operate in communities and benefit from society in many ways. Their ability to, and responsibility to, give back to those societies in direct and indirect ways is only going to increase. As business educators we would be remiss to avoid talking about such issues. It also makes for more interesting cases and decisions when tradeoffs and different considerations, sometimes in opposition to each other (but not always!), are brought to bear. A recent study, written up in the Times of Higher Education, noted that academics still seemed to be prioritizing journal metrics, such as impact factor, over the actual impact of their work on the world around them. I'm glad to see CRJ authors looking at the bigger picture.

I began this editorial with a plug for the upcoming NACRA conference. I will conclude with another request for submissions, this time to our upcoming Special Issue on Short Cases and Micro Cases. The Call for Cases can be found on the NACRA website (www.nacra.net) and the deadline is March 10th, 2023. The special issue editors are asking that you send in short cases (maximum four pages of narrative) or micro cases (maximum two pages of narrative), along with a full, comprehensive instructor's manual, for consideration in this issue.

As always, my virtual door is always open to you for your questions, suggestions, and concerns. You can contact me at edolansky@brocku.ca and I will be happy to answer, help, or discuss. I am very proud to include the six cases that are in this issue, and I think your case courses will benefit from them as well. If you see something that you believe will work for a colleague or a course in your department, please make sure to promote it.

Sincerely
Eric Dolansky, Editor
Case Research Journal

CASE RESEARCH JOURNAL

Ad Hoc Reviewers, 2021-2022

Thank you as well to the hard-working authors who submitted their cases to the Case Research Journal for consideration.

Abstracts Only

ENVIRONMENTAL SUSTAINABILITY

- ***Environmental Sustainability***
- *Corporate Entrepreneurship*
- *Disruptive Innovation*
- *Corporate Social Responsibility*
- *Consumer Packaged Goods*
- *Plastics*

Creating Waves of Change: Grove Collaborative, the Problem of Plastics, and Innovation for Corporate and Environmental Sustainability 1

Alexander Glosenberg,* Loyola Marymount University, Beth Ritter, North Carolina State University, and David Choi, Loyola Marymount University [1 LMU Drive, Los Angeles, 90045- 2659, alexander.glosenberg@lmu.edu].

Grove Collaborative (herein Grove), both a manufacturer of household/personal-care products and an online marketplace offering its own products and those of third parties, was led by its founder Stu Landesberg. Despite Grove's rapid growth as a private company by early 2020, and its prior accomplishments in environmental sustainability, Landesberg had identified that Grove needed to do more to address the issue of plastic waste and to help continue Grove's track-record as a leader in environmental sustainability. Landesberg had decided to aggressively eliminate plastic from all products sold on its online marketplace in approximately five years. What Landesberg was unsure about is how to go about this transition. In particular, Landesberg was contemplating whether or not to make a public pledge. A sense of urgency for a decision is provided by three factors: first, the consumer packaged goods (CPG) sector's lack of progress toward tackling the increasingly problematic, and widely recognized, plastic-waste problem; second, a goal set by the United Nations to accelerate progress toward plastic reduction in the CPG industry by 2025; and third, the behaviors of competitors that approach, or might overtake, the leadership of Grove as a sustainability innovator.

Intended Courses and Levels

The case has students engage simultaneously with issues of corporate innovation and entrepreneurship and environmental sustainability by viewing innovation for environmental sustainability both as an environmental good and as a potential way to prosper as a company. The case is suitable for use in advanced-undergraduate and/or graduate courses on corporate innovation and/or sustainable entrepreneurship. If used in an introductory course, students should already have been exposed broadly to issues of corporate innovation, corporate social responsibility, and competitive advantage before being exposed to this case. Introductory management courses and textbooks are likely to focus on these issues under innovation, sustainability, and strategy chapters or sections. Students do not need to be familiar with the problem of plastics prior to this case as the necessary background is provided in Section 3; however, if the instructor wants to focus on this topic in greater detail, they might have students read an online article and watch an associated video (entitled Plastics 101) prior to discussing the case.

Learning Objectives

The learning objectives of this case are:

- Apply principles of corporate innovation to understand the challenges and the feasibility of a sustainability-based innovation project (Question 1).
- Understand the advantages of a company becoming a certified B Corporation (Question 2).
- Analyze how different types of competitors might pose greater or lesser threats to a company's sustainability innovations (Question 3).
- Evaluate the likely effects of public declarations about a company's sustainability innovations on the industry-wide adoption of those innovations and consumer choices (Questions 4 and 5).
- Develop an approach to simultaneously maximize corporate and environmental sustainability (Question 6).

We note that the current case is applicable to other companies and situations in that many companies attempting to pursue greater social and/or environmental sustainability will be forced to engage with the issue of innovation from the standpoint of the companies' appeal to customers and its relative competitive advantage alongside the question of what is the most effective and impactful method to bring about social and environmental change. As highlighted in greater depth below, such innovation might not lead initially to products and services that are superior to consumers along traditional dimensions (e.g. price, ease of use, quality, etc.) requiring the company to take a longer-term perspective on the value it creates for customers and society.

INTERNATIONAL BUSINESS

- ***International Business***
- *Global Management*
- *Strategic Management*
- *Social Innovation*

Social Innovation for Latin America: The Case of Eco Cookstoves 23

Vijaya Zinnoury*, Erica Berte, Metro State University, and H.G. Parsa, University of Denver [2101 S. University Blvd, Denver CO 80208, Vijaya.Zinnoury@du.edu]].

Eco Cookstoves (EC), an American social enterprise teamed up with the ZSB Foundation in 2007 to reduce indoor air pollution. This case describes EC's strategy of developing custom high-performance cookstoves for the base of the pyramid (BOP) households and its expansion into Honduras and Mexico that began in 2011. The social enterprise was successful in opening an assembly plant in Honduras in 2014 by partnering with the Honduran Government. While the government programs enabled EC to partner with a local non-profit to distribute free eco-friendly planchas to Honduran customers, such programs did not exist in Mexico. So, in 2015, EC had to decide which foreign entry strategy was right for the Mexican market. This case gives instructors the unique opportunity to discuss environmental sustainability issues, apply the Triple Bottomline framework in the context of international entry strategies, and effective social innovation to mitigate indoor air pollution and climate risk.

Intended Courses and Levels

This case is intended for undergraduate and graduate courses in:

- International Business (IB)/ Global Management (GM) (both at the introductory level of the program). Instructors may choose to use this case after having discussed the topic of foreign entry strategies in class. Alternatively, this case can be paired with a discussion on environmental sustainability or a discussion of the Triple Bottom Line framework in IB/GM courses. The first author has successfully used this case in the second half of the course as well as a final exam case.
- Strategic Management. The case can be paired well with the discussion of international/global strategies.

Topics Covered: Scaling Social Innovation; Public-Private Partnerships; Social enterprise business models; Foreign Entry Strategies; Social Innovation and local Economic Development

Learning Objectives

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

- Discover the problem of indoor air pollution (IAP) and its impact on the BOP (LO1).
- Analyze how social innovators, through public-private partnerships, alleviate IAP while creating environmental, social, and economic value in developing countries (LO2)
- Evaluate how an organization should enter in a foreign market by applying the systematic international entry model (LO3).

MARKETING

- ***Marketing***
- *Brand Management*
- *Brand Strategy*
- *Brand Positioning*
- *Brand Identity*

Made for Drink: Positioning the Brand 33

Lucy Gill-Simmen,* Anupam Mehta, and Ling Xiao,
Royal Holloway, University of London [Egham Hill, Egham TW20 0EX, UK. lucy.gill-simmen@rhul.ac.uk].

This case follows Dan Featherstone, an entrepreneur and founder of Made For Drink, a premium bar snacks company he launched in the UK in 2016 to provide food lovers with a perfect snack to accompany alcoholic drinks. Whilst at first enjoying rapid success, winning awards in several different categories and supplying over 300 of the world's leading food & drink establishments, mid-2022 found Featherstone worrying about the future of his business. Having taken a hit in the COVID-19 pandemic, he was preparing to enter a crowdfunding raise for £600,000 and he knew he needed to articulate the fundamental elements of his business clearly to investors. Scrambling to get his pitch and investor pack ready, he found himself in need of a clear brand positioning strategy to communicate to investors. He was considering three positioning options which were aligned with the brand's values. Students must decide which one he should choose.

Intended Courses and Levels

The case is suited for an undergraduate strategic marketing class. It could be introduced midway through the course, after internal and external situational analyses and segmenting and targeting strategies have been covered. The case covers applying a framework to create a brand vision, developing a value proposition, and evaluating a series of brand positioning options before then developing a brand positioning statement. It could also be separately used in an undergraduate brand management course to discuss brand identity, brand vision, and brand positioning. It can be used as both a classroom activity for group work and as an individual written assignment where students have to work independently, reading the case and then answering some of the questions or choosing the positioning statement with their rationale, depending on time allocated.

Learning Objectives

The case presents a small business scenario where the founder and owner are required to decide on a brand repositioning strategy for broader appeal. The student is in the role of the decision maker and the case allows for discussions around the value in having a clear brand vision and value proposition, and developing a positioning strategy based on the parts of the brand vision which will resonate with the market. Upon completion of the case study, students should be able to:

- Understand the meaning of brand positioning,
- Apply Aaker's brand vision framework to identify the key components of a brand identity structure required to create a brand vision,
- Identify the functional, symbolic, and self-expressive benefits of a brand to articulate an appropriate value proposition,
- Critically evaluate alternative positioning concepts,
- Create an effective positioning statement.

ORGANIZATIONAL BEHAVIOUR

- ***Organizational Behaviour***
- *Virtual teams*
- *Motivation*
- *Change Management*
- *Team Development*

EnactusOC: Motivating a Student Leadership Team during a Global Pandemic 49

Kyleen Myrah,*, Kerry Rempel, and Stacey Fenwick, Okanagan College [1000 KLO Road, Kelowna, BC, Canada, V1Y7B7, kmyrah@okanagan.bc.ca].

EnactusOC is a student-led group that had attracted and retained students successfully for over 15 years. In the late spring of 2020, amid the global pandemic, Nicole Sapieha, the current President, has found herself at the helm of an organization of students separated by space and time and lacking opportunities for connection. It soon becomes apparent to Sapieha that interactions will need to be virtual for the foreseeable future, and certainly for the 2020/21 academic year. In addition, the much anticipated and highly rewarding regional and national competitions are moving online. As the Christmas holiday break nears, Sapieha recognizes that team morale is at an all-time low, there is little excitement for competitions, and motivation for leading community projects is waning. This case explores the challenges involved in motivating and organizing a geographically separated team of students without the usual social and emotional benefits of face-to-face connection, and when rewards have changed.

Intended Courses and Levels

This case deals with the challenges involved in motivating and organizing a geographically separated team of students to create meaningful and impactful projects without the usual social and emotional benefits of face-to-face connection. It also explores the difficulties that leaders experience when generating enthusiasm and buy-in when rewards have changed.

Students will find this case engaging as the protagonist and the organization are relatable and the situation is current. Faculty using this case will find it adaptable and useful for illustrating several core topics in undergraduate organizational behaviour classes at the 2nd, 3rd or 4th-year level. Graduate programs requiring advanced analysis can also use this case with the expectation of higher-level discussion responses.

The case focuses on several key areas often covered by this field of study: team development, motivation, and change management. This course can be positioned after these three topic areas are covered, to synthesize the materials and demonstrate how multiple factors affect team development. Another option is to introduce the case when team development is introduced, and then continue discussions after motivation and/or change management, more like an ongoing or "running case." Finally, since it covers three key concepts common to Organizational Behaviour courses, this case could be used as a final assignment or final case exam. To see more discussion around how to teach this case, refer to "suggested teaching plan."

Learning Objectives

After working through the case and assignment questions, students should be able to do the following:

- Apply the stages of team development to a group in transition.
- Analyze motivation theories for a group in transition.
- Create a plan for a team in transition using a change management theory.

SOCIAL ENTREPRENEURSHIP

- ***Social Entrepreneurship***
- *Social Enterprise Non-Profits*
- *Matrix Map for Decision Making*
- *Water Sanitation*
- *Nicaragua*

EOS International: Scaling Financially Sustainable Impact Through Technologies in Nicaragua and Beyond 65

Maria Ballesteros-Sola,* California State University Channel Islands and John Walker, Simpson College, [CSUCI, One University Drive, Camarillo, CA 93012-8599, maria.ballesteros-sola@csuci.edu].

Founded in 2008, EOS was a US-based nonprofit dedicated to using technology to improve livelihood in rural Nicaragua. Over the last ten years, EOS had developed a portfolio of tech products such as ovens or drip irrigation systems that impacted more than 400,000 inhabitants in rural Nicaragua. With a mix of funding strategies, EOS had been able to show steady annual growth in revenues, with roughly 80% coming from grants and donations and the other 20% from fees for services and products paid by its clients. In late 2018, Meier, cofounder, and Rodriguez, Nicaragua Director, found themselves pondering the direction the organization had taken. Running five different product lines was pulling the nonprofit in many directions, so they had to take a hard look at the best way to scale their impact. Should they keep this diversified multi-product approach, or should they narrow down their portfolio and become a one-solution organization? It was time to urgently make a decision to ensure they could maximize EOS' impact in the region and beyond. The 2018 political and civil unrest had severely impacted EOS revenues, and organizational survival was at stake.

Intended Courses and Levels

The case is intended for upper-level undergraduate and graduate courses on Social Entrepreneurship, Sustainability, and Nonprofit Management and Leadership. EOS is a nonprofit, but its founders, as discussed in the questions, had an entrepreneurial mindset, so the case illustrates many of the characteristics of a nonprofit with a dual social-business hybrid logic, benefiting students across disciplines. Specifically, the case introduces the students to an international nonprofit, social enterprise nonprofits, the Nicaragua context, and a recurrent question (financial/impact sustainability) in this type of organization. It is recommended that the case be used halfway into the course once the students are familiar with the social entrepreneurship/social enterprise concept and are ready to deepen their understanding of organizational forms.

Learning Objectives

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

- Distinguish the characteristics of a social enterprise nonprofit vs. a traditional nonprofit, including the distinction between dual value creation.
- Evaluate different product lines incorporating social impact and financial sustainability elements.
- Analyze the strategy of a social enterprise, using the Matrix Map when limited information is available.

STRATEGIC MANAGEMENT

- ***Strategic Management***
- *Sustainability*
- *Materiality Matrix*
- *Financial Returns*
- *Transportation*

Kehe Distributors LLC: The Shore Power Project — 85

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KeHE Distributors LLC., a $5.5 billion in revenues Illinois-based B Corp certified supplier of natural and organic food products across North America, conducted a pilot study in 2020-2021 involving switching to shore power (using electricity instead of a truck's engine power) in bringing the temperature to desired levels in the refrigerated containers in their trucking fleet. The switch would have a positive effect on the environment in terms of lower carbon emissions in addition to cost savings. Tom Harden, KeHE's Senior Manager of Fleet Assets along with Laura McCord, the organization's Executive Director of Sustainability and Corporate Responsibility, had to decide on whether to seek approval for the project using both financial and sustainability metrics or to conduct an additional pilot study to better understand the controllable and uncontrollable factors that led to cost savings. The company had done poorly on the environmental dimension in the 2020 certification. Two factors made the decision both urgent and important. One was the necessity of applying early to receive rebates from state agencies that would help lower the capital cost of the project. The second was the fact that the company was facing a B Corp certification process in two years' time that involved more stringent criteria on the environmental front.

Intended Courses and Levels

Sustainability is seeing increasing coverage in various courses in business programs. This case is best used in an upper-level undergraduate or MBA strategy course since it integrates sustainability within the context of a typical capital budgeting decision. In a strategy course, sustainability is usually covered in the second half of the semester, along with subjects such as corporate governance and social responsibility. The case would be best positioned after the students have had exposure to the basic ideas in sustainability as part of the module on governance and social responsibility. In addition, since financial analysis (payback period and internal rate of return) are important aspects of the analysis, the expectation is that students would have completed their core accounting and finance classes prior to the class where this case is used.

The following is the suggestion to making the distinction between teaching this case in an undergraduate versus an MBA class:

- In doing the financial appraisal of the Stockton pilot study, significant support (a pre-discussion preparation suggestion to use IRR and payback period, providing the regression equation with instructions on how to use it) for an undergraduate class can be provided, while leaving it open-ended in an MBA class. Well-prepared MBA students should note that in the absence of a hurdle rate (discount rate) given in the case, a NPV analysis would involve several assumptions while the more suitable one would be an IRR analysis. In addition, students should catch on to the importance of developing a regression equation to quantify the impact of controllable and uncontrollable factors on cost savings.
- MBA students should be made aware of the readings below, and how they factor in the case analysis. The discussion should organically integrate the readings (with minimal input from the instructor), particularly the Kuehn & McIntire and the Porter& Kramer articles. In contrast, undergraduate students (particularly in classes where they may not have had significant exposure to the case method) may require a stronger intervention by the instructor to integrate the readings. This may involve preparing slides that highlight the key outcomes of the readings and showing them in class as part of the discussion.

Learning Objectives

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

- Explain what B Corporations are, the certification process, their benefits, and their role in helping the transition from a shareholder model to a stakeholder model.
- Analyze the need for making a business case for sustainability.
- Illustrate the importance of materiality in sustainability projects.
- Demonstrate an integrated approach that involves both financial and non-financial metrics in evaluating sustainability projects.

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