

SWCRA
SOUTHWEST CASE RESEARCH ASSOCIATION

ANNUAL CONFERENCE
PROCEEDINGS

ALBUQUERQUE, NEW MEXICO
March 7-10, 2018

Editor
Irfan Ahmed
Sam Houston State University

Contents

History of the Southwest Case Research Association (SWCRA).....	3
History of The Journal of Applied Case Research.....	4
SWCRA Past Presidents.....	5
Southwest Case Research Association Officers, 2017-18	6
2018 Conference Track Chairs	7
2018 Conference Program	8
Case Synopses	12
The “Amazon Way” or No Way: A Case Study On Strong Cultures Versus Cults.....	13
Pakistan Super League (PSL): Marketing and Growth Strategies in T20 Cricket.....	14
Joel Manby, SeaWorld, and the Blackfish Controversy	15
Managing Complex Global Projects and Technology Marvels: From Hubble to James Webb	16
Walmart’s Failures in Entering three Developed Markets: Institutionalized Misunderstanding	17
Marketing Coca-Cola in Honduras: Corporate Social Responsibility Issues.....	18
You Made It: Now You Are A Manager	19
Dickinson State University Foundation: For Students or For Profits?	20
Permission to Use SWCRA Cases.....	21

History of the Southwest Case Research Association (SWCRA)

The origin of the Southwest Case Research Association was due to the efforts of the members of the North American Case Research Association (NACRA) to sponsor workshops at the annual meeting of the Southwest Federation of Academic Disciplines as a service to SWFAD members. In March 1991, Tim Singleton, past president of NACRA challenged case researchers to do something "different" to reenergize the NACRA involvement at SWFAD. The challenge was answered by a few dedicated people who formed SWCRA during the subsequent year. Supported by NACRA, the association held its first formal meeting in San Antonio in March, 1992 when it published its first volume of proceedings.

The first president at that meeting was Robert McClashan of the University of Houston, Clear Lake. Carl Ruthstrom served as program chair and as the first editor of the Association's journal, the *Journal of Applied Case Research*. While the initial participants numbered 79, 84 charter members were identified with numbers 01-84.

The first full slate of officers was elected at the 1992 meeting: Carl Ruthstrom, President; Walt Green, 1993 Program Chair; Secretary and Historian Michael Menefee; and Robert Carter, Treasurer. The Association wrote and enacted a Constitution and By-Laws. These were updated significantly at the 2003 Meeting in Houston and have been amended periodically.

History of The Journal of Applied Case Research

The Journal of Applied Case Research was formed by SWCRA to publish cases and papers dealing with issues in all business-related disciplines that involve case writing, research, and teaching. At the time the Journal originally started, there were few publication outlets for cases. However, now there are several case journals, and many article-oriented journals will carry cases on a regular basis.

The Journal focuses on real world cases based on field research or research from secondary sources. Fictitious cases are not considered for publication. An instructor's manual must accompany each case to facilitate classroom use.

Dan Jennings of Texas A&M University succeeded Carl Ruthstrom as Proceedings and Journal Editor in 1997 and held those positions until 2000 when Leslie Toombs, University of Texas -- Tyler, became Editor. Alex Sharland of Barry University was appointed Editor in March 2002. Steve Maranville became Editor in 2007 and served for just over two years. The Journal was edited by Alex Sharland for one year (2009-2010) on an interim basis. At the 2010 meeting, Joe Kavanaugh was appointed to fill a three-year term as Vice President, Publications and Journal editor. At the 2014 meeting, Irfan Ahmed was appointed to a three year term as Vice President, Publications and Journal editor

During Steve Maranville's tenure the Journal of Applied Case Research became a fully digital and online outlet for case research. The online parts of the organization are coordinated by Gerald Kohers at Sam Houston State University.

The editor is actively seeking new cases for acceptance into the next edition. Please consider the Journal for your manuscripts and spread the word. We are open for business and welcome your work.

Journal of Applied Case Research
Editor – Irfan Ahmed, Sam Houston State University
irfanahmed@shsu.edu
936-294-1276

SWCRA Past Presidents

1992-1993	Carl Ruthstrom
1993-1994	Walt Green
1994-1995	Michael Menefee
1995-1996	Doug Grider
1996-1997	Daniel Jennings
1997-1998	Stanley Phillips
1998-1999	Leslie Toombs
1999-2000	Patricia Feltes
2000-2001	Marlene Reed
2001-2002	Wilke English
2002-2003	Carol Cumber
2003-2004	Kay Guess
2004-2005	Steve Maranville
2005-2006	Hank Maddux
2006-2007	Carol Cumber
2007-2008	Joe Kavanaugh
2008-2009	Alex Sharland
2009-2010	Steve Vitucci
2010-2011	Don Mosley, Jr.
2011-2012	Rodney Vandever
2012-2013	Jeffrey Miller
2013-2014	Irfan Ahmed
2014-2015	Simon Medcalfe
2015-2016	Robert Stevens
2016-2017	Timothy D. Wise

Southwest Case Research Association Officers, 2017-18

President	Timothy D. Wise , Southern Arkansas University
President Elect	Martin Bressler , Southeastern Oklahoma State University
Vice President, Programs	Courtney Kernek , Southeastern Oklahoma State University
Secretary	Robert Howard , Southeastern Oklahoma State University
Treasurer	Julia Kwok , Northeastern Oklahoma State University
Vice President, Technology	Gerald Kohers , Sam Houston State University
Vice President, Publications (Proceedings Editor)	Irfan Ahmed , Sam Houston State University
Historian and Archivist	Daniel F. Jennings , Texas A&M University – College Station
Immediate Past President	Lawrence Silver , Southeastern Oklahoma State University

2018 Conference Track Chairs

Accounting/Finance/Economics
University

Julia Kwok, Northeastern Oklahoma State

Brian Walkup, University of Tulsa

**Human Resource Management/
Organizational Behavior**

Timothy D. Wise, Southern Arkansas University

International Business

Syed Tariq Anwar, West Texas A&M University

Non-Profit Management/Ethics

Robert Howard, Southeastern Oklahoma State
University

Marketing

Amanda Evert, Southwestern Oklahoma State
University

Small Business/Entrepreneurship

Martin Bressler, Southeastern Oklahoma State
University

Strategic Management/ Business Policy

Robert Stevens, Southeastern Oklahoma State
University

Student Track

Lawrence Silver, Southeastern Oklahoma State
University

2018 Conference Program

March 8, 2018 (Thursday)

7:30 a.m. – 8:00 a.m.

Tesuque

BREAKFAST HONORING PAST PRESIDENTS
All SWCRA Members invited.

8:00 a.m. – 9:00 a.m.

Tesuque

FBD/SWCRA Choice Pick Session

SESSION A

Special Guest Speaker

Richard Rice, Treasurer of Albuquerque Balloon Fiesta, Inc.
The History of the Balloon Fiesta

9:00 a.m. – 12:00 p.m.

Tesuque

SESSION B Accounting and Finance Track

Session Chairs: **Julia Kwok**, Northeastern State University
Brian Walkup, University of Tulsa

Corporate Finance Courses and Public Policy: Teaching the Close Connection - A Critical Incident

Mary H. Kelly, Texas A&M University - Central Texas

Investing in Tax-Free versus Taxable Bonds

Halil D. Kaya, Northeastern State University

Julia Kwok, Northeastern State University

Fitness Fanatics, LLC

Rhonda J. Richards, Southeastern Oklahoma State University

A Downtown Stadium for the Augusta GreenJackets Baseball Team (B

Simon Medcalfe, Augusta University

Salinla Tulyasatien, Augusta University

Nick Zivkovic, Credit Suisse Securities USA

SESSION C Marketing Track / Small Business and Entrepreneurship Track / Student Track

Session Chairs:

Amanda Evert, Southwestern Oklahoma State University
Martin Bressler, Southeastern Oklahoma State University
Lawrence Silver, Southeastern Oklahoma State University

The Birthday Gift

Yulia Fedko, MBA, University of South Alabama
Alex Sharland, University of South Alabama

Matt's Ziebart Tidy Car

Martin Bressler, Southeastern Oklahoma State University

Mears Power-T, Inc.

Robert E. Stevens, Southeastern Oklahoma State University
Lawrence Silver, Southeastern Oklahoma State University
Martin Bressler, Southeastern Oklahoma State University
Courtney Kernek, Southeastern Oklahoma State University
David Loudon, Samford University

Z's Bees

Russell (Rusty) Calk, Texas A&M University - Central
Angela Patrick, Texas A&M University - Central

Ducky's Donuts

Martin Bressler, Southeastern Oklahoma State University

SESSION D Strategic Management Track

Session Chair: **Robert E. Stevens**, Southeastern Oklahoma State University

Orchids Paper Company 2014-2015

John K. Masters, Cameron University
Pamela Rogers, Stephen F. Austin State University

Amazon Whole Foods: When E-Commerce Met Brick-and-Mortar and Saved the Brand of Conscientious Capitalism

Keith Register, MBA, University of Texas - Tyler
Shane Martin, MBA, University of Texas - Tyler
Chad Nixon, MBA, University of Texas - Tyler
Brittany Senior, MBA, University of Texas - Tyler
Roger N. Conaway, University of Texas - Tyler

Pakistan Super League (PSL): Marketing and Growth Strategies in T20 Cricket
Syed Tariq Anwar, West Texas A&M University

Joel Manby, SeaWorld, and the Blackfish Controversy
Timothy D. Wise, Southern Arkansas University

Grayson Christian School: Selective Growth Strategy
Robert E. Stevens, Southeastern Oklahoma State University
Lawrence Silver, Southeastern Oklahoma State University
Martin Bressler, Southeastern Oklahoma State University
Courtney Kernek, Southeastern Oklahoma State University
David Loudon, Samford University

SESSION E International Business Track

Session Chairs: **Syed Tariq Anwar**, West Texas A&M University

*Managing Complex Global Projects and Technology Marvels:
From Hubble to James Webb*
Syed Tariq Anwar - West Texas A&M University

*Walmart's Failures in Entering Three Developed Markets: Institutionalized
Misunderstanding*
F. Robert Buchanan, Indiana University of Pennsylvania
Hussam Al-Shammari, Indiana University of Pennsylvania

Marketing Coca-Cola in Honduras: Corporate Social Responsibility Issues
Mary Anne Doty, Texas A&M University - Commerce

SESSION F Organizational Behavior and Human Resource Management Track / Non- Profit Management/Ethics Track

Session Chairs: **Timothy D. Wise**, Southern Arkansas University
Robert Howard, Southeastern Oklahoma State University

The "Amazon" Way or No Way: A Case Study on Strong Cultures versus Cults
Brian Matthews, Texas A&M University - Texarkana
Jamie Daigle, Texas A&M University - Texarkana; University of Liverpool
James Harbin, Texas A&M University - Texarkana

You Made It: You Are Now a Manager
Joseph Kavanaugh, Sam Houston State University
Chandra Kill, Kress Employment Screening

Dickinson State University Foundation: For Students or For Profit?
Mindy Henderson, MBA Student
Thomas D. Tolleson, Texas Wesleyan University

12:00 p.m. – 1:30 p.m.

Tesuque

NETWORKING LUNCHEON
All SWCRA Members invited

SESSION G **Special Guest Speaker**
Anderson-Abruzzo International Balloon Museum Foundation

1:30 p.m. – 3:00 p.m.

Tesuque

SESSION H Case Writing Workshop 101

The Beginners Guide to Writing and Publishing Cases
Presenter: Leslie A. Toombs, Texas A&M University - Commerce

Whether you're looking to implement cases in your courses, write cases for the classroom or for publication this workshop provides critical elements of the case method to help you get started. This hour-long workshop will cover topics including: an introduction to the types of cases, the "anatomy" of a case, how to prepare for writing a case, the teaching note, and getting your case published (how and where). If you missed Case Writing 101, or just want to improve your case writing this workshop is a must! The final 30 minutes will be an open Q&A session.

3:30 p.m. – 5:00 p.m.

Tesuque

SESSION I Business Meeting & 2019 Program Planning

Meeting Session Chair: Martin Bressler, Southeastern Oklahoma
State University

All SWCRA members are invited to attend this business meeting. Attend and help prepare for our 2019 program. Anyone interested in being a track chair, reviewer, discussant, etc. are encouraged to attend and share ideas to grow and further the art of case writing.

Case Synopses

THE “AMAZON WAY” OR NO WAY: A CASE STUDY ON STRONG CULTURES VERSUS CULTS

Brian Matthews, Texas A&M University Texarkana
Jamie Daigle, Texas A&M University Texarkana
James Harbin, Texas A&M University Texarkana

Courses Objectives and Use

This case study is intended for use in undergraduate- and graduate-level Management and Ethics courses. After analyzing this case study, students will be asked to articulate the main concepts (e.g., strong culture and cults) when analyzing this case study, list implications pertaining to the effect of a strong culture within a hypercompetitive industry, determine how the acceptability of cultural norms contributes to the success of Amazon and Whole Foods, respectively and collectively; list possible advantages and disadvantages of combining two divergent cultures and summarize managerial steps to mitigate turbulence, evaluate the ethical legitimacy of its Amazon’s approach to corporate culture, and examine the impact on sustainability if Amazon adopted a paradigm contrary to its existing cultural model.

Case Synopsis

This case study analyzes Amazon’s highly criticized culture and its legitimacy in a hypercompetitive organizational construct. An article published by the New York Time illuminates current and former employees’ disapproving perceptions of the culture Amazon has adopted which has ironically contributed to its overwhelming success. Although some have touted their allegiance to such cultural pragmatism, others, who define the culture as “modern-day Darwinism”, have experienced consternation as cultural practices have created unpleasant work conditions thus causing dissatisfaction that lead to voluntary or involuntary exiting. In light of Amazon’s purchase of Whole Foods, questions have resonated regarding the dichotomous collision of cultural disparities that could have either have fortuitous or catastrophic implications. Co-Founder and CEO, Jeff Bezos, had adamantly defended Amazon amidst such allegations of mistreatment of employees and refute claims of rejecting underperforming employees and granting reprieves for those only conforming to the cultural model. However, Bezos refutes that the company’s cultures embodies the industry’s standards and defines its hypercompetitive and aggressive nature as distinctive and incomparable to other companies.

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PAKISTAN SUPER LEAGUE (PSL): MARKETING AND GROWTH STRATEGIES IN T20 CRICKET

Syed Tariq Anwar, West Texas A&M University

Case Objectives and Use

The main purpose of this case is to discuss and analyze the PSL which was started by the Pakistan Cricket Board (PCB) in 2015 with a big party and publicity. By being a new cricket entity, the PSL went through two successful seasons and made a good start although there were a few hurdles in the launching of the league. The case analyzes the prospects of PSL and its marketing and growth strategies in T20 cricket. The case is appropriate for use in graduate and senior undergraduate marketing and strategic management courses.

Case Synopsis

Cricket is the second popular sport in the global sports industry which includes a multitude of recreational games and sports. No wonder cricket is a big sport and continues to grow in global markets. The International Cricket Council (ICC) is the governing body of the sport and operates out of Dubai, UAE. There are many leagues in the UK, South Asia, the Caribbean, Australia, and the U.S. Pakistan never had a recognized cricket league since its independence. Because of a large consumer base and growth potential, the PSL was started with a well-planned strategy in 2015. The league was the result of die-hard cricket fans in Pakistan. At the same time, because of terrorism and security risks, the PSL's matches were held in Sharjah and Dubai because of South Asian expatriates. Today's market conditions and growth strategies look favorable for the PSL in Pakistan and the UAE. It is expected that the league will be a force to be reckoned with in Pakistan and in its regional markets regarding attracting well known international players. In addition sponsorships from MNCs are available to help the PSL. Also cable TV networks are willing to increase their support because of Pakistan's younger consumers and captive audiences. Pakistan's fast changing demographics are particularly in favor of the league and will be major factor regarding building new facilities and stadiums. Within these perspectives and growth strategies, the PSL case is intended to have students look at this growing league and its current and future prospects in T20 cricket in South Asia and the Middle East.

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JOEL MANBY, SEAWORLD, AND THE BLACKFISH CONTROVERSY

Timothy D. Wise, Southern Arkansas University

Case Objectives and Use

This case is appropriate for use in undergraduate strategic management, marketing courses, and ethics courses. As a strategic management case, it provides an exercise in the application of such common analytical devices as five-forces analysis, SWOT analysis, and ratio analysis. The challenges faced by the CEO, however, forced him to rethink the company's mission statement and to take steps to reposition the company in light of public sentiment. The objectives are given as follows: Students will summarize and evaluate the steps taken by SeaWorld's executive officers in responding to the incident, conduct a SWOT analysis of SeaWorld Parks and Entertainment to determine what strengths the company could build on, what weaknesses it needs to address, and what opportunities it could pursue; conduct a five-forces analysis of the theme park industry to determine the company's position among competitors, and discuss alternatives for dealing with an image-damaging incident like the one faced by SeaWorld Entertainment.

Case Synopsis

When Joel Manby assumed the CEO position at SeaWorld Entertainment, he had his work cut out for him. The 2010 death of a SeaWorld employee led to the production of a 2013 documentary, *Blackfish*, that blamed the incident on SeaWorld's treatment of captive killer whales. The release of the documentary and its repeated airings on CNN made SeaWorld a target for animal rights activist groups, especially in California where SeaWorld had originated, and hurt the company's reputation with the public. Though SeaWorld had taken steps to address many of the problems, the damage to the company's reputation was serious. When the company continued to lose revenues, CEO Jim Atchison resigned. Joel Manby, who had spent the past 12 years as the CEO of Herschend Family Entertainment, assumed the CEO's position in 2015. His task was to restore the company's image in the eyes of the public, but it was not an easy task. He had to deal with perceptions and well as reality and to manage a whole portfolio of companies that included other brands like Busch Gardens.

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MANAGING COMPLEX GLOBAL PROJECTS AND TECHNOLOGY MARVELS: FROM HUBBLE TO JAMES WEBB

Syed Tariq Anwar, West Texas A&M University

Case Objectives and Use

The purpose of this illustrated case is to analyze and discuss large-scale complex global projects (megaprojects) and technology marvels which cost billions of dollars and massive resources. Complex projects such as Hubble Space Telescope (hereafter Hubble) and James Webb Space Telescope (hereafter James Webb) truly epitomize their intricate development and operational complexities. This case analyzes and discusses Hubble and James Webb and their place in global complex projects. The case is appropriate for use in graduate and senior undergraduate international business strategy and strategic management courses.

Case Synopsis

Complex global projects have become important because of their long-term benefits, spill-over effects, and value added in science and technology. Initiating, developing and managing complex global projects is a difficult and time consuming task. The National Aeronautics and Space Administration (NASA), the European Space Agency (ESA) and other space agencies collaborated in the development and launching of Hubble and James Webb. Because of the complexities of both projects, this cooperation was necessary to operationalize these projects from their inception.

Finished in 1985, Hubble's cost surpassed \$1.2 billion and was put on the Shuttle Discovery in 1990 which deployed it into its orbit on June 24. As of 2017, James Webb is going through its rigorous tests and scientific experiments. The telescope will be launched after March 2019. James Webb's cost amounted to over \$10 billion. In the scientific community, both telescopes are technology marvels and truly epitomize their complexities and operational issues. At the same time, complex global projects often witness operational delays, cost overruns, quality mishaps, staffing problems, etc. Within these domains and perspectives, the Hubble-James Webb case is intended to have students look at today's complex global projects, The case uses Hubble and James Webb as the main benchmark regarding analyzing complex global projects. Both telescopes remain technology marvels and major breakthroughs regarding their complex and cutting-edge technologies, operational issues, and cross-border collaborations and alliances.

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WALMART'S FAILURES IN ENTERING THREE DEVELOPED MARKETS: INSTITUTIONALIZED MISUNDERSTANDING

F. Robert Buchanan, Indiana University of Pennsylvania
Hussam Al-Shammari, Indiana University of Pennsylvania

Case Objectives and Use

The purpose of this case is to observe how overly simplistic theoretical modeling assumptions from New Institutional Theory might be applied by managers, creating a retrospective of perplexing business failures that were not foreseen. We might ultimately say how NOT to enter a market.

In combining a conceptualization of Institutional Theory with the National Business Systems approach, we arrive at a sociological observation of Cultural Distance as an informative analytical element of the market entry process. This study examines strategies related to Walmart's international expansion initially into Germany, Japan, and South Korea. We believe that the marketing mix – product, place, price, and promotion are informative aspects of international market differentiation that can be critically and comparatively evaluated.

Related topics of discussion: market entry, market entry failure, culture clash, application and explanation of institutional theory, new institutionalism theory, national business systems theory, and cultural distance.

Case Synopsis

Walmart continues to be the largest retailer in the world. The company receives nearly one third of its overall sales from international operations. Three market entry fiascos from Walmart's aggressive international expansion years are analyzed in this case. Interestingly, these failures took place in developed market countries; Germany, South Korea, and Japan. They represent enormous levels of financial loss, as well as stunning setbacks to international expansion for the firm. Even though these failures happened some years ago they still resonate because the retail giant rarely loses in their market entry campaigns.

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MARKETING COCA-COLA IN HONDURAS: CORPORATE SOCIAL RESPONSIBILITY ISSUES

Mary Anne Doty, Texas A&M University – Commerce

Case Objectives and Use

The case is written for undergraduate students to apply concepts from international marketing, consumer behavior, or corporate social responsibility and ethics. From an international marketing or consumer behavior perspective, students will identify global environmental issues, particularly demographic information and cultural norms to understand the situation. From a CSR/ethics perspective, students identify stakeholders and evaluate Coca-Cola's responsibilities for selling in an impoverished market. Finally, students will evaluate alternatives and justify a decision for the firm.

The case has also been used for assessing Global student learning outcomes for program evaluation (Assurance of Learning) goals. For this task, a sample rubric is provided in the instructor's manual, to aid in measuring student achievement.

Case Synopsis

Coca-Cola is a global company that has successfully penetrated consumer markets in Honduras, even in the most remote rural villages. The case is written from the perspective of American visitors, who react to unintended consequences of the soft drink's success. People who can barely afford food are drinking Coca-Cola and competing drinks because they are cheap, easily available and uncontaminated (unlike the local water). Unfortunately, the high sugar content contributes to tooth decay and tooth loss, as well as increasing rates of diabetes.

The case highlights environmental differences between doing business in the US and Honduras. It focuses on corporate social responsibilities of firms operating in impoverished countries. Students will apply an understanding of environmental and cultural factors in another country as they evaluate several alternatives that Coca-Cola might consider.

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YOU MADE IT: NOW YOU ARE A MANAGER

Joseph Kavanaugh, Sam Houston State University
Chandra Kill, Kress Employment Screening

Case Objectives and Use

This case illustrates the issues that arise in the most challenging transition in management, from technical employee to first-line supervisor. As a critical incident, this seeks to fulfill two key objectives: 1) to illustrate the challenges of promotion from technical employee to first-line supervisor, especially in one's own work unit; and 2) foster critical thinking in analyzing a complex management decision that has many different solutions. This case has broad utility in many introductory courses in management, but is most apt in a course in principles of management, introduction to human resources management, or training programs that focus on first-line supervision.

Case Synopsis

Chandra Kill is the owner and CEO of Kress Employment Screening, Houston, TX, a \$1.5 million, privately-held employment screening firm with an array of local and national client firms. With her 11 employees, they compete successfully against major national background screening firms by differentiating their service quality based on value, speed, accuracy, and personalized customer service. It is a "boutique" shop with a very informal team-based culture, and a structure of team-based and personal rewards that strongly reinforces its core values of customer responsiveness, accuracy, and speed in production. Collaboration, mutual support, continuous learning, and respect for the contributions of your colleagues are key to meeting demanding production goals.

A recent resignation has left open the position of Operations Director. Ryan, a four-year employee with experience in both research groups of the firm (education/employment verification and civil/criminal records) was given a probationary promotion to the position in September, 2016. Kill had some reservations about Ryan, so she designed a ten-part training program he must successfully complete before his promotion is finalized. Kill's decision to offer the position to Ryan was based largely on his peer evaluations and his leadership in training others. In fact, his colleagues were the ones who first suggested to Kill that he be promoted.

Problems began to surface soon after the probationary promotion. A different Ryan emerged as he began to assume additional responsibility. He assumed authority that had not been vested in him in his probationary period, and increasingly had confrontations with his teammates. Many of these issues were grounded in his poor personal communications skills and increasing need for control. Now, Kill must make a decision, but short of terminating Ryan, she is not sure what to do. She highly values his contributions to production and training but, oh, the drama.

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DICKINSON STATE UNIVERSITY FOUNDATION: FOR STUDENTS OR FOR PROFITS?

Mindy Henderson, Texas Wesleyan University
Thomas Tolleson, Texas Wesleyan University

Case Objectives and Use

This is a decision based case. It is suitable for upper-division undergraduate, graduate students enrolled in courses that examine ethical behavior of managers and/or the social responsibilities of a business, specifically not-for-profits.

In analyzing the case, students will identify the ethical responsibilities for an individual in a management position, discuss and distinguish character traits that define integrity, and develop the ability to identify ethical dilemmas in which following the letter of the law bypasses the principle.

Case Synopsis

With over 17 years of leadership, Kevin Thompson, CEO of the Dickinson State University Foundation (DSUF) seemed to be leading the organization in a direction slated for success. Concerns and questions began to arise when the DSUF scholarship expenditures started to decline but involvement in university and community infrastructure projects increased. As time passed, apprehension did not. An auditing firm unable to issue an opinion clarified the seriousness of the situation. Donor funds were not properly accounted for and were used as collateral for debt incurred and to cover operating deficits. When all the evidence was exposed, the donors and students were left with nothing.

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