

N A C R



**2024 Program**  
of the  
**North American Case  
Research Association**

Volume 38  
66<sup>th</sup> Year

**Rosen Plaza Hotel**  
Orlando, Florida  
**October 17 - 19, 2024**

Melanie Reed, VP Programs & Conference Chair  
Bob Gaglardi School of Business, Thompson Rivers University,  
Kamloops, British Columbia, Canada



## Table of Contents

|  |    |
|--|----|
| NACRA 2024 ANNUAL MEETING SCHEDULE.....  | 5  |
| Thursday, October 17.....  | 5  |
| Friday, October 18.....  | 7  |
| Saturday, October 19.....  | 10 |
| NACRA 2024 CONFERENCE CHAIR’S WELCOME.....   | 12 |
| THANK YOU TO OUR SPONSORS!.....  | 14 |
| CASE RESEARCH JOURNAL.....   | 15 |
| Editorial Board.....   | 15 |
| Ad Hoc Reviewers 2023-2024.....  | 16 |
| CASE RESEARCH FOUNDATION.....  | 17 |
| Paul R. Lawrence Doctoral Student and Early-Career Faculty Fellowship Program..... | 17 |
| JOHN SEEGER START-UP CASES WORKSHOP.....   | 18 |
| PEDAGOGY TRACK.....  | 21 |
| NACRA 2024 ROUNDTABLE SCHEDULE.....  | 22 |
| Accounting, Finance, and Economics Cases.....                                      | 22 |
| Cases Written in Chinese Language.....   | 23 |
| Cases Written in Portuguese Language.....  | 24 |
| Cases Written in Spanish Language.....   | 25 |
| Cases Written in French Language.....  | 26 |
| Corporate Governance and Ethics Cases.....   | 27 |
| Digital Technologies and Operations Cases.....                                     | 28 |
| Entrepreneurship, Family, and Small Business Cases.....                            | 29 |
| Marketing Cases and International Business Cases.....                              | 30 |
| Organizational Behavior/Human Resource Management Cases.....                       | 32 |
| Social Impact and Sustainability Cases.....  | 34 |
| Strategy and Policy Cases.....   | 36 |
| NACRA 2024 PROGRAM COMMITTEE.....  | 38 |
| Track Chairs and Co-Chairs.....  | 38 |
| 2023-2024 NACRA OFFICERS.....  | 40 |
| Board of Directors.....  | 40 |
| PARTICIPANT INDEX.....   | 41 |
| NACRA PAST PRESIDENT.....  | 44 |
| NACRA FELLOWS.....   | 45 |
| DISTINGUISHED CONTRIBUTORS.....  | 46 |
| NACRA 2024 AWARDS.....   | 47 |
| 2025 CALL FOR CASES & PROPOSALS.....   | 48 |
| CONFERENCE VENUE MAP.....  | 50 |

*This 2024 Program has been compiled using information on accepted cases and planned presentations.*

*This Program document does not confirm that a case or presentation was delivered at the conference and is not confirmation of conference participation.*

*The official record of cases and presentations delivered at the 2024 NACRA Conference can be found in the 2024 Proceedings of the North American Case Research Association, Volume 38.*

# NACRA 2024 ANNUAL MEETING SCHEDULE

## Thursday, October 17

| Time               | Room                                     | Meeting/Participants   |
|--------------------|--|--|
| 8:00 AM – 5:00 PM  | Registration Desk C & D (Ballroom Foyer) | NACRA Registration and Sponsor Exhibition (Closed During Meals)  |
| 8:30 AM – 12:00 PM | Salon 9                                  | Paul R. Lawrence Fellowship Recipient Workshop (By Invitation Only)<br><br>Anne T. Lawrence, San Jose State University (emerita), & Case Research Foundation<br><br>María Ballesteros-Sola, California State University Channel Islands & Case Research Foundation |
| 12:00 PM - 1:00 PM | Salon 10                                 | NACRA Executive Board Meeting (NACRA Executive Board Only)   |
| 1:00 PM - 3:00 PM  | Salon 5                                  | John Seeger Start-up Cases Workshop (Registrants, Mentors, and Guests)<br><br>Randall Harris, Texas A&M U - Corpus Christi<br>Janis Gogan, Bentley University (emeritus)   |
| 1:00 PM - 3:00 PM  | Salon 12                                 | John Seeger Start-up Cases Workshop - WIP (Work-In-Progress) Roundtable<br><br>Christopher M. Cassidy, Sam Houston State University<br>James (Jim) Fisher, St. Louis University  |
| 1:30 PM - 4:30 PM  | Salon 3                                  | Pedagogy Track:<br><br>Developing Case Scholarship in Teaching and Research – Roundtable Session for Accepted Papers & Presentation Proposals (Guests Are Welcome)<br><br>S. Bruce Thomson, MacEwan University   |
| 3:00 PM - 3:30 PM  | Mezzanine Alcove 1                       | <b>Refreshment Break with Snacks</b>   |
| 4:00 PM - 4:30 PM  | Salon 4                                  | Pre-Conference Track Chair Meeting with VP Programs & Conference Chair Melanie Reed (Track Chairs & Co-Chairs Only)  |

| <b>Time</b>          | <b>Room</b>            | <b>Meeting/Participants</b>   |
|----------------------|------------------------|---|
| 4:00 PM –<br>5:00 PM | Salon 11               | CRJ Editorial Board Meeting (Editorial Board Members Only)  |
| 5:00 PM -<br>6:00 PM | Ballroom D             | <p><b>Welcome to NACRA 2024!</b></p> <p>VP Programs &amp; Conference Chair, Melanie Reed, Thompson Rivers University</p> <p>Introduce Keynote Speaker</p> <p><b>“Informing with Case Studies: Within and Beyond the Classroom”</b></p> <p><i>Presented by T. Grandon Gill, Academic Director of the Doctor of Business Administration program at the University of South Florida’s Muma College of Business</i></p> <p>Join us for an enlightening keynote presentation as T. Grandon Gill shares his innovative informing model, tailored to reflect the diverse needs of stakeholders navigating intricate and complex business school environments. Through practical examples and his latest research, Dr. Gill will showcase the tangible impact of case studies and provide invaluable insights on how we can enhance our ability to convey this impact persuasively. Don't miss this opportunity to gain a fresh perspective and elevate your case writing endeavours.</p> |
| 6:00 PM -<br>7:00 PM | Poolside<br>Upper Deck | <b>Welcome Reception</b>  |
| 7:00 PM              | Ballroom C             | <p><b>Conference Opening Dinner</b></p> <p>Conference Welcome &amp; Announcements</p> <p>Introduction of the Paul R. Lawrence Fellows</p>   |

## Friday, October 18

| <b>Time</b>  | <b>Room</b>                              | <b>Meeting/Participants</b>                                     |
|--|--|---|
| 7:00 AM - 8:00 AM  | Ballroom C                               | Breakfast Buffet  |
| 8:00 AM - 4:30 PM  | Registration Desk C & D (Ballroom Foyer) | NACRA Registration and Sponsor Exhibition (Closed During Meals) |
| 8:00 AM - 12:00 PM   |  | <b>Case Roundtable Tracks -- Day 1</b>                          |
|  | Salon 8                                  | Accounting, Finance, and Economics                              |
|  | Salon 1                                  | Cases written in Chinese Language                               |
|  | Salon 3                                  | Cases written in French Language                                |
|  | Salon 7                                  | Cases written in Portuguese Language                            |
|  | Salon 10                                 | Cases written in Spanish Language                               |
|  | Salon 6                                  | Corporate Governance and Ethics                                 |
|  | Salon 12                                 | Digital Technologies and Operations                             |
|  | Salon 9                                  | Entrepreneurship, Family, and Small Business                    |
|  | Salon 5                                  | Marketing and International Business                            |
|  | Salon 13                                 | Organizational Behavior and Human Resource Management           |
|  | Salon 4                                  | Social Impact and Sustainability                                |
|  | Salon 14                                 | Strategy and Policy   |
| 10:00 AM – 10:30 AM  | Mezzanine Alcove 11                      | Morning coffee/tea break  |
| 12:00 PM - 1:30 PM   | Ballroom C                               | <b>Case Research Journal Awards Lunch</b>                       |
| <b>New Views (Parallel) Sessions – Block One (1:30 PM – 2:30 PM)</b> |  |   |

| <b>Time</b>  | <b>Room</b> | <b>Meeting/Participants</b>   |
|--|-------------|---|
| 1:30 PM -<br>2:30 PM   | Salon 14    | <p><b>Tackling the Challenges of Creating and Publishing Cases with AI (Panel Discussion)</b></p> <ul style="list-style-type: none"> <li>• Vijaya (Vi) Zinnoury, University of Denver (Moderator)</li> <li>• Theresa Coates, Limestone University (Moderator)</li> <li>• María Ballesteros-Sola, California State University Channel Islands</li> <li>• Vicky Lester, CEO, The Case Centre</li> <li>• Eric Dolansky, Brock University &amp; Editor, CRJ</li> <li>• Jim Fisher, Saint Louis University</li> <li>• Marilyn L. Taylor, University of Missouri at Kansas City (emeritus)</li> </ul> |
| 1:30 PM -<br>2:30 PM   | Salon 11    | <p><b>(Re)Energize your Courses in the Age of AI with Real-Time “Ripped-from-the-Headlines” Cases (Panel Discussion)</b></p> <ul style="list-style-type: none"> <li>• Janis Gogan, Bentley University (emerita)</li> <li>• Francisco Jesus Lopez Lubian, IE Business School</li> <li>• Olga Kandinskaia, University of Limassol, Cyprus</li> <li>• Anna Czeglédi, Conestoga College</li> </ul>  |
| 1:30 PM -<br>2:30 PM   | Salon 12    | <p><b>Leveraging a PRL Fellowship to Build a Career in Management Education and Research (Workshop)</b></p> <ul style="list-style-type: none"> <li>• Anjan Ghosh, Nazarbayev University</li> </ul>  |
| 2:30 PM -<br>2:45 PM   |             | <b>Transition Break – No Refreshments</b>   |
| <b>New Views (Parallel) Sessions – Block Two (2:45 PM – 3:45 PM)</b> |             |   |
| 2:45 PM -<br>3:45 PM   | Salon 11    | <p><b>From Ibero-America to the World: Building a Flourishing Case Writing Community (Panel Discussion)</b></p> <ul style="list-style-type: none"> <li>• María Ballesteros-Sola, California State University Channel Islands (Moderator)</li> <li>• Maria Helena Jaén, Cladea Balas Case Consortium (CBCC)</li> <li>• Josep Lluís Cano Giner, Asociación Latinoamericana de Casos (ALAC)</li> <li>• Alfred Vernis, Social Enterprise Knowledge Network (SEKN)</li> </ul>  |



| <b>Time</b>  | <b>Room</b>         | <b>Meeting/Participants</b>   |
|--|---------------------|---|
| 2:45 PM - 3:45 PM  | Salon 13            | <p><b>Are Multi-media Cases an Effective Learning Tool or a Distraction? (Paper Presentation)</b></p> <ul style="list-style-type: none"> <li>• David Wood, Ivey Business School</li> </ul>  |
| 2:45 PM - 3:45 PM  | Salon 14            | <p><b>CRJ Editorial Team – The ‘First Last Mile’ for Submissions (Panel Discussion)</b></p> <ul style="list-style-type: none"> <li>• Eric Dolansky, Brock University</li> <li>• Randall Harris, Texas A&amp;M University</li> <li>• Ram Subramanian, Stetson University</li> <li>• Meredith Woodwark, Wilfrid Laurier University</li> </ul> |
| 2:45 PM - 3:45 PM  | Salon 12            | <p><b>Open Access Teaching Case Journal (OATCJ) – Why Publish Open Access Cases? (Panel Discussion)</b></p> <ul style="list-style-type: none"> <li>• Jane Gravill, Conestoga College</li> <li>• Kevin McDermott, Conestoga College</li> <li>• Anna Czegledi, Conestoga College</li> <li>• Redwan Siddiqui, Conestoga College</li> </ul>     |
| 3:45 PM - 4:00 PM  | Mezzanine Alcove 11 | <b>Refreshment Break with Snacks</b>  |
| <b>New Views (Parallel) Sessions – Block Three (4:00 PM – 5:00 PM)</b> |                     |   |
| 4:00 PM - 5:00 PM  | Salon 11            | <p><b>Impact Through Case Teaching and Writing: Creative Approaches and Recognition (Presentation)</b></p> <ul style="list-style-type: none"> <li>• Vicky Lester, CEO, The Case Centre</li> </ul>   |
| 4:00 PM - 5:00 PM  | Salon 12            | <p><b>A New Way of Developing &amp; Teaching Cases: Our Breakout Learning Experience (Panel Discussion)</b></p> <ul style="list-style-type: none"> <li>• Michael Goldman, University of San Francisco</li> <li>• Maria Ballesteros - Sola, California State University – Channel Islands</li> </ul>   |

| <b>Time</b>          | <b>Room</b>     | <b>Meeting/Participants</b>  |
|----------------------|-----------------|--|
| 4:00 PM -<br>5:00 PM | Salon 13        | <p><b>Unveiling the Naked Truth: Steering Through the Blackhole of AI in Case Teaching (Roundtable Workshop)</b></p> <ul style="list-style-type: none"> <li>• Vijaya (Vi) Zinnoury, University of Denver</li> <li>• Theresa Coates, Limestone University</li> <li>• Erica Berte, Metropolitan State University</li> <li>• J. Kay Keels, Coastal Carolina University</li> <li>• Marilyn L. Taylor, University of Missouri at Kansas City (emeritus)</li> <li>• Tania Casado, Universidade de São Paulo</li> </ul> |
| 5:30 PM –<br>6:30 PM | Upper Pool Deck | <b>Appetizer and Cocktail Reception</b>  |

**Saturday, October 19**

| <b>Time</b>            | <b>Room</b>         | <b>Meeting/Participants</b>  |
|------------------------|---------------------|--|
| 7:30 AM -<br>8:30 AM   | Ballroom C          | <p><b>NACRA 2024 Conference Awards &amp; Appreciation Breakfast</b></p> <p>Announcement of NACRA 2025 Annual Meeting &amp; Conference by VP Programs 2025 Mike Annett, MacEwan University, Edmonton, Alberta</p> |
| 8:30 AM –<br>10:30 AM  |                     | <b>Case Roundtable Tracks -- Day 2</b>   |
|                        | Salon 8             | Accounting, Finance, and Economics   |
|                        | Salon 3             | Cases written in French Language   |
|                        | Salon 6             | Corporate Governance and Ethics  |
|                        | Salon 12            | Digital Technologies and Operations  |
|                        | Salon 9             | Entrepreneurship, Family, and Small Business   |
|                        | Salon 5             | Marketing and International Business   |
|                        | Salon 13            | Organizational Behavior and Human Resource Management  |
|                        | Salon 4             | Social Impact and Sustainability   |
|                        | Salon 14            | Strategy and Policy  |
| 10:30 AM –<br>11:00 AM | Mezzanine Alcove 11 | <b>Refreshment Break with Snacks</b>   |

| <b>Time</b>  | <b>Room</b> | <b>Meeting/Participants</b>  |
|--|-------------|--|
| 11:00 AM - 12:00 PM                                  | Ballroom C  | <p><b>Closing Session “What should I do with my case now?”</b></p> <p>Case Journal Editors/Publishers’ Panel Discussion:</p> <ul style="list-style-type: none"> <li>• Eric Dolansky, <i>Case Research Journal</i> by NACRA</li> <li>• Melissa Close, <i>The Case Journal &amp; Emerging Markets Case Studies</i> by Emerald Publishing</li> <li>• Laura Woodman, Ivey Publishing</li> <li>• Vicky Lester, The Case Centre</li> <li>• Jane Gravill, <i>Open Access Teaching Case Journal (OATCJ)</i></li> </ul> |
| <b>The following meetings are by invitation only</b> |             |  |
| 12:00 PM - 1:00 PM                                   | Salon 2     | Paul R. Lawrence Fellows Debrief   |
| 12:00 PM - 1:00 PM                                   | Salon 5     | Post-Conference Track Chair Meeting: Debrief and 2025 Planning (2024 Conference Chair & VP Programs, Melanie Reed, 2024 VP Programs – Elect, Mike Annett, Track Chairs & Co-Chairs)  |
| 12:00 PM - 1:30 PM                                   | Salon 3     | NACRA Presidents’ Advisory Board Meeting   |
| 1:30 PM – 4:00 PM                                    | Salon 4     | NACRA Board Meeting  |
| 6:00 PM – 8:00 PM                                    |             | NACRA Board Dinner   |

## NACRA 2024 CONFERENCE CHAIR'S WELCOME

Welcome to the NACRA 2024 Annual Meeting & Conference in Orlando, Florida! It is NACRA's 66<sup>th</sup> year, and I am honored and grateful that we can come together in this beautiful place. I am also very excited that we have had an incredible response to this year's conference. The program committee accepted 141 submissions for full cases, 7 submissions for pedagogy papers, 42 start-up cases, and 12 New Views sessions proposals with over 175 people registered to attend! We anticipate some lively discussion in our 12 case tracks, which includes 4 language tracks. The teaching and research landscape has changed dramatically over the last couple of years with increased access to generative AI platforms and changing expectations of students and institutions. The topics in this year's New Views sessions will deliver opportunities to explore this evolution, while also staying true to our mandate of promoting excellence in case research and teaching.

We are also thrilled to have representation from many local Florida schools in this year's program, including several students and our keynote speaker, Dr. T. Grandon Gill. Dr. Gill is the Director of the Doctor of Business Administration program at the University of South Florida's Muma College of Business in Tampa. He is going to share his innovative informing model and latest research that showcases the tangible impact of case studies and how we can persuasively convey this impact. This past year, discussions about the impact of case writing and teaching have been important in academia and I am confident Dr. Gill's talk will leave us with new inspiration and insight. We are also incredibly fortunate to offer a pre-conference workshop called, "Teaching with the Case Method" this year, hosted by Clinton Daniel and Matthew Mullarkey, also from USF's Muma College of Business and supported by Eric Dolansky, Editor of the Case Research Journal. This is a new addition to our agenda, and we are thrilled by the response from our community to this extra opportunity for learning.

Orlando is a magical place, not just because of all the wonderful ways to be entertained, but also because of the warm hospitality of our hosts at the Rosen Plaza Hotel. I simply can't say enough about the incredible team who have been working hard to make us feel welcome. Our hotel has spacious rooms, fantastic restaurants and a beautiful pool. We are also very fortunate that the hotel is centrally located on International Drive which is bustling with a range of recreation, entertainment and dining options. Of course, if you have an extra day or two, you don't want to miss out on visiting some iconic places like Universal Orlando Resort™, SeaWorld®, and Walt Disney World®. If you prefer something more local, I highly recommend an airboat tour in one of the nearby waterways. This is a unique experience where you get to enjoy fresh air, spectacular scenery and if you are lucky, to catch a glimpse of a Florida gator!

A conference like this does not happen without the time and effort of many dedicated people. I am extremely grateful to the track chairs and co-chairs who read the cases and papers, find reviewers, manage communication with authors and deliver a valuable conference experience. Their work is the core of this event, and I have been consistently inspired by their dedication to NACRA and to promoting and advancing case writing in their academic community. I am pleased that we can offer four language tracks in our program this year and want to recognize our Russian language track leaders, Aigerim Raimzhanova and Mariya Yesseleva-Pionka who were unable to attend in person. I would also like to extend a special thank you to Randall Harris who chairs our John Seeger Start-up Cases Workshop. This track provides a unique opportunity for new case authors

to receive hands on instruction on case writing and seasoned authors to receive guidance on a new case approach with the help of a team of experienced mentors. Finally, I would like to recognize our Paul R. Lawrence Fellowship Program and the 10 recipients joining us this year from five different countries. Thank you to Anne T. Lawrence for her tireless efforts to support early career case writers in this unique mentoring opportunity.

On behalf of the NACRA community, I also want to thank our sponsors. Their contributions help support the Case Research Foundation and support the delivery of this annual event. Please visit our sponsor page to see all of the incredible contributors to this year's meeting.

I would also like to thank our NACRA Executive Board for their guidance and support as I embarked on this journey one year ago. My personal thanks for helping me organize this conference go to Olga Kandinskaia (NACRA 2024 President), Nicole Amos (Immediate Past President), Kathryn Savage (Treasurer), Eric Dolansky (CRJ Editor), Janis Gogan (Chair, NACRA Advisory Board), Atherine Lee (Communications), Terry McGovern (Case Marketing) and Anne T. Lawrence (CRF).

I would also like to extend special recognition to A. Kay Guess, who had to step down from the Treasurer role earlier this year. Kay has been a tireless member of this board for 13 years and has been instrumental in building the association we benefit from today. Her guidance and support even before the in-depth planning began and all throughout the first part of this journey, made my job so much easier and joyful. Her passion for NACRA and this community is inspiring, and she will be greatly missed at this year's conference.

Finally, I would like to extend a special thank you to Mike Annett (VP Programs-Elect) who took on several organizing functions this year including planning our Friday night social event and producing our latest offering, the Case Community Conversations podcast. He has been a wonderful co-pilot always willing to help and offer guidance. My appreciation also extends to the entire Program Committee who made planning this conference enjoyable and possible. NACRA is an association of volunteers and the people working behind the scenes to bring this experience to you, our members and attendees, are knowledgeable, supportive, and dedicated.

Of course, without you, we would not have a conference to organize. Thank you for submitting your case or paper, reviewing and taking the time and effort to be with us in Orlando. On behalf of our Program Committee, I hope you have an enlightening and enjoyable time and that you fully embrace the warmth and energy of the community we have all collectively created.



Melanie Reed

NACRA VP Programs and Conference Chair, 2024

Bob Gaglardi School of Business & Economics, Thompson Rivers University, Canada

## THANK YOU TO OUR SPONSORS!

We are extremely grateful to the following organizations who sponsored the Case Research Foundation and the 2024 NACRA Conference with funding and in-kind contributions.



# CASE RESEARCH JOURNAL

Thank you to our colleagues who led the Case Research Journal in 2023-2024.

## Editor

Eric Dolansky, *Brock University*

## Associate Editors

Karen Boroff, *Seton Hall University*

Randall Harris, *Texas A&M University – Corpus Christi*

Ram Subramanian, *Stetson University*

## Editorial Assistant

Christina Tathibana, *University of Regina*

## Editorial Board

William A. Andrews, *Stetson University*

Kathryn J. Aten, *Naval Postgraduate School*

Maria Ballesteros-Sola, *CSUCI*

Mary Barrett, *University of Wollongong*

Heidi M. Bertels, *City University of New York*

Karen Boroff, *Seton Hall University*

Alva Butcher, *University of Puget Sound*

James Carroll, *Georgian Court University*

Sofy Carayannopoulos, *Wilfrid Laurier University*

Danielle Clark, *Hillsborough Community College*

Carolyn Conn, *Texas State University*

Michelle Demoss, *Stetson University*

Lisa Eshbach, *Ferris State University*

Deborah R. Ettington, *The Pennsylvania State U.*

Josep Franch, *ESADE Business School*

John E. Gamble, *Texas A&M - Corpus Christi*

Armand Gilinsky, *Sonoma State University*

Janis Gogan, *Bentley University*

Michael Goldman, *University of San Francisco*

Peter Goulet, *University of Northern Iowa*

Gina Grandy, *University of Regina*

Randall Harris, *Texas A&M - Corpus Christi*

Sean Hennessey, *U. of Prince Edward Island*

Cynthia Ingols, *Simmons College*

Lynn A. Isabella, *Darden School of Business*

Anwar Khurshid, *Lahore U. of Mgmt. Sciences*

Anne T. Lawrence, *San Jose State University*

John J. Lawrence, *University of Idaho*

Derek Lehmborg, *North Dakota State University*

Nancy Levenburg, *Grand Valley State University*

Lynda Livingston, *University of Puget Sound*

Francisco J. López Lubián, *IE Business School*

Robert A. MacDonald, *Crandall University*

Charla Mathwick, *Portland State University*

Michael McCollough, *University of Idaho*

Terry McGovern, *University of Wisconsin Parkside*

Charles Mossman, *University of Manitoba*

Kyleen Myrah, *Okanagan College*

Margaret J. Naumes, *University of New Hampshire*

William Naumes, *University of New Hampshire*

Ken Ogata, *York University*

Kay Palan, *University of Alabama*

Juan M. Parra, *INALDE Business School*

Tia Quinlan-Wilder, *University of Denver*

Marlene Reed, *Baylor University*

Glenn Rowe, *Ivey School of Business, Western U.*

Marvin Ryder, *McMaster University*

Kathryn S. Savage, *Northern Arizona University*

Colleen Sharen, *Brescia University College*

Grishma Shah, *Manhattan College*

Jeff P. Shay, *Babson College*

Javier Silva, *IAE Business School, U. Austral*

Ram Subramanian, *Stetson University*

Erin Sullivan, *Suffolk University*

Linda E. Swayne, *U. North Carolina Charlotte*

Sonia Toson, *Kennesaw State University*

Susan White, *University of Maryland*

Meredith Woodwark, *Wilfrid Laurier University*

Vijaya Zinnoury, *University of Denver*

# CASE RESEARCH JOURNAL

## Ad Hoc Reviewers, 2023-2024

Shalini Aggarwal, *Chardigarh University*  
Nicole M. Amos, *Johnson & Wales University*  
Mike Annett, *MacEwan University*  
Ann Armstrong, *University of Toronto*  
Erica Berte, *Metropolitan State University*  
Jeff Bowen, *University of Denver*  
Fernanda Cahen, *Escola Superior de  
Propaganda e Marketing*  
Gustavo Calatrava, *Austral University*  
Jorge Calvo, *Globis University*  
Michael Carillo, *University of Florida*  
Majid Eghbali-Zarch, *Memorial University of  
Newfoundland*  
Joseph Gerard, *Western New England University*  
Paul Golding, *University of Technology*  
Andres Gonzalez Rey, *Universidad Icesi*  
Jane Gravill, *Conestoga College Institute of  
Technology and Advanced Learning*  
Charles Hilterbrand, *University of Mississippi*  
Sarah M. Holtzen, *Missouri Southern State  
University*  
Charles Kalnbach, *University of Oregon*  
Brooke Klassen, *University of Saskatchewan*  
Sheri L. Lambert, *Temple University*

Manu Mahbubani, *Wilfrid Laurier University*  
Ruben Mancha, *Babson College*  
Ebrahim Mazaheri, *Wilfrid Laurier University*  
Maryam Memar Zadeh, *University of Winnipeg*  
Moriah Meyskens, *University of San Diego*  
Huy Nguyen, *University of Sussex*  
Sandeep Puri, *Asian Institute of Management*  
Farzana Quoquab, *Universiti Teknologi  
Malaysia*  
Stephanie Raible, *University of Delaware*  
Kumar Ramchandani, *LJ University*  
Janet Rovenpor, *Manhattan College*  
Achinto Roy, *Deakin University*  
Michele Ruiters, *University of Pretoria*  
Roberto S. Santos, *University of Massachusetts  
Lowell*  
W. Scott Sherman, *Texas A&M Corpus Christi*  
James Spee, *University of Redlands*  
Cheri Thomas, *University of Tennessee Southern*  
Janice Winch, *Pace University*  
Rohan Wright, *The Mico University College*  
Fatih Yegul, *Conestoga College*  
Cheri Young, *University of Denver*

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



# CASE RESEARCH FOUNDATION

## Paul R. Lawrence Doctoral Student and Early-Career Faculty Fellowship Program

**Chair of the CRF Board:** Anne T. Lawrence, *San José State University* (emerita)

The Case Research Foundation (CRF): ([www.caseresearchfoundation.org](http://www.caseresearchfoundation.org)) promotes awareness, development, and dissemination of case research, writing and teaching through the provision of scholarships, grants, and more. Currently, the major activity of the CRF is administering the Paul R. Lawrence Fellowship Program. This program provides fellowships to doctoral students and faculty in the first three years of a tenure-track or equivalent appointment to be trained in case research, writing, and teaching at the NACRA annual meeting. This is the 10th year of the program's operation. The CRF has now awarded a total of 92 fellowships.

In 2024, the Case Research Foundation awarded fellowships to the following 10 individuals:

|                                   |                |  |
|-----------------------------------|----------------|--|
| Mithila Guha                      | United States  | San José State University                |
| Ulrik Roehl                       | Denmark        | Copenhagen Business School               |
| Xiangming (Tommy) Tao             | United Kingdom | University of Sussex                     |
| Ann Mary Varghese                 | India          | Indian Institute of Technology Kharagpur |
| Pankaj Anand                      | United Kingdom | University of Strathclyde                |
| Homeira Ekhtari                   | Canada         | Conestoga College                        |
| InHaeng Jung                      | United States  | Sonoma State University                  |
| Ryan DeFronzo                     | United States  | California State University, Fullerton   |
| Vijay Krishnamurthy               | India          | University of Mysore                     |
| Pouneh (Penny) Sadeghi Shabestari | United States  | University of Wisconsin-Milwaukee        |

In addition, this year the CRF welcomes to the conference the following member of a prior cohort of Paul R. Lawrence Fellows, who has had a start-up case accepted for presentation:

|              |       |  |
|--------------|-------|--|
| Samir Biswas | India | Indian Institute Of Management–Udaipur |
|--------------|-------|--|

The Case Research Foundation (CRF) is a nonprofit public benefit corporation. The first fellowships were awarded at the 2015 NACRA Annual Conference. The CRF is a 501(c)3 organization. Donations to the Foundation are tax-deductible, to the extent allowed by law. For more information on the program and how to donate, please go to [www.caseresearchfoundation.org](http://www.caseresearchfoundation.org).

The Case Research Foundation thanks Emerald Publishing, Ivey Publishing, Open Access Teaching Case Journal, and SAGE Business Cases, as well as the many individual donors who have generously supported the work of the Case Research Foundation and its fellowship program this year.

Information on the process for 2025 applications will be available in February 2025 via CRF website.

# JOHN SEEGER START-UP CASES WORKSHOP

Thursday, October 17, 1:00 PM – 3:00 PM

**Workshop Host:** Randall Harris, Texas A&M University – Corpus Christi

## Mentors

We thank the following Mentors for reading, reviewing, giving feedback, and guiding the round table discussions for participants who are learning the art and craft of case writing.

Nicole Amos, University of Massachusetts Amherst  
Christopher M. Cassidy, Sam Houston State University  
Eric Dolansky, Brock University  
James (Jim) Fisher, St. Louis University  
Armand Gilinsky, Sonoma State University (emeritus)  
Janis Gogan, Bentley University (emeritus)  
Michael Goldman, University of San Francisco  
Anne T. Lawrence, San Jose State University (emerita)  
Rebecca Morris, Westfield State University  
Jeff Shay, Babson College  
Javier Silva, UCU Business School  
Ram Subramanian, Stetson University  
Cheri Thomas, University of Tennessee Southern  
John Varlaro, Johnson & Wales University  
Meredith Woodwark, Wilfrid Laurier University  
Vijaya (Vi) Zinnoury, University of Denver

| Case Author(s)   | Start-up Case Title   |
|--|---|
| Muntasir Alam  | Kevin’s Exit from Heatherica and the Aftermath of an Exit   |
| Eman Almehdawe   | Ambulance Offload Delays at The Region of Waterloo, who is Responsible for the Delays?                          |
| Hani AlShami<br>Anna Czegledi<br>Lom Harshni Chauhan<br>Fatih Yegul<br>Carol Samuels<br>Alexander Miller | Ethical Considerations and Hiring Biases in AI-powered HR Systems at Workday                                    |
| Hani AlShami<br>Anna Czegledi  | Balancing Mission and Viability in Non-Profit Organizations: Strategic Choices in Immigrant Employment Services |
| Pankaj Anand<br>Pardeep Singh Attri  | Bill Gates meets Dolly Chaiwallah: “One kadak chai please”  |
| Julia Baird  | WWF-Canada: Designing Collaborative Watershed Governance to Meet Conservation Objectives, Now and in the Future |
| Samir Biswas   | Indian Railways: Capacity Augmentation in Electrical Power Stations   |

| <b>Case Author(s)</b>  | <b>Start-up Case Title</b>  |
|--|---|
| Carla Marieli Delmiro Capeli<br>Victor Silva Corrêa<br>Helena Belintani Shigaki<br>Pedro Lucas de Resende Melo | Entrepreneurial Marketing at Life Institute:<br>A Case Study in an Emerging and Developing Country        |
| Ryan F. DeFronzo   | Will Pepsi Lose its Fizz? Marketing in the Age of AI  |
| Vafa Saboori Deilami<br>Chang Seob Yeo<br>Yung-Jae Lee<br>Sarah Lee  | Labcon North America  |
| Priya Dozier   | A Fintech Fumble: The Conscious Uncoupling of FIS and Worldpay  |
| Homeira Ekhtari  | Switching to a Net-Zero Home: A Good Choice or a Headache?  |
| Fernando Garcia<br>Stephen Ray Smith<br>Amy Burger   | Latin American Association  |
| Victoria Geyfman<br>Christian Grandzol   | Business Valuation of ABC Liquors   |
| Lucy Gill-Simmen<br>Ling Xiao  | Made for Drink: Crafting a Sustainability Brand Story   |
| Mithila Guha   | Leveraging Social Impact Marketing: REI's #OptOutside Campaign  |
| William C. Hawks   | Company Policies Matter: Starbucks Versus the Memphis Seven   |
| InHaeng Jung   | Sustaining Lodi Vines Amid Economic and Environmental Shifts  |
| Vijay Krishnamurthy<br>Sanjeev Tripathi  | Anantapur Sports League: Social Impact Through Football   |
| Tatiana Levit<br>Nourhene Ben Youssef  | University of Regina Club: Marketing to the Rescue?   |
| Ganlin Mia Li  | Good-Ark's Family Culture and Innovation Dilemma  |
| Moises Librado-Gonzalez<br>Natanael Ramirez-Angulo<br>German Osorio  | Ciadmype UABC: A Center for Poor Microenterprises in Tijuana, Mexico                                      |
| Ebrahim Mazaheri   | Reality Foods: Navigating Growth in the B2B Food Distribution Sector                                      |
| Terry McGovern<br>Helene Johnson   | Helene Johnson: Now You See Me, Now You Don't   |
| Sonia Mehrotra<br>Anna Czeglédi  | Royal Botanical Gardens, Ontario: The Sustainability Leaders  |
| Mónica Olalde<br>Lilia Patricia López  | The Decision-Making Process at Critical Moments – CNH Case Study  |
| Krystal C. Onyema<br>Shari S. Bowen  | He's Driving me Crazy: On Power & Influence Among Peers   |
| Sritama Pal<br>Samir Biswas  | Kendriya Vidyalaya: Ensuring Continuous Learning through Innovative Responses During Environmental Crisis |
| Anna Papazian  | Precision Auto: Amplifying Success Through Strategic Finance  |

| <b>Case Author(s)</b>  | <b>Start-up Case Title</b>  |
|--|---|
| Ulrik B.U. Roehl   | Pushing the Limits of Digital Government: What's Next, KOMBIT?  |
| William D. Schneper<br>Sujal Shah  | The Chaudhary Group in 2024: Looking Towards the Future   |
| Pouneh Sadeghi Shabestari,   | The Shadow Artist: The battle of Ownership in the Generative AI Era                                     |
| W. Scott Sherman<br>Randall D. Harris  | Boeing 2024: Searching for a New CEO  |
| Redwan Siddiqui<br>Fatih Yegul   | CN Rail Acquires TransX: Offering Door-to-Door Convenience of Trucking with the Cost-Efficiency of Rail |
| James Siew   | Reconciling Corporate Social Responsibility Within Sustainability                                       |
| Tyler F. Stillman<br>Dave Lunt   | Alexander the Great: Entrepreneur?  |
| Xiangming (Tommy) Tao  | From Dorm Room to Foorsteps: The rise of HungryPanda in Global Food Delivery                            |
| Ann Mary Varghese<br>Rudra Prakash Pradhan   | Zum's Sustainability Aspirations: Sparking School-Bus Electrification Across America                    |
| Janis Warner<br>Kamphol Wipawayangkool   | Shutting Down the Phishing Hole to Avoid a Crisis: Carrot or Stick?                                     |
| Anna Tsui Po Yung  | Teaching HRM in the AI era: Selecting Neufast's AI Video Interview System.                              |
| Dina Majid Z<br>Nischal Anand Singh  | Claudine Gay: Victim or Scapegoat?  |
| Muhammad Zahid<br>Munaza Bibi<br>Muhammad Zeeshan Mirza,<br>Haseeb Ur Rahman<br>Ahmad Asad | RJ Mall, Karachi Pakistan: A Case of Fire Safety Concerns   |

**Pedagogy Track:  
Developing Case Scholarship in Teaching and Research**

**Thursday, October 17, 1:30 PM – 4:30 PM**

**Track Chairs:** S. Bruce Thomson, MacEwan University

**Co-Chairs:** Anjan Ghosh, Nazarbayev University Graduate School of Business,  
and Shreya Mishra, Birla Institute of Management Technology

**Session Chair:** S. Bruce Thomson

**Papers & Proposals**

**Authors**

Cases as Intellectual Contributions

Sarah Holtzen

Global Faculty Perspectives on Active Learning via Live Case Projects

Sonia Mehrotra  
Anna Czegledi  
Olga Kandinskaia

The Dilemma of Teaching Unions in SE USA

Theresa Coates  
Marilyn Taylor  
Janet Bartholow

Navigating Complexity in Teaching with Cases: Systems Thinking and Concurrent Engineering Approaches

Hani AlShami  
Anna Czegledi

Using Assessment Centre Methodology as a Pedagogical Innovation During Case Teaching in Talent Management Courses in HRM

Sushmita Srivastava  
Debmallya Chatterjee

Writing Teaching Notes

S. Bruce Thomson  
Jasmin Lin  
Daisy Wang  
Vicki Nie

# NACRA 2024 ROUNDTABLE SCHEDULE

Friday, October 18, 8:00 AM – 12:00 PM  
& Saturday, October 19, 8:30 – 10:30 AM

## Accounting, Finance, and Economics Cases

**Track Chair:** Anna Czegledi, Conestoga College  
**Co-Chair:** Jan Serrano, Francis Marion University

**Session Chair:** Jan Serrano

| <b>Cases</b>  | <b>Authors</b>  |
|---|---|
| Johnson and Johnson: An Unusual Stock Exchange Offer  | Susan White<br>Karen Hallows  |
| Hindenburg Research & The Adani Group (2023)  | Vijaya Zinnoury<br>Vishwanatha S.R.<br>Durga Prasad<br>Srinija Kallakuri                            |
| Lagom Design Shop: The Exclusive Edge   | Lauren Nicholaas<br>Alexander Miller  |
| Drakko a Bumpy Ride   | Juan Pablo Davila<br>Javier Rovar<br>Alvaro Moreno  |
| A New Beginning for Mostly Mental Shuttles  | Wayne Singular  |
| Real Estate Investment Analysis: Hyatt House  | Glenn Williamson<br>Felipe Ernst  |
| From Informality to Growth: Challenges in the Accounting Practices of a Peruvian Corner Store Owner | Gloria Maria Regina Zambrano<br>Aranda<br>Luis Demetrio Gomez Garcia<br>Emerson Jesus Toledo Concha |
| How Can She Make a Legitimate Real Estate Purchase Offer in a Non-Disclosure State?                 | Charles Hilterbrand Jr.<br>Sergio Garate<br>Violetta Davydenko                                      |

## **Cases Written in Chinese Language**

**Track Chair:** William Wei, Algoma University

**Co-Chair:** Haibo Hu, Jiangxi University of Finance and Economics

**Session Chair:** William Wei

### **Friday Only**

#### **Cases**

Moutai in Canada: Cultural Mix Marketing

Are Insurance Donations ESG Innovation or Marketing  
Innovation? A Case Study of Ping An Insurance's Donations  
During the Pandemic

Win-Win or Loss-Loss: The Merger and Acquisition of  
Suning Tesco and Carrefour

#### **Authors**

Haotian Jiang  
Haibo Hu  
William Wei  
Haitao Lu  
Jie Zhou  
Le Cheng

Robert Xu  
Yijun Liu  
Linda Lihong Zhou

Yan Zhang

## **Cases Written in Portuguese Language**

**Track Chair:** Tania Casado, University of São Paulo

**Co-Chair:** Erica Berte, Metropolitan State University

**Session Chair:** Tania Casado

### **Friday Only**

#### **Cases**

Elipse: uma decisão nas nuvens

Do berço à liderança: a maioria de uma mulher e de um negócio

O Habib's e a Difícil Conquista da América

#### **Authors**

Ricardo Engelbert  
Eugenio M. Gonçalves  
Fabio C. Barbosa

Aparecido Borghi  
Tania Casado

Rodrigo Gallo  
Tania Casado



## **Cases Written in Spanish Language**

**Track Chair:** Josep Lluís Cano Giner, ESADE Business School (Ramon Llull University)

**Co-Chair:** Lorena Andrea Palacios Chacón, Tecnológico de Monterrey

**Session Chair:** Josep Lluís Cano Giner

### **Friday Only**

#### **Cases**

Wellcome: Marketing Estratégico en Entornos Complejos

Internacional de Diagnostico: Descentralizando El  
Diagnóstico de Enfermedades Infecciosas

Accompanying and Educating: IRMA's Path in Addressing  
Gestational Loss

La Inteligencia Artificial en M4D.Clinic

#### **Authors**

Ernesto Barrera  
Xavier Cárdenas

Juan Vicaria  
Diego Valbuena

Karina Isabel Salinas Solis  
German Osorio Novela  
Natanael Ramirez Angulo

Josep Lluís Cano Giner

## **Cases Written in French Language**

**Track Chair:** Christine Kratz, ICN Business School

**Co-Chair:** Sabrina Hombourger-Barès, École des sciences de l'administration Université  
TÉLUQ

**Session Chair:** Christine Kratz

### **Cases**

Netflix, un entrant potentiel qui a crevé l'écran!

La coopérative apicole Idboustia: reconquérir le marché marocain par  
l'authenticité et la confiance

Ajabane Lamta (Les Fromages de Lamta): Quelle Stratégie de  
Communication Pour Commercialiser Une Nouvelle Marque de  
Fromage à Base du Lait de Chamelle

Fromagerie Donge: Quels Relais de Croissance Pour Préparer Une  
Releve Familiale Responsable?

### **Authors**

Ernest Kuekam  
Stéphane Gagnon

Fatima Ezzahra Ouboutaib  
Abdellatif Ait Heda  
Soumiya Mekkaoui

Abdellatif Ait Heda

Sabrina Hombourger-Barès  
Christine Kratz

## **Corporate Governance and Ethics Cases**

**Track Chair:** Vijaya Zinnoury, University of Denver

**Co-Chair:** Theresa Coates, Limestone College

**Session Chair:** Vijaya (Vi) Zinnoury

### **Cases**

Shake Up at Shake Shack?

Trouble at Tara

Rethinking Governance at a Non-Profit Hospital Foundation

Sleepwear Safety: Sizing Up the Situation

SETT: Breaking Free from Corruption at Bogotá's Transit Office

### **Authors**

Ram Subramanian

Helene Johnson  
Matthew Mullarkey

Brooke Klassen  
Stephanie Young

Drew DuBois  
James E. Fisher  
Rob Boyle

Liliana López-Jiménez  
Olga Anzola-Morales

# Digital Technologies and Operations Cases

**Track Chair:** Clinton Daniel, University of South Florida

**Co-Chair:** G. Shankaranarayanan, Babson College

**Session Chair:** Clinton Daniel

## Cases

## Authors

Khonology: Digitising the Booming Bond Market

Pius Oba  
Amanda Bowen  
Garth Balabanoff

Raia Drogasil 2022

Ricardo Engelbert  
Fabio C. Barbosa  
Eugenio M. Gonçalvez

Workforce Agility: Transformational Leadership in the Digital Age

Nicole Stuart

Indigestion in Bleaksburg

David Chinn

LAAM: A Fashion Company?

Hassan Chaudhry  
Hafsa Mahmood

Data Management for Digital Transformation – A Higher Education Institute (HEI) Case Study

Aditi Divatia  
Jyoti Jagasia

Statue of Unity – An Engineering Marvel

Jyoti Jagasia  
Preeti George

The Great Insurance Caper 2.0: Unlocked by Lax Security

Raji Raman

Will GenAI Help or Hurt Massachusetts Student Consultants Working for Jamaican Clients?

Edward Walters  
Zohaib Qazi

## **Entrepreneurship, Family, and Small Business Cases**

**Track Chair:** Sonia Mehrotra, S.P. Mandali's Prin. L.N. Welingkar Institute  
of Management Development and Research

**Co-Chairs:** Sarah Holtzen, Missouri Southern State University

**Session Chair:** Sonia Mehrotra

### **Cases**

### **Authors**

Veiled Disclosure: Should the Hatter Angel Network Stay in the Deal?

William Andrews

Bubble Well's Dilemma: One Immigrant Entrepreneur's Journey of Resilience and Expansion

Daisy Wang  
Jasmin Lin  
Chialing Hsieh

Integral Hockey: An Entrepreneur's Journey

William R. Holmes

A New Target for Dart Drones? When Good Business Ideas Get Grounded.

Jessica M. George  
Michelle Pannone

Managing Growth at Highland Brewing Company

Justin Kent  
Tiberiu Ungureanu  
Mark Lewis

The Three Sisters and their Regrowth

Gina Grandy  
Emily McNair  
W. Glenn Rowe

Time Fayus Inc: Expansion Opportunities in Nigeria

Mc Edward Murimbika

## **Marketing Cases and International Business Cases**

**Track Chairs:** Silvia Cacho-Elizondo, IPADE Business School (Marketing),  
and Grishma Shah, Manhattan College (IB)

**Co-Chair:** Michael Goldman, University of San Francisco (Marketing)

### **Table 1**

**Session Chairs:** Silvia Cacho-Elizondo

| <b>Cases</b>  | <b>Authors</b>                             |
|---|--|
| Designing a New Brand Portfolio for ITC Mangaldeep  | Ruppal Walia Sharma<br>Janani Kandaswamy   |
| Arte Capital: Integrating Human and Artificial Intelligence to Revolutionize the World of Art | Silvia Cacho-Elizondo<br>Antonio Casanueva |
| Carolina Hurricanes: A Whale of a Branding Decision   | Michael Stanko                             |
| PeerDrop - Data-Driven Growth Through Persona-Based Targeting                                 | Umamah Hashemi<br>Saima Hussain            |
| STEM Toys by ENGINO (Cyprus): A Marketing Plan for the New Subscription Box                   | Mike Berry<br>Olga Kandinskaia             |
| Targeting Success: Power Cement's Approach to Brand Recognition                               | Saima Hussain<br>Umamah Hashemi            |

**Table 2**  
**Session Chair:** Grishma Shah

| <b>Cases</b>  | <b>Authors</b>                                    |
|---|---|
| Imbibitive Technologies – The Challenge of a Superior Product           | Navjote Khara<br>Eric Dolansky                    |
| From Cheers to Controversy: Bud Light’s Brand Marketing Challenges      | Kevin McDermott<br>Rob McLean<br>Vickie Quigg     |
| Samsonite's Market Penetration and Strategic Growth in India            | Megha Choudhary<br>Dinesh Sharma<br>Arti D. Kalro |
| Modi Toys: Growing and Navigating a Niche Brand in a Global Marketplace | Grishma Shah<br>Adeniyi D. Olarewaju              |
| Taiga Motors: An Expansion Strategy to Sustain Market Leadership        | Amir Taherizadeh<br>Hamid Etemad                  |

**Table 3**  
**Session Chair:** Michael Goldman

| <b>Cases</b>  | <b>Authors</b>   |
|---|--|
| 1 FIT. Get Fit Whenever and Wherever You Want.                                  | Elmira Bogoviyeva  |
| Rablo: The Challenge of Commercializing an AI Solution                          | Antonio P. Casanueva<br>Silvia Cacho-Elizondo<br>Carlos A. Castellanos |
| Johnson & Johnson: Defending Leadership in a Crisis                             | Gustavo Calatrava<br>Tomas Bouthemey                                   |
| Space Electronics: Struggle to Withstand  | Osama J. Butt  |
| Distribution at Stellarlube: Slow and Steady is the Winning Strategy. Or is it? | Renuka Kamath  |

# Organizational Behavior/Human Resource Management Cases

**Track Chair:** Jyotsna Bhatnagar, Management Development Institute

**Co-Chair:** Meredith Woodwark, Wilfrid Laurier University

## Table 1

**Session Chair:** Meredith Woodwark

| <b>Cases</b>  | <b>Authors</b>   |
|---|--|
| Crystalize with Huawei's Transformation – Hellen's Musical from Becoming to Being                                   | Zheni Wang   |
| It's Just a Joke  | Jasmin Lin<br>Daisy Wang<br>Vicky Nie<br>Bruce Thomson |
| The Maternal Wall   | Courtney Shields                                       |
| Money for Nothing!  | William Carty<br>Marko Horn                            |
| Take a Load Off Mannie: The Weight of Occupational Health and Safety Experiences in the Construction Skilled Trades | Arica Oliver<br>Mark Julien                            |
| Unlocking Multiversity Potential A Case Study in Transformation - Qatar Foundation                                  | Deval Kartik<br>Tomas Farchi                           |
| What's in a Title?  | Ashley Stebbins<br>Jasmin Lin<br>Vasilios Scoumis      |



**Table 2**  
**Session Chair: Juan Parra**

**Cases**

Augmenting Employee Engagement Through Generative AI-  
Case of Infedo

ICare Inc. Needs Immediate Hire

Owners Not Renters: Should Our Employee Owners Sacrifice  
for a Better Future?

Passing The Baton: Bert Hash's Legacy of Leadership At  
MECU

Should We Terminate this Employee? An Organizational  
Justice issue in a Social Justice Organization

Workin' (Not Just) For a Living: A Career Plan for a Blue-  
Collar Worker

**Authors**

Sushmita Srivastava  
Shailaja Jha

Guorong Zhu  
Chloe Browning

Charles Onstott  
Daria Efimova

Maya Kirkland  
Kyler McGillis  
Karen Proudford  
James Calvin

Jason James

Juan Parra  
Liliana Diaz

## **Social Impact and Sustainability Cases**

**Track Chair:** María Ballesteros-Sola, Chair, California State University Channel Islands

### **Table 1**

**Session Chair:** María Ballesteros-Sola

| <b>Cases</b>  | <b>Authors</b>   |
|---|--|
| Veritas, a Supermarket Competing with Purpose   | Alfred Vernis<br>Veronica Devenin  |
| Just Because You Want to Change the World, it Doesn't Mean You Have to Start a Nonprofit              | Claudia Barrulas Yefremian   |
| Expansion or Consolidation: the Case of the Club de Niños y Niñas de Tijuana, Baja California, Mexico | Manuel Ruiz Paez<br>Gabriela Ruiz Paez<br>Roberto Iván Fuentes Contreras |
| ACS Clothing: Enabling Fashion Brands and Retailers to Join the Circular Economy                      | Marie-Cécile Cervellon<br>Lindsey Drylie Carey<br>Aileen Stewart         |
| Sustainability Decisions for a University-Owned Winery: Cal Poly San Luis Obispo                      | Maria Ballesteros-Sola<br>Inhaeng Jung<br>Terry Lease<br>Armand Gilinsky |
| Social Venturing in Guatemala: Restaurante Chichoy - Post Pandemic                                    | Yolanda Sarason<br>Claire Dallies<br>Laura Robey                         |

**Table 2**  
**Session Chairs:** Jane Gravill & Stephanie Raible

| <b>Cases</b>  | <b>Authors</b>   |
|---|--|
| Khayelitsha Cookies: Empowering Women One Bite at a Time  | Emmanuel S. Quaye<br>Angie Urban                                   |
| Female Academic Leaders Fellowship: Assessing the Innovation and Impact   | Keratiloe S. Mogotsi<br>Lucy Khofi<br>Angie Urban                  |
| Hi-Tech Surfactants, India – Sustainable (ZED) Certification Dilemma: Go for Gold?                                    | Jane Gravill   |
| The Challenge of Corporate Purpose at Pacifico Seguros 2024   | Lucero Sanchez Julcapari<br>Alejandro Fontana<br>Guillermo Quiroga |
| IPASA: Motivating Philanthropy Funders to Adopt a Climate Lens  | Keratiloe S. Mogotsi<br>Stephanie Townsend                         |
| Sustainability Challenges: Bhoomika Vihar Enabling Women's Empowerment Through Tackling Gender Issues and Trafficking | Vijaya Zinnoury<br>Mamta Singh<br>Arayana Roy                      |
| All is Well, Yet, Why are People Leaving the NGO? Can Design Help Jatan Sansthan?                                     | Bindu Kulkarni<br>Renuka Kamath                                    |

## Strategy and Policy Cases

**Track Chair:** Erin Pleggenkuhle-Miles, University of Nebraska Omaha

**Co-Chairs:** Terry McGovern, University of Wisconsin - Parkside

### Table 1

**Session Chair:** Leif Lundmark, University of Nebraska Omaha

| <b>Cases</b>  | <b>Authors</b>   |
|---|--|
| APROFOR   | Javier Silva<br>Sebastian Guimaraens Sr.<br>Marcos Soto Sr.            |
| Market and Non-Market Strategies in a Highly Regulated Market | John Francis   |
| Right at Home: Navigating the Silver Tsunami in Senior Care   | Leif Lundmark<br>Kaleb Heckens<br>Erin Pleggenkuhle-Miles<br>Erin Bass |
| Pampas: Riding the Esports Wave                               | Enrique Chamas   |
| Nancy Whiteman and Wana Brands: Sell Out or Stay Independent? | Paul Seaborn   |
| Making No Little Plans for the Florida Aquarium               | Matthew Mullarkey<br>Kimberly Gratz                                    |

## **Table 2**

**Session Chair:** Terry McGovern, University of Wisconsin - Parkside

### **Cases**

Zudio: In Battle for India's Fashion Market

Pfizer Inc. – Strategizing for an Encore

Can Budweiser Tend Both its Business Goals and Promote its Social Agenda?

Accounting on the Rocks with a Twist of Technology

Growing our Future Childcare Co-operative

### **Authors**

Malay Krishna  
Anuvrat Anand

Raymond Paquin

Christopher Cassidy

Leigh Moon

Daphne Rixon  
Ashley Doyle  
Stephen Maclean

# NACRA 2024 PROGRAM COMMITTEE

Melanie Reed, Thompson Rivers University, Canada, Vice President Programs  
 Mike Annett, MacEwan University, Canada, Vice President-Elect Programs  
 Randall Harris, Texas A&M University, USA, Chair for John Seeger Start-Up Cases Workshop  
 Anne T. Lawrence, San Jose State University (emerita), USA, Chair of the Case Research  
 Foundation, Director of the Paul R. Lawrence Fellowship Program  
 NACRA Executive Board (see 2023-2024 NACRA Officers)

## Track Chairs and Co-Chairs

|   |   |
|---|---|
| <b>Accounting, Finance, and Economics</b>           | Anna Czegledi, Chair, Conestoga College<br>Jan Serrano, Co-Chair, Francis Marion University   |
| <b>Cases Written in Chinese Language</b>            | William X. Wei, Chair, Algoma University<br>Haibo Hu, Jiangxi University of Finance and Economics   |
| <b>Cases Written in French Language</b>             | Christine Kratz, Chair, ICN Business School<br>Sabrina Hombourger-Barès, Co-chair, École des Sciences de l'Administration Université TÉLUQ                                  |
| <b>Cases Written in Portuguese Language</b>         | Tania Casado, Chair, University of São Paulo<br>Erica Berte, Co-Chair, Metropolitan State University  |
| <b>Cases Written in Russian Language</b>            | Aigerim Raimzhanova, Chair, Narxoz University<br>Mariya Yesseleva-Pionka, Co-Chair, Suleyman Demirel University   |
| <b>Cases Written in Spanish Language</b>            | Josep Lluís Cano Giner, Chair, ESADE Business School, (Ramon Llull University)<br>Lorena A. Palacios Chacón, Co-Chair, Tecnológico de Monterrey                             |
| <b>Corporate Governance and Ethics</b>              | Vijaya Zinnoury, Chair, University of Denver<br>Theresa Coates, Co-Chair, Limestone College   |
| <b>Digital Technologies and Operations</b>          | Clinton Daniel, Chair, University of South Florida<br>G. Shankaranarayanan, Co-Chair, Babson College  |
| <b>Entrepreneurship, Family, and Small Business</b> | Sonia Mehrotra, Chair, S.P. Mandali's Prin. L. N. Welingkar Institute of Management Development and Research<br>Sarah Holtzen, Co-Chair, Missouri Southern State University |
| <b>Marketing</b>                                    | Silvia Cacho-Elizondo, Chair, IPADE Business School<br>Michael Goldman, Co-Chair, University of San Francisco   |
| <b>International Business</b>                       | Grishma Shah, Chair, Manhattan College  |

|   |  |
|---|--|
| <b>Organizational Behavior/<br/>Human Resource<br/>Management</b>             | Jyotsna Bhatnagar, Chair, Management Development Institute, Gurgaon (MDI-G)<br>Meredith Woodwark, Co-Chair, Wilfrid Laurier University |
| <b>Pedagogy: Developing Case<br/>Scholarship in Teaching and<br/>Research</b> | S. Bruce Thomson, Chair, MacEwan University<br>Shreya Mishra, Co-Chair, BIRLA Institute of Management Technology                       |
| <b>Social Impact and<br/>Sustainability</b>                                   | María Ballesteros-Sola, Chair, California State University Channel Islands   |
| <b>Strategy and Policy</b>  | Erin Pleggenkuhle-Miles, Chair, University of Nebraska at Omaha<br>Terry McGovern, Co-Chair, University of Wisconsin-Parkside          |

## 2023-2024 NACRA OFFICERS

### Board of Directors

| <b>Elected Officers</b>                        | <b>Executive Board</b>  |
|--|---|
| President                                      | Olga Kandinskaia, University of Limassol, Cyprus                |
| Immediate Past President                       | Nicole M. Amos, University of Massachusetts, Amherst, USA       |
| VP Programs                                    | Melanie Reed, Thompson Rivers University, Canada                |
| VP Programs-Elect                              | Mike Annett, MacEwan University, Canada                         |
| VP Case Marketing                              | Terry McGovern, University of Wisconsin, Parkside, USA          |
| VP Membership                                  | Kathryn Savage, Northern Arizona University, USA                |
| VP Communications                              | Atherine Lee, University of Technology, Jamaica                 |
|  |   |
| <b>Appointed Officers</b>                      |   |
| Treasurer                                      | Kathryn Savage, Northern Arizona University, USA                |
| Editor, <i>Case Research Journal</i>           | Eric Dolansky, Brock University, Canada                         |
|  |   |
| <b>Regional Directors</b>                      | <b>Additional Directors</b>                                     |
| Canada   | Meredith Woodwark, Wilfrid Laurier University, Canada           |
| Mexico (ALAC)                                  | Martha Moreno, Tecnológico de MoSonianterrey, Mexico            |
| East (CASE)                                    | William Naumes, University of New Hampshire (emeritus), USA     |
| Caribbean Case Researchers Association (CCRA)  | Paul Golding, University of Technology, Jamaica                 |
| International Case Research Association (ICRA) | William X. Wei, Algoma University, Canada                       |
| Southeast (SECRA)                              | Christopher Cassidy, Sam Houston State University, USA          |
| Society for Case Research (SCR)                | Andy Borchers, Lipscomb University, USA                         |
| Southwest (SWCRA)                              | Kendra Ingram, Southeastern Oklahoma State University, USA      |
| West (WCA)                                     | Julian Vogel, San Jose State University, USA                    |
| The Case Hub                                   | Randa Salamoun, American University of Beirut, Lebanon          |
|  |   |
| <b>Directors At Large</b>                      |   |
| Elected 2020, term expired 2023                | Vacant  |
| Elected 2021, term expires 2024                | Miriam F. Weismann, Florida International University, USA       |
| Elected 2022, term expires 2025                | Brooke Klassen, University of Saskatchewan, Canada              |
|  |   |
| <b>Advisory Board Representative</b>           | <b>(Elected by the Advisory Board of Past NACRA Presidents)</b> |
| Advisory Board Chair                           | Janis Gogan, Bentley University, USA (emerita)                  |



## PARTICIPANT INDEX

- Aggarwal, 15  
 Alam, 17  
 Almehdawe, 17  
 AlShami, 17, 20  
 Amos, 12, 15, 17, 39, 43  
 Anand, 16, 17, 36  
 Anderson, 43, 44  
 Andrews, 14, 28  
 Annett, 9, 10, 12, 15, 37, 39, 48  
 Anzola-Morales, 26  
 Aranda Sr., 21  
 Archibong, 43  
 Armstrong, 15  
 Asad, 19  
 Aten, 14  
 Attri, 17  
  
 Baird, 17  
 Balabanoff, 27  
 Ballesteros-Sola, 4, 7, 14, 33, 38  
 Barbosa, 23, 27  
 Barnes, 45  
 Barrera, 24  
 Barrett, 14  
 Bartholow, 20  
 Bass, 35  
 Berry, 29  
 Berte, 9, 15, 23, 37  
 Bertels, 14  
 Bhatnagar, 31, 38  
 Bibi, 19  
 Biswas, 16, 17, 18  
 Bizzell, 43, 44  
 Bogoviyeva, 30  
 Borchers, 39  
 Borghi, 23  
 Boroff, 14  
 Boulton, 43, 44  
 Bouthemy, 30  
 Bowen, 15, 18, 27  
 Boyle, 26  
 Brown, 43, 44  
 Browning, 32  
 Burger, 18  
 Butcher, 14  
 Butt, 30  
  
 Cacho-Elizondo, 29, 30, 37  
 Cahen, 15  
 Calatrava, 15, 30  
 Calvin, 32  
 Calvo, 15  
 Cano Giner, 7, 24, 37  
 Capeli, 18  
 Carayannopoulos, 14  
 Cárdenas, 24  
 Carey, 33  
 Carillo, 15  
 Carroll, 14  
 Carty, 31  
 Casado, 9, 22, 23, 37  
 Casanueva, 29, 30  
 Cassidy, 36  
 Cassidy, C, 4, 17, 39, 43  
 Castellanos, 30  
 Cawsey, 44  
 Cervellon, 33  
 Chacón, 24  
 Chamas, 35  
 Chatterjee, 20  
 Chaudhry, 27  
 Chauhan, 17  
 Cheng, 22  
 Chinn, 27  
 Choudhary, 30  
 Christensen, 45  
 Clark, 14  
 Clawson, 45  
 Close, 10  
 Coates, 7, 9, 20, 26, 37  
 Concha Sr., 21  
 Conn, 14  
 Contreras, 33  
 Corrêa, 18  
 Crouner, 43, 44  
 Czegledi, 7, 8, 17, 18, 20, 21, 37  
  
 Daniel, 11, 27, 37  
 Davila, 21  
 Davydenko, 21  
 DeFronzo, 16, 18  
 Deilami, 18  
 Demoss, 14  
 Devenin, 33  
  
 Diaz, 32  
 Divatia, 27  
 Dolansky, 7, 8, 10, 11, 12, 14, 17, 30, 39, 43  
 Doyle, 36  
 Dozier, 18  
 DuBois, 26  
  
 Eddy, 44  
 Edlund, 43  
 Efimova, 32  
 Eghbali-Zarch, 15  
 Eisenbeis, 43, 44  
 Ekhtari, 16, 18  
 Engelbert, 23, 27  
 Ernst, 21  
 Erskine, 45  
 Eshbach, 14  
 Etemad, 30  
 Ettington, 14, 43, 44  
  
 Farchi, 31  
 Fisher, 4, 7, 17, 26, 43  
 Fontana, 34  
 Franch, 14  
 Francis, 35  
  
 Gagnon, 25  
 Gallo, 23  
 Gamble, 14, 43  
 Garate, 21  
 Garcia, 18  
 Garcia Sr, 21  
 George, 27, 28  
 Gerard, 15  
 Geyfman, 18  
 Ghosh, 7, 20  
 Gilinsky, 14, 17, 33, 43, 44  
 Gill, 5, 11  
 Gill-Simmen, 18  
 Gogan, 4, 7, 12, 14, 17, 39, 43, 44  
 Golding, 15, 39  
 Goldman, 8, 14, 17, 29, 30, 37, 43  
 Gonçalves, 23  
 Gonçalves, 27  
 Gonzalez Rey, 15  
  
 Goulet, 14  
 Grandy, 14, 28  
 Grandzol, 18  
 Gratz, 35  
 Gravill, 8, 10, 15, 34  
 Guess, 12, 44  
 Guha, 16, 18  
 Guimaraens Sr., 35  
  
 Hallows, 21  
 Harris, 8, 11, 14, 37, 39, 43, 44  
 Hashemi, 29  
 Hawks, 18  
 Hay, 44  
 Heckens, 35  
 Heda, 25  
 Hennessey, 14  
 Hilterbrand, 15, 21  
 Holmes, 28  
 Holtzen, 15, 20, 28, 37  
 Hombourger-Barès, 25, 37  
 Horn, 31  
 Hsieh, 28  
 Hu, 22, 37  
 Hunger, 43, 44  
 Hussain, 29  
  
 Ingols, 14  
 Ingram, 39  
 Isabella, 14  
  
 Jaén, 7  
 Jagasia, 27  
 James, 32  
 Jha, 32  
 Jiang, 22  
 Johnson, 18, 26  
 Julcapari, 34  
 Julien, 31  
 Jung, 16, 18, 33  
  
 Kallakuri, 21  
 Kalnbach, 15  
 Kalro, 30  
 Kamath, 30, 34  
 Kandaswamy, 29  
 Kandinskaia, 7, 12, 20, 29, 39

*Kartik, 31*  
*Keels, 9*  
*Kent, 28*  
*Khara, 30*  
*Khofi, 34*  
*Khurshid, 14*  
*Kirkland, 32*  
*Klassen, 15, 26, 39*  
*Kratz, 25, 37*  
*Krishna, 36*  
*Krishnamurthy, 16, 18*  
*Kuekam, 25*  
*Kulkarni, 34*  
  
*Lambert, 15*  
*Latona, 45*  
*Lawrence, A, 4, 12, 14, 16, 17, 37, 43, 44, 45*  
*Lawrence, J, 14, 44*  
*Lawrence, P, 45*  
*Lease, 33*  
*Lee, 12, 18, 39, 43*  
*Lehmburg, 14*  
*Lester, 7, 8*  
*Levenburg, 14*  
*Levit, 18*  
*Lewis, 28*  
*Li, 18*  
*Librado-Gonzalez, 18*  
*Lin, 20, 28, 31*  
*Liu, 22*  
*Livingston, 14*  
*López, 18*  
*López Lubián, 14*  
*López-Jiménez, 26*  
*Lu, 22*  
*Lubian, 7*  
*Lundmark, 35*  
*Lunt, 19*  
  
*MacDonald, 14*  
*Maclean, 36*  
*Mahbubani, 15*  
*Mahmood, 27*  
*Majid Z, 19*  
*Mancha, 15*  
*Mathwick, 14*  
*Mazaheri, 15, 18*  
*McCullough, 14*  
*McDermott, 8, 30*  
*McGillis, 32*  
*McGlashan, 43, 44*  
  
*McGovern, 12, 14, 18, 35, 36, 38, 39*  
*McLean, 30*  
*McNair, 28*  
*Megginson, 43, 44*  
*Mehrotra, 18, 20, 28, 37*  
*Melo, 18*  
*Memar Zadeh, 15*  
*Meyskens, 15*  
*Miller, 17, 21, 44*  
*Mirza, 19*  
*Mishra, 20, 38*  
*Mogotsi, 34*  
*Moon, 36*  
*Moreno, 21, 39*  
*Morris, 17, 43, 44*  
*Mossman, 14*  
*Mularkey, 11, 26, 35*  
*Murimbika, 28*  
*Myrah, 14*  
  
*Naumes, M, 14, 44, 45*  
*Naumes, W, 14, 39, 43, 44, 45*  
*Nguyen, 15*  
*Nicholaas, 21*  
*Nie, 20, 31*  
  
*Oba, 27*  
*Ogata, 14*  
*Olalde, 18*  
*Olarewaju, 30*  
*Oliver, 31*  
*Onstott, 32*  
*Onyema, 18*  
*Osorio, 18, 24*  
*Ouboutaib, 25*  
  
*Pal, 18*  
*Palacios Chacón, 37*  
*Palan, 14*  
*Pannone, 28*  
*Papazian, 18*  
*Paquin, 36*  
*Parra, 14, 32*  
*Pleggenkuhle-Miles, 35, 38*  
*Porter, 45*  
*Pradhan, 19*  
*Prasad, 21*  
*Proudford, 32*  
  
*Qazi, 27*  
*Quaye, 34*  
*Quigg, 30*  
*Quinlan-Wilder, 14*  
*Quiroga, 34*  
*Quoquab, 15*  
  
*Rahman, 19*  
*Raible, 15, 34*  
*Raimzhanova, 11, 37*  
*Raman, 27*  
*Ramchandani, 15*  
*Ramirez Angulo, 24*  
*Ramirez-Angulo, 18*  
*Reed, Marlene, 14, 43, 44*  
*Reed, Melanie, 1, 4, 5, 10, 12, 37, 39*  
*Rice, 43*  
*Rixon, 36*  
*Roehl, 16, 19*  
*Rosenthal, 43, 44*  
*Rovar, 21*  
*Rovenpor, 15*  
*Rowe, 14, 28*  
*Roy, 15, 34*  
*Ruiters, 15*  
*Ruiz Paez, G, 33*  
*Ruiz Paez, M, 33*  
*Ryder, 14*  
  
*Sadeghi Shabestari, 19*  
*Salamoun, 39*  
*Salinas Solis, 24*  
*Samuels, 17*  
*Santos, 15*  
*Sarason, 33*  
*Savage, 12, 14, 39, 43, 44*  
*Schneper, 19*  
*Scott, 44*  
*Scoumis, 31*  
*Seaborn, 35*  
*Seeger, 43, 44, 45*  
*Serrano, 21, 37*  
*Shabestari, 16*  
*Shah, 14, 19, 29, 30, 37*  
*Shaheen, 32*  
*Shankaranarayanan, 27, 37*  
*Sharen, 14*  
*Sharma, 29, 30*  
  
*Shay, 14, 17, 43, 44*  
*Sherman, 15, 19*  
*Shields, 31*  
*Shigaki, 18*  
*Siddiqui, 8, 19*  
*Siew, 19*  
*Silva, 14, 17, 35, 43*  
*Singh, 19, 34*  
*Singleton, 43, 44*  
*Singular, 21*  
*Smith, 18*  
*Sord, 43, 44*  
*Soto Sr., 35*  
*Spee, 15*  
*Srivastava, 20, 32*  
*Srivastava, S, 32*  
*Stanford, 43, 44*  
*Stanko, 29*  
*Stebbins, 31*  
*Stephens, 43, 44*  
*Stewart, 33*  
*Stillman, 19*  
*Stuart, 27*  
*Subramanian, 8, 14, 17, 26*  
*Sullivan, 14*  
*Swayne, 14, 43, 44*  
  
*Taherizadeh, 30*  
*Tao, 16, 19*  
*Tate, 45*  
*Tate, Jr, 43, 44*  
*Tathibana, 14*  
*Taylor, Marilyn, 7, 9, 20, 43, 44, 45*  
*Thomas, 15, 17*  
*Thompson, A, 45*  
*Thomson, 4, 20, 31, 38*  
*Torres, 24*  
*Toson, 14*  
*Towl, 45*  
*Townsend, 34*  
*Tripathi, 18*  
*Trueblood, 44*  
  
*Ungureanu, 28*  
*Urban, 34*  
  
*Varghese, 16, 19*  
*Varlaro, 17, 43*  
*Vernis, 7, 33*  
*Vicaria, 24*  
*Vishwanatha S.R., 21*

Vogel, 39  
Walters, 27  
Wang, 20, 28, 31  
Warner, 19  
Watson, 43  
Wei, 22, 37, 39  
Weismann, 39  
Welsh, 43  
Wheelen, 43, 44  
White, 14, 21

Williamson, 21  
Winch, 15  
Wipawayangkool, 19  
Wood, 8  
Woodman, 10  
Woodwark, 8, 14, 17,  
31, 38, 39  
Wortman, 43  
Wright, 15

Xiao, 18  
Xu, 22  
Yefremian, 33  
Yegul, 15, 17, 19  
Yeo, 18  
Yesseleva-Pionka, 11,  
37  
Young, 15, 26  
Youssef, 18

Yung, 19  
Zahid, 19  
Zeba, 32  
Zhang, 22  
Zhou, 22  
Zhu, 32  
Zinnoury, 7, 9, 14, 17,  
21, 26, 34, 37, 43,  
44

## NACRA PAST PRESIDENTS

| Year | President                            | Institution  | Meeting Location                     |
|------|--------------------------------------|--|--------------------------------------|
| 2023 | Nicole Amos                          | University of Massachusetts, Amherst                         | San Antonio, TX                      |
| 2022 | John D. Varlaro                      | Johnson & Wales University                                   | Niagara Falls, Canada                |
| 2021 | Michael Goldman                      | University of San Francisco                                  | Online (planned for Orlando, FL)     |
| 2020 | Eric Dolansky<br>Javier J. O. Silva  | Brock University<br>IAE Business School                      | Online (planned for San Antonio, TX) |
| 2019 | Christopher M. Cassidy               | Sam Houston State University                                 | Tempe, AZ                            |
| 2018 | Kathryn S. Savage<br>Jeffrey P. Shay | Northern Arizona University<br>Washington and Lee University | Orlando, FL                          |
| 2017 | John E. Gamble                       | Texas A&M University, Corpus Christi                         | Chicago, IL                          |
| 2016 | Randall D. Harris                    | Texas A&M University, Corpus Christi                         | Las Vegas, NV                        |
| 2015 | Janis L. Gogan                       | Bentley University   | Orlando, FL                          |
| 2014 | Kathryn S. Savage                    | Northern Arizona University                                  | Austin, TX                           |
| 2013 | Vijaya Zinnoury                      | University of Denver   | Victoria, BC                         |
| 2012 | Jeffrey P. Shay                      | Washington and Lee University                                | Boston, MA                           |
| 2011 | Armand Gilinsky                      | Sonoma State University                                      | San Antonio, TX                      |
| 2010 | Marlene M. Reed                      | Baylor University  | Chaminade, CA                        |
| 2009 | James E. Fisher                      | Saint Louis University                                       | Durham, NH                           |
| 2008 | Michael F. Welsh                     | University of South Carolina                                 | Keystone, CO                         |
| 2007 | Deborah R. Ettington                 | Pennsylvania State University                                | San Diego, CA                        |
| 2006 | Rebecca J. Morris                    | University of Nebraska, Omaha                                | Cape Cod, MA                         |
| 2005 | Linda E. Swayne                      | University of North Carolina, Charlotte                      | Sedona, AZ                           |
| 2004 | *J. David Hunger                     | Iowa State University  | Tampa, FL                            |
| 2003 | Mary Anne Watson                     | University of Tampa  | Banff, Alberta                       |
| 2002 | Lew G. Brown                         | University of North Carolina, Greensboro                     | Nashville, TN                        |
| 2001 | Anne T. Lawrence                     | San Jose State University                                    | San Antonio, TX                      |
| 2000 | *John A. Seeger                      | Bentley University   | Santa Rosa, CA                       |
| 1999 | *Timothy W. Edlund                   | Morgan State University                                      | Durham, NH                           |
| 1998 | Chi Anyansi-Archibong                | North Carolina A & T State University                        | Cincinnati, OH                       |
| 1997 | William Naumes                       | University of New Hampshire                                  | New Orleans, LA                      |
| 1996 | H. Richard Eisenbeis                 | University of Southern Colorado                              | Atlanta, GA                          |
| 1995 | David W. Rosenthal                   | Miami University   |                                      |
| 1994 | *Robert P. Crouner                   | Eastern Michigan University                                  |                                      |
| 1993 | Robert McGlashan                     | University of Houston, Clear Lake                            |                                      |
| 1992 | Marilyn L. Taylor                    | University of Missouri, Kansas City                          |                                      |
| 1991 | *Timothy M. Singleton                | North Georgia College  |                                      |
| 1990 | *Raymond G. Stephens                 | Ohio University  |                                      |
| 1989 | *Robert L. Anderson                  | College of Charleston  |                                      |
| 1988 | *Melvin J. Stanford                  | Minnesota State University- Mankato                          |                                      |
| 1987 | *William R. Boulton                  | Auburn University  |                                      |
| 1986 | *Max S. Wortman                      | Iowa State University  |                                      |
| 1985 | *Bobby G. Bizzell                    | University of Houston, Downtown                              |                                      |
| 1984 | *Bill Rice                           | University of Houston, Clear Lake                            |                                      |
| 1983 | *Thomas L. Wheelen                   | University of South Florida                                  |                                      |
| 1982 | *Curtis E. Tate Jr..                 | University of Georgia  |                                      |
| 1981 | *Burnard Sord                        | University of Texas  |                                      |
| 1980 | *Leon Megginson                      | Mobile College   |                                      |

\*deceased

# NACRA FELLOWS

Per the Constitution of the North American Research Association:

*Those members of NACRA who have distinguished themselves through their life-long achievement in case research, writing, and teaching may be designated as a NACRA fellow. Individuals may be nominated by any member of NACRA. Selection of Fellows shall be made by a committee comprised of the President, the Immediate Past President, and the Chair of the Advisory Board. Members of the Advisory Board shall be polled for their comments concerning nominee qualifications, however, the final decision to designate a NACRA Fellow shall rest with the Selection Committee.*

## **NACRA is honored to recognize the following NACRA members selected as Fellows since 1990:**

Robert L. Anderson\*  
Bobby Bizzell \*  
William R. Boulton \*  
Lew G. Brown  
Tupper Cawsey \*  
Robert P. Crowner \*  
George G. Eddy \*  
H. Richard Eisenbeis  
Deborah R. Ettington  
Armand Gilinsky  
Janis L. Gogan  
A. Kay Guess  
Randall D. Harris  
Robert D. Hay \*  
J. David Hunger \*  
Anne T. Lawrence  
John J. Lawrence  
Robert McGlashan  
Leon Megginson \*  
Thomas R. Miller

Rebecca J. Morris  
Margaret J. Naumes  
William Naumes  
Marlene M. Reed  
David W. Rosenthal  
Kathryn S. Savage  
Charles R. Scott \*  
John A. Seeger \*  
Jeffrey P. Shay  
Timothy Singleton \*  
Burnard Sord \*  
Melvin J. Stanford \*  
Raymond G. Stephens \*  
Linda E. Swayne  
Curtis E. Tate, Jr. \*  
Marilyn L. Taylor  
Lyle Trueblood \*  
Thomas L. Wheelen \*  
Vijaya (Vi) Zinnoury

*\*deceased*

## **DISTINGUISHED CONTRIBUTORS**

Awarded to an individual who has contributed to case teaching, research, and publication over a sustained period of time. Individual does not need to be a NACRA member but must attend the conference in order to receive the award. It is not awarded every year.

Anne T. Lawrence (2018), San Jose State University

James G. Clawson (2014), Darden Graduate School, University of Virginia

William Naumes (2012), U. of New Hampshire, Past NACRA President, CRJ Editor and Fellow

Margaret J. Naumes (2012), U. of New Hampshire, NACRA Fellow

Marilyn L. Taylor (2009), University of Missouri-Kansas City, Past NACRA President and Fellow

Michael Porter (2005), Harvard University

John Seeger (2003), Bentley College, Past NACRA President, CRJ Editor and Fellow

Jim Erskine (2001 or 2002), Ivey Business School, Western Ontario

L.B. ("By") Barnes, Harvard Business School

Art Thompson (2000), University of Alabama

Paul R. Lawrence (1998), Harvard Business School

Joe Latona (1993), University of Akron and Ohio University, DSI

Curt Tate, (1992), Past President and NACRA Fellow

C. R. Christensen (1990), Harvard Business School

Andy Towl (1989), Harvard Business School

## NACRA 2024 AWARDS

| <b>NACRA 2024 Conference Awards*</b>        |   | <b>2024 Recipients</b><br>To be announced at<br>Saturday Awards<br>Breakfast |
|---|---|--|
| Best Conference Case (Gold, Silver, Bronze) | Awarded to top three cases presented at the NACRA 2024 conference.  |  |
| Best Student-Authored Case                  | Awarded to a case whose author (s) are students.  |  |
| Best Newcomer Case                          | Awarded to best case by author/s attending their first NACRA conference.  |  |
| Best Case in a Language Track               | Best case in language tracks (Chinese, French, Spanish, Portuguese, Russian).   |  |
| Best Ethics Case                            | Best case dealing with ethics, CSR, governance, or sustainability issues, in any track.   |  |
| Jonathan Welch Award                        | Best case for Accounting, Finance and Economics, this award commemorates distinguished service to NACRA by Jonathan Welch.  |  |
| Ruth Green Award                            | Best case for which all authors' primary affiliation is with institutions outside North America.  |  |
| NACRA Fellow                                | Those members of NACRA who have distinguished themselves through their life-long achievement in case research, writing, and teaching may be designated as a NACRA fellow.                               |  |
| NACRA Distinguished Contributor             | The NACRA Distinguished Contributor Award is awarded to an individual (not necessarily a NACRA member) who has contributed to case teaching, research, and publication over a sustained period of time. |  |
| <b>Case Research Journal Awards</b>         |   | To be announced at<br>Friday Luncheon  |
| Curtis E. Tate Jr. Award                    | Award for best case published in the CRJ in the award year (2023).  |  |
| Outstanding Editorial Board Reviewer        | Award based on quality of reviews, timeliness, and number of reviews by CRJ Editorial Board Members.  |  |
| Outstanding Ad Hoc Reviewer                 | Award based on quality of reviews, timeliness, and number of reviews for ad hoc reviewers.  |  |
| Outstanding New Reviewer                    | Award based on quality of reviews, timeliness, and number of reviews for a new CRJ reviewer.  |  |

*\* Not all awards are given each year, determined by the submissions to the conference and eligibility of authors and tracks.*

## 2025 CALL FOR CASES & PROPOSALS

North American Case Research Association (NACRA) 2025 Annual Conference  
Hyatt Regency Newport Beach, Newport Beach, California, October 16<sup>th</sup>-18<sup>th</sup>, 2025

---

- June 09, 2025 Submission deadline for Proposals for ‘New Views’ Panels, Workshops, and Symposia
- June 16, 2025 Submission deadline for Cases, Start-Up Cases, Pedagogy Track papers is 5pm EDT
- July 16, 2025 Decisions to authors; Conference early registration opens
- Sept. 15, 2025 Early regular registration deadline (additional conference fee applies after 5pm EDT)
- Sept. 23, 2025 Conference hotel rate cut-off date at 5pm EDT

The NACRA Annual Conference is a unique opportunity to engage with other leading case researchers in a small-group format, to receive detailed and constructive feedback about your case, and to participate in presentations from experienced case researchers and educators. Our distinctive roundtable track design provides an excellent professional opportunity to enhance your abilities to develop higher quality participant-centered and discussion-based cases, that would be suitable for publication in numerous refereed journals (such as NACRA’s *Case Research Journal*), case publishers and distributors, and textbooks. In addition, the Annual Conference includes a collaborative start-up workshop and ‘new views’ topic sessions. For more information on all tracks, sessions and submission guidelines, please see <http://www.nacra.net/conference>.

**Roundtable Tracks:** Most cases target typical business school courses and topics, such as finance, strategy, marketing, operations, governance, entrepreneurship, and organizational behavior. Cases that examine other contexts are also welcome if they facilitate participant-centered and discussion-based learning. Roundtable tracks will also be hosted for cases written in several languages. Undisguised decision-focused cases based on primary sources (interviews, field visits) are highly preferred. Although cases may be disguised, they *must* be based on real events and real people in real organizations. Fictional cases are not appropriate for this conference. Cases submitted to the conference may have been previously taught but must not have been previously published or accepted for publication elsewhere (journals, books, online) before the conference. A submission to the conference includes a case study and associated comprehensive instructor manual. In submitting your case, you are committing to having at least one author attend the NACRA conference and participate in case roundtables on the mornings of October 17<sup>th</sup> and October 18<sup>th</sup>. Furthermore, authors who submit multiple cases to different tracks must have a co-author who will also attend the conference.

**Start-Up Case Workshop:** In addition to the roundtable tracks, a workshop for less-developed cases will be hosted on October 16<sup>th</sup>. The workshop is appropriate for newer case authors wishing to learn how to develop effective teaching cases and instructor’s manuals, as well as experienced authors looking for advice on a new case approach. By submitting a two-page start-up case, you are committing to having at least one author attend the NACRA conference and participate in the start-up case workshop. Further, workshop authors are invited to participate in the roundtable tracks.

**Pedagogy Track:** Submit an article (from 3 up to 30 pages) exploring any aspects of learning and researching with cases to discuss opinions, research intentions, and articles in case research, case writing, and case teaching. Pedagogy track will be hosted on the afternoon of October 16<sup>th</sup>, in parallel with the Start-Up Case Workshop.

**New Views (Panels, Workshops, and Symposia):** A set of ‘new views’ topic sessions will be presented on the afternoon of October 17<sup>th</sup>. Proposals for ‘new views’ session are welcome, and should examine

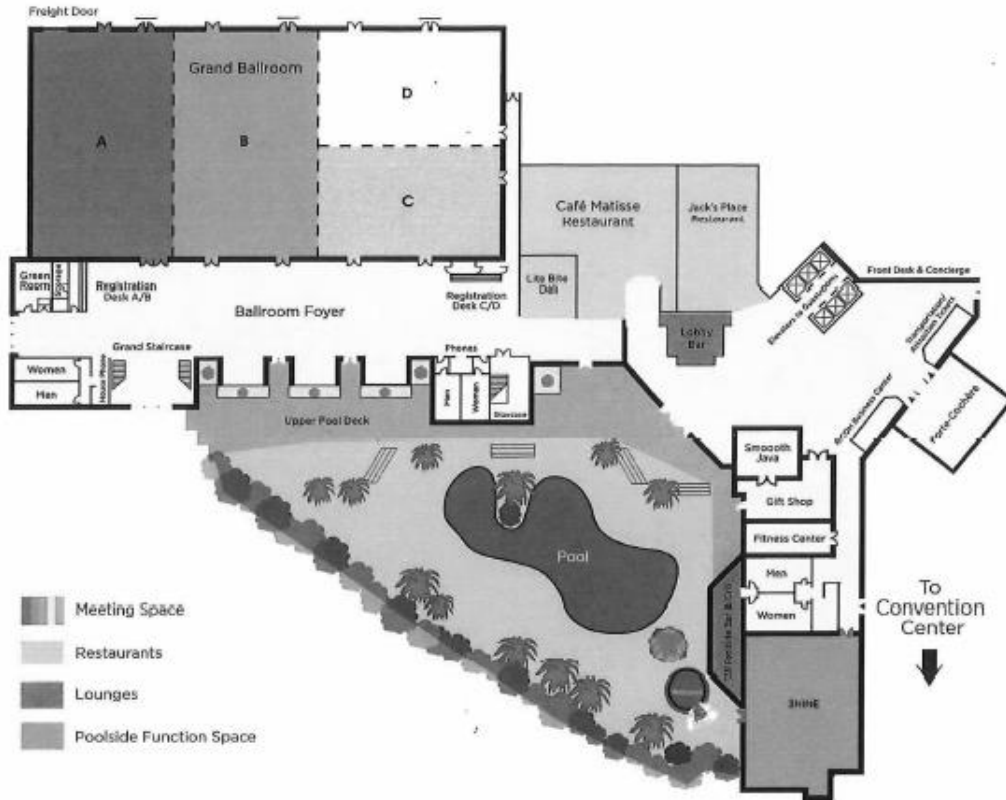


relevant, interesting, and novel case research or teaching topics. Previous sessions have included Teaching with Cases, Case Research for Theory Building and Testing, Interdisciplinary Cases, Multimedia Cases, Combining Case Method and Experiential Learning, Managing the Review Process, Case Journals Rankings, etc.

**Newport Beach, California:** The Hyatt Regency Newport Beach Hotel, our conference venue, is in the heart of Southern California and 15 minutes away from John Wayne Airport. Nestled amidst 26 acres of lush, tropical gardens this luxurious hotel offers a serene and inspiring environment. With its stunning views of the Back Bay and proximity to pristine beaches, the hotel combines the best of natural beauty and modern amenities, as well as the vibrant shopping, dining, and entertainment options of Newport Beach. For more details and photos please see <https://www.hyatt.com/hyatt-regency/en-US/newpo-hyatt-regency-newport-beach>

Mike Annett NACRA VP Programs 2025, MacEwan University, [Mike.Annett@macewan.ca](mailto:Mike.Annett@macewan.ca)

## LEVEL 1 - GROUND FLOOR



## LEVEL 2

