

**ABSTRACTS ONLY**

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# **CASE RESEARCH JOURNAL**

**OUTSTANDING TEACHING CASES  
GROUNDED IN RESEARCH**

**ERIC DOLANSKY, EDITOR**

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

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**Outstanding Teaching Cases Grounded in Research**

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# **Case Research Journal**

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# **NACRA**

**NORTH AMERICAN CASE  
RESEARCH ASSOCIATION**

**Editor**

**Eric Dolansky  
Brock University**

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# ***Case Research Journal* Editorial Policy**

## **North American Case Research Association (NACRA)**

### **CASE CONTENT**

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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**

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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

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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

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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

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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

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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](mailto: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/>)
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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, Terry McGovern, [mcgovert@uwp.edu](mailto: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

As you likely already know, Case Research Journal is the journal of the North American Case Research Association (NACRA). Being a part of this organization has many benefits for the editorial team, authors, and reviewers of CRJ, a substantial one being the annual NACRA conference. The timing of this issue is very close to the 2023 NACRA meeting, held in San Antonio, Texas in October.

For many case researchers, there exists a natural progression for our work, especially if publication in a journal like CRJ is a goal. We bring our cases to a regional conference, which exist all over North America as well as in other parts of the world, receive feedback, and submit that case to NACRA. Using the comments, guidance, and advice we receive at the NACRA conference, we prepare our cases for submission to publishers and journals. This was how my case research and publication journey began; I had a case, sent it to the Administrative Sciences Association of Canada (ASAC) conference, and with the encouragement of mentors there, sent it to my first NACRA conference. The following year, that same case became my first CRJ publication.

Conferences are front-of-mind for me this year because, as part of my duties as editor, I have had the pleasure and honour of visiting many regional conferences. Though I had participated in virtual conferences held by ASAC and the Asociacion Latinoamericana de Casos (ALAC) in 2022, this year I went to the conferences of the Southeastern Case Research Association (SECRA), the Society for Case Research (SCR), and the CASE Association. During the rest of my term as editor I hope to find opportunities to join the Southwestern Case Research Association (SWCRA), Western Casewriter's Association (WCA), the Caribbean Case Researchers Association (CCRA), and the International Case Research Association (ICRA). These regional associations are invaluable for case researchers at all experience levels.

The NACRA conference itself is three days with a community of engaged, knowledgeable, and motivated case researchers, focusing on writing, teaching, innovating, and exploring cases. If you have not attended a NACRA conference, know that it is a different experience from most academic conferences, in that the conversations are mostly focused on collaboration, development, and community, and less on adding a line to an academic resume or poking holes in one another's research. The goal of the conference is for everyone's work and skills to improve, which requires preparation (conference attendees are expected to read and provide feedback on all cases at their roundtable), listening, engagement, and an open mind.

Of the cases in this issue of CRJ, three were previously presented at a NACRA conference: "Tweets, Talk, and Testimony: is Twitter a Publisher, Platform, Public Space, or Something Else?" by Janet L. Rovenpor and Grishma Shah, which takes a topic much in the news, Twitter, and provides a different perspective on the challenges it faces in terms of regulation and ethics; "Caged or Cage-Free?" by Karen E. Boroff, Karen Meleta, and Paula Becker Alexander, a case that takes a different difficult issue, the treatment of animals, and examines a business decision that may be more complex than it initially seems; and "Dr. Wehrheim Winery: To Grow or Not to Grow?" by Marc Dressler and Ram Subramanian, in which two generations of a family-run winery have different conceptions of how to grow. I am confident that if you asked the authors of these cases whether attending NACRA improved their cases prior to submission to the journal, they would say yes.

The other three cases, though not initially discussed at a conference, are no less interesting or impressive. "Columbia Green Technologies (A): Scaling in the Green Roof Market," by Charla Mathwick,

approaches quantitative analysis in a case in a very accessible way, and as a result presents a decision-making process that is grounded in data but not overwhelming. “Can Hens Save Dodiya Farms?” by Kinjal Jethwani and Kumar Ramchandani, also involves a fair amount of financial and quantitative analysis, but balances this with qualitative considerations, as the owner of a farm in India makes a diversification decision. “iCreate’s Turnaround Proposal,” by Andrea Sutherland, Paul Golding, and Lisa Facey-Shaw, takes a look at an attempt by the founder of a Jamaican training company to raise money for a strategic shift; both the financial and governance aspects provide valuable learning opportunities.

In this space I often urge readers of this journal to consider adopting these cases in your courses and urging your colleagues to do the same. Building on the information about the NACRA conference above, another benefit I have found in attending the conference and being a part of a community of case researchers is the access to, and information about, what these researchers are working on. Many of the cases in my case course are included because I learned about them through the NACRA conference. In attending a roundtable related to your area of research and teaching, you will have the opportunity to read and discuss several cases that may end up in your classrooms. So yes, please share the information about the cases in this (and other) issues of CRJ, but also look for other opportunities, such as regional and national (and international) conferences, to build your case courses.

As always, if you have questions, comments, or suggestions, feel free to contact me at [edolansky@brocku.ca](mailto:edolansky@brocku.ca). I am happy to receive your cases through ScholarOne, to discuss your work via e-mail, and to help you with your own journey as case researchers, with the goal of publishing your work. And if you do come to a conference, and I am there, please say hi!

Sincerely  
Eric Dolansky, Editor  
*Case Research Journal*

# Abstracts Only

## COMMUNICATION

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- *Communication*
  - *Business and Society*
  - *Business Ethics*
  - *Social Media*
  - *Digital Platforms*
  - *Misinformation*
- Tweets, Talk and Testimony: Is Twitter a Publisher, Platform, Public Space, or Something Else?** 1
- Janet L. Rovenpor\* and Grishma Shah, Manhattan College [4513 Manhattan College Parkway, Riverdale, New York 10471-4004, janet.rovenpor@manhattan.edu.]

In January 2021, Twitter CEO Jack Dorsey knew he would be asked to testify before Congress about Twitter's role in propagating false news and misinformation. Dorsey described Twitter as a "digital public square" and was a vocal supporter of the U.S. Constitution's first amendment (which protected freedom of speech). Central to his testimony was a controversy involving Internet neutrality: Was the Twitter social media service a neutral platform? If so, each user was responsible for his or her content; Twitter could not be held accountable for slanderous, hateful, or untrue information that users propagated. Was Twitter a publisher? If so, Twitter, akin to news organizations, was responsible for content it propagated. Section 230, an amendment to the Communications Decency Act, further complicated matters, permitting platform hosts to restrict offensive content while shielding them from user-generated content liability. Given this ambiguity, how should Dorsey prepare for the next hearing?

### Intended Courses and Levels

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This case explores a wicked (multi-faceted, multi-stakeholder, complex) social problem that has come under the scrutiny of the U.S. Congress. It asks students to determine appropriate messaging and solutions to the problems associated with fake news for the CEO of a social media company. It is suitable for use in an undergraduate course on business, government, and society; this is the primary focus of this IM. It is also appropriate for an undergraduate or graduate-level course on ethics and corporate social responsibility or in a business communications course.

### Learning Objectives

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- After reading a law or regulation, explain whether it clearly or unclearly states the responsibilities and privileges of the people or organizations affected by it (as a necessary first step in evaluating a law or regulation's effectiveness in achieving its stated purpose).
- Using the (IA3) Framework, analyze a complex issue in light of relevant actors, interests, arenas, information, assets and other issues.
- After using the (IA3) Framework to analyze a complex issue, recommend specific actions a leader (or other managers) can take to effectively address challenges associated with it.
- (Optional): Prepare to testify in a congressional hearing: write a script for a five-minute oral introduction and prepare well-organized supporting notes for use during the hearing.

# CORPORATE GOVERNANCE

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- *Corporate Governance*
- *Financial Analysis*
- *Right's Issue*

## iCreate's Turnaround Proposal

23

Andrea Sutherland,\* Paul Golding, and Lisa Facey-Shaw, University of Technology, [237 Old Hope Road, Kingston 6. Jamaica, 876-909-7603, atsutherland@utech.edu.jm]

On May 17, 2022, Tyrone Wilson, Chief Executive Officer (CEO) and President of iCreate Limited, a fledgling creative training institute, needed to fundamentally pivot. The company had made losses since its inception in 2018 and had raised equity and borrowed funds to finance its operations. On December 31, 2021, accumulated losses totaled J\$122.1 million. The auditors had raised significant doubt on the company's ability to continue as a going concern and some board members were in muted agreement. The prospect of Wilson losing control of the company, or worse, liquidation, loomed large.

In response, Wilson proposed a turnaround strategy in which a rights issue would be offered to shareholders to raise additional funds. The proceeds would be used to acquire an outdoor advertising company to improve iCreate's bottom line. The plan also included restructuring the company into five divisions: Training, Advertising, Media & Entertainment, Tech & E-Commerce, and Real Estate. He estimated that he could raise J\$275 million and the proceeds would be used for inter alia acquisition of a digital advertising company and repayment of debt.

Wilson wondered how the board would receive the rights issue. Were the projections too optimistic? The board meeting was scheduled for May 19, 2022, at 8:00am, two days away; he had little time to prepare to be persuasive and fine tune the details. He made a mental note that convincing the board would be the first hurdle. He would next need to convince the shareholders to subscribe to the rights issue. Based on the previous losses, would they?

## Intended Courses and Levels

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The iCreate Turnaround case can be used for students enrolled in undergraduate and first year graduate students in corporate governance, dealing with the topic of raising capital through a rights issue. The case focuses on the financial challenges of iCreate, which has incurred over J\$120 million in losses since its inception in 2018. The case allows students to access the complexities of a rights offer, and an understanding of corporate governance, and the role of various participants in the direction and performance of corporations.

## Learning Objectives

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After reading the case study, students should be able to:

- Compute financial ratios and use them to understand the financial status of the company.
- Assess the complexities related to a rights issue.

- Understand corporate governance and the role of various participants in the direction and performance of corporations.
- Recommend a set of points to convince the Board to accept the turnaround strategy.

## CORPORATE SOCIAL RESPONSIBILITY

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• <b><i>Corporate Social Responsibility</i></b>	<b>Caged or Cage-Free?</b>	39
• <i>Materiality Assessment</i>	Karen E. Boroff,* Karen Meleta, and Paula Becker Alexander, Seton Hall University [400 South Orange Avenue, South Orange, NJ 07079-2697, karen.boroff@shu.edu]	
• <i>Stakeholder Assessment</i>		
• <i>Food Industry</i>		

When Mel Mathers, the chief sustainability officer of a food cooperative, the Independent Food Retailers Consortium (IFRC), was flooded in October 2019 with emails from animal rights activists demanding the cooperative sell only cage-free eggs and make a pledge now to do so by 2025, he had to prepare a brief and recommendation to IFRC's board. In turn, IFRC's board of directors would make a decision on whether to pledge to sell only cage-free eggs in its grocery stores or continue to offer its customers a choice among the different egg production systems. Mathers examined the organization's policy statements, including one on animal welfare. He studied IFRC's financial materiality chart. Mathers began researching egg production systems. Mathers wondered how he could navigate the seemingly contradictory tradeoffs with IFRC's policies, animal husbandry science, environmental impacts, and responsiveness to the many stakeholders in its operating environment.

### Intended Courses and Levels

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This case is appropriate for MBA courses centering on corporate social responsibility, materiality, and stakeholder analysis. It has been tested in precisely this course. The case is also appropriate for courses centering on food, food production, food marketing, and similar courses in the food industry. The case was tested in a blended undergraduate and graduate course on The Business of Food, where interdisciplinary themes of corporate social responsibility and food production intersected. The case can also be used in upper-level undergraduate courses where the topic of stakeholder analysis is presented. These courses, usually Principles of Marketing or Principles of Management, cover this topic in the beginning chapters of the respective discipline, when students study general and specific environments of a firm, as well as corporate social responsibility.

### Learning Objectives

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- To understand how stakeholder analysis and materiality assessment may impact managerial decision-making.
- To apply company policy statements to provide direction on managerial decision-making.
- To recognize that managerial decisions impacting stakeholders often require trade-offs and to consider how managers might react to stakeholders who believe their interests were not advanced.

- **Finance**
- *Accounting*
- *Project Evaluation*
- *Project Finance*
- *Capital Budgeting*
- *Poultry and egg production*

### Can Hens Save Dodiya Farms?

55

Kinjal Jethwani and Kumar Ramchandani,\* L.J. University, [Near Sarkhej-Sanand Circle, Off S.G. Road, Ahmedabad, Gujarat, India, 382210, +919898167171 kumarramchandani@ljku.edu.in]

In May 2021 Ranjit Dodiya was seeking a reliable second income stream; he considered whether to launch an egg-laying business. Was this a good idea? How much time would it take to recoup his initial investment? What if sales were not as high as he hoped? What if chicken feed or other operating costs were higher than planned? If he took out loans, would the business be sufficiently profitable to service them? How likely was it that he would be able to set aside some profits from this business to insure against future floods, droughts, and other crop calamities?

The case gives students an opportunity to analyze a current agribusiness operation and a proposed new operation (a Go/No-Go decision). Based on financial and operational analysis, including consideration of foreseeable adverse events that threatened crops, and other foreseeable adverse events that threatened egg-laying, how attractive was this proposition?

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### Intended Courses and Levels

The case is designed for use in an agri-business, banking, corporate finance, or small business course delivered in an undergraduate, MBA, or adult continuing-education program. This IM describes its use in a corporate finance class, in which the aim is for students to analyze a go/no-go decision involving the launch of a new business operation.

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### Learning Objectives

- Analyze foreseeable business risk scenarios for a particular business organization located in a particular geographic and socio-economic context.
- Use NPV and IRR calculations to inform a significant financial business decision and explain the limitations of each technique.
- Calculate the debt service coverage ratio (DSCR) for a loan to support a proposed new business and discuss the financial implications.
- Examine the viability of new business combining both qualitative and quantitative factors.

# STRATEGIC MANAGEMENT

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<ul style="list-style-type: none"><li>• <b>Strategic Management</b></li><li>• <i>Scaling Entrepreneurial Ventures</i></li><li>• <i>Stakeholder Analysis</i></li><li>• <i>Environmental Sustainability</i></li><li>• <i>Gender Bias in Venture Capital Funding</i></li></ul>	<b>Columbia Green Technologies (A): Scaling in the Green Roof Market</b>	<b>65</b>
	Charla Mathwick* Portland State University, [P.O. Box 751, Portland, Oregon, 97207-0751, mathwickc@pdx.edu]	
	Vanessa Keitges stepped into the role of CEO at Columbia Green Technologies (CGT) in 2010, growing it to become the dominant green infrastructure and green roofing materials supplier on the West Coast. The Portland, Oregon-based company offered customizable green roofing systems that harnessed nature-based technologies to mitigate the damage caused by stormwater runoff. With 2500 roof garden installations under her belt, Keitges wanted to scale her sales and marketing operation to capture the emerging opportunity across the North American market. The green roofing industry was projected to experience a CAGR of 16.2%, building to a \$5.37 billion global opportunity by 2030. Working with her executive team, Keitges was preparing for a Q1, 2023 Series C funding round to finance the major rollout of her business. The immediate question was where to locate CGT's expanded sales force and how to prioritize the targeted geographic markets. Compelling business rationale as well as opportunity framing to mitigate the known gender bias in VC funding would need to be reflected in the eventual funding pitch.	

## Intended Courses and Levels

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This case is targeting graduate or upper-level undergraduate courses in Business Strategy, Marketing Strategy, Business to Business Marketing, and/or Entrepreneurship. The case is relevant to strategic decisions that involve the concept of stakeholder management as a component of opportunity identification. Regardless of the course, this case is likely to be most relevant early in the term, as it reflects the type of analysis occurring during the initial phase of the strategic planning process and prior to the development of a marketing plan. The case includes an EXCEL spreadsheet for analysis of market trend data. Students are assumed to have a beginner level of proficiency with EXCEL, being comfortable specifically with the 'Data Sort' command.

## Learning Objectives

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This case is designed to address four Learning Objectives:

- Identify, classify, and prioritize stakeholders involved in the B2B buying process, in terms of impact on firm strategy.
- Utilize stakeholder priorities to guide a trend analysis in support of corporate strategy-setting, by sorting and analyzing secondary data to compensate for inconsistent and incomplete information.
- Translate the results of stakeholder and trend analysis into a preliminary VC pitch to summarize a firm's geo-expansion strategy.
- Reframe identified venture risks as potential opportunities to mitigate gender bias known to be directed toward female founders by venture capital investors.



# STRATEGIC MANAGEMENT

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<ul style="list-style-type: none"><li>• <i>Strategic Management</i></li><li>• <i>Growth strategy</i></li><li>• <i>Strategic management</i></li><li>• <i>Entrepreneurship</i></li><li>• <i>Family business</i></li><li>• <i>Strategic positioning</i></li><li>• <i>Business growth</i></li></ul>	<p><b>Dr. Wehrheim Winery: To Grow or Not to Grow?</b> 85</p> <p>Marc Dressler*, Ludwigshafen University of Business and Society and Ram Subramanian, Stetson University [Ernst-Boehe Str. 4, D-67059 Ludwigshafen, marc.dressler@hwg-lu.de]</p> <p>Dr. Wehrheim Winery, a family business located in the Palatinate region of Germany, faced a critical decision. While the business was controlled by the third-generation owner, Karl-Heinz, his son, Franz, had come up with a plan of launching a secondary line of wines exclusively for the retail channel. Because of the winery's limited supply of grapes from its vineyard, Franz wanted to source grapes from the market for the proposed new line. While Karl-Heinz was reluctant to support the idea because of the risks involved, Franz saw this as the opportunity to showcase his leadership skills as a prelude to becoming the fourth-generation owner of the business. Franz had a month to come up with a sound rationale to get his father's support for the secondary line.</p>
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## Intended Courses and Levels

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This case is best suited for a senior-level undergraduate or an MBA strategy class. While a major part of the context is the family's involvement in the business, the decision to be made involves strategy at the business level. With minimal prompting by the instructor (as described in the IM), the family context can be woven into the strategy discussion. Placement should be in the middle of the course, after coverage of business strategy concepts.

## Learning Objectives

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

- Understand the context that impacts a firm's growth decisions.
- Analyze the strategy implications of family ownership of a business.
- Apply the concept of strategic positioning and examine its implications for a firm's future.
- Evaluate growth options in adjacent markets



# 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.

