



2023 Call for Cases

The 2023 Southwest Case Research Association (SWCRA) meeting will be held in association with the Federation of Business Disciplines (FBD) conference in Houston, Texas at the Hyatt Regency Hotel on March 8-11, 2023.

The SWCRA meeting begins on Thursday morning, March 9, 2023. The special guest speakers and symposia may address case development, case reviewing, case teaching, publication, and related issues. A popular format in recent years has featured live presentations by relevant company officials, and their thinking about critical decision issues. This open format has provided for questions and input from the audience. Roundtable case sessions, providing multiple reviews and feedback to authors, will take place on Thursday morning, March 9th. The program will conclude Thursday afternoon with a planning session to discuss the program for 2024. Our Thursday schedule is convenient for FBD participants who want to make the most of their travel funds by participating in other organizations as well.

Instructions

SWCRA encourages the submission of teaching cases for the roundtable case sessions planned for Thursday, March 9th. Submitted cases must not have been presented or published previously or accepted for presentation or publication elsewhere. Accepted cases will be considered for the Best Case Award, and outstanding cases will be considered for publication in the *Journal of Applied Case Research*, a SWCRA publication. The deadline for receipt of all submissions is **October 1, 2022**. Each submission must have a title page with the name, affiliation, address, phone number, FAX number and email address of all authors, with the primary author (contact person) indicated. The main body of the submission must have a title only. All submissions will be double blind reviewed. The symposia may address case development, case reviewing, case teaching, publication, and related issues. Related research papers may be presented only in conjunction with the symposia.

Cases

Teaching cases related to the tracks listed in this call are welcomed. Cases should be typed, double-spaced, and no longer than 30 pages. Each case must be accompanied by an instructor's manual, which should include the following:

- ✓ Case Overview Analysis
- ✓ Objectives
- ✓ Courses and Levels Epilogue (if appropriate)
- ✓ Discussion Questions
- ✓ Answers to the Discussion Questions
- ✓ References (if needed)

Cases are to be based on actual organizational data, either from primary or secondary sources. Cases that are not based on factual situations and organizations, but were written as specific teaching tools, will also be considered, but will not be eligible for the Best Case Award or for publication in the *Journal of Applied Case Research*.*

***Each case will be double blind reviewed and the author(s) who revise the cases/teaching notes according to the instructions of the reviewers, will have their case published in the Journal which will count as a peer reviewed journal publication for promotion/tenure considerations.**

Please specify the type of the case when submitting:

Decision cases. Decision cases are distinguished by ending at a decision point. Usually this is a decision facing the central character in the case, the decision-maker. A strong opening paragraph, often referred to as “the hook,” should telegraph the decision scenario faced by the decision maker. No introductory paragraph is needed. Most often, decision cases are based on primary field research and are enriched by real characters and quotations, where appropriate. Beyond these basic conventions, the format of a decision case may vary based on the discipline, subject matter, and situation.

Descriptive cases. Descriptive cases are used to illustrate a broad scenario for organizational analysis. These cases must be based on real events and organizations but generally utilize secondary research where direct access to the organization is not available or may not be required. They are usually quite extensive and may blanket a broader timeframe than normally encompassed in a decision case. For example, a decision case might examine a CEO decision at SAP, while a descriptive case might explore the evolution of the ERP software industry from 1990 to 2010.

Critical incidents. Critical incidents are also decision-focused, so they should open with a hook and end at the decision point. The distinguishing features here are focus and length. Critical incidents are five pages or less, tightly focused on a very specific situation or decision, and intended to illustrate a singular teaching point. They are also real events, organizations, and characters.

Student Cases. We also provide students (both graduates and undergraduates) with an opportunity to prepare cases for the conference. The student cases must be in the required format and submitted to the appropriate track for review. The best student case will be awarded \$500 to be divided among the co-authors of the case. The following stipulations apply:

1. The case must be accepted in the appropriate track.
2. There can be no more than four co-authors
3. The case must have a faculty sponsor, but the sponsor cannot do significant work on the case.
4. At least one student and the faculty sponsor must register for the conference and be present to present the case at the conference.
5. The accepted student cases will be submitted to a judging panel made up of the Board of Directors of the Association to select the best case.

Submit a copy of each case and accompanying instructor's manual (teaching notes) electronically to the appropriate **Track Chair** (listed below). Each case submission should be an e-mail attachment in two parts: (1) The case body and (2) The Instructor's Manual (IM). Each submission must also have an **abstract** (example attached) for publication in the Proceedings, plus an **authorization form** (format attached). Please note the abstracts of accepted cases are published on the SWCRA webpage; therefore, **permission to publish is critical**. The electronic copy of the abstract is to be e-mailed to the Track Chair when the case is accepted for presentation.

A case may be submitted to only one track. Submission to multiple tracks will disqualify the case from further consideration. If you are unsure as to which track would be the most appropriate for your case, please contact the Program Chair. As per the Federation of Business Disciplines Policy, a paper/case may not be simultaneously submitted to more than one FBD constituent association.

The case presentations will require the participation of at least one author for the full session on the morning of Thursday March 9th, 2023. At least one of the authors must register for the conference for a case to be on the conference program. Writers are strongly encouraged to participate in the Thursday afternoon sessions as well. It is a great learning experience.

Case Development (a.k.a., Embryo) Track

An "embryo" case is an idea for a case in an early stage of development. Case development (embryo case) submissions are restricted to new case researchers who have never before submitted a case to SWCRA. The purpose of the session is to allow seasoned case researchers to give feedback to new case writers in order to guide the development of their cases. In a roundtable session, participants will discuss topics related to the development of the teaching case and its accompanying teaching note. Embryo case authors will be listed in the program, but embryo cases will not be published in the conference proceedings.

Symposia

Symposia on topics related to case research, writing, and teaching are welcomed. Proposals for symposia should be limited to two pages and should be submitted electronically to the Symposia Track Chair via E-mail. Include an abstract for publication in the Proceedings.

Optional Poster Sessions

This year, a number of the FBD organizations are participating in poster sessions in which presenters sit at tables and discuss their research with other conference attendees. Posters serve to identify the case writer and topic and to serve as visual aids. This will probably take place Thursday afternoon. Participation is optional and in addition to (not a substitute for) Thursday morning's roundtable paper presentations. Participation in these sessions gives SWCRA members an opportunity to discuss their work with other conference participants.

Reviewers

Individuals wishing to participate in the program as reviewers should contact the appropriate Track Chair by August 15th, 2022.

2023 SWCRA TRACK CHAIRS
Program Chair: Robert Stevens
 John Massey School of Business
 Southeastern Oklahoma State University
 PMB #4095 Durant, OK 74701
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<p>Accounting/Finance/Economics</p> <p>Ying Lin, Chair John Massey School of Business Southeastern OK State University Durant, OK 74701 Email: ylin@se.edu</p>	<p>Human Resource Management/ Organizational Behavior</p> <p>Kendra Ingram, Chair John Massey School of Business Southeastern OK State University Durant, OK 74701 Email: kingram@se.edu</p>	<p>International Business</p> <p>Syed Tariq Anwar, Chair West Texas A&M University College of Business Canyon, TX 79016 Phone: (806) 651-2491 Email: sanwar@mail.wtamu.edu</p>
<p>Non-Profit Management/Ethics</p> <p>David Whitlock, Chair John Massey School of Business Southeastern OK State University Durant, OK 74701 Email: dwhitlock@se.edu</p>	<p>Marketing</p> <p>Courtney Kernek, Chair Associate Professor, Marketing Southeastern OK State University Durant, OK 74701 Email: ckernek@se.edu</p>	<p>Small Business/Entrepreneurship</p> <p>Tim Wise, Chair SAU College of Business Southern Arkansas University P.O. Box 9130 Magnolia, AR, 71754 Phone: (870) 235-5159 Fax: (870) 235-4800 Email: tdwise@saumag.edu</p>
<p>Strategic Management/Business Policy</p> <p>Robert Stevens, Co-chair and Martin Bressler, Co-Chair John Massey School of Business Southeastern Oklahoma State University 1405 N. 4th Ave. Durant, OK 74701 Phone: (580) 745-3181 E-mail: rstevens@se.edu</p>	<p>Student Track/Embryo Track</p> <p>Lawrence S. Silver, Chair John Massey School of Business Southeastern Oklahoma State University 1405 N. 4th Ave. Durant, OK 74701 Phone: (580) 745-3190, Fax: (580) 745-7479 E-mail: lsilver@se.edu</p>	

SOUTHWEST CASE RESEARCH ASSOCIATION

CASE INFORMATION AND AUTHORIZATION

Instructions: This sheet must be completed and accompany each case and instructor's manual (teaching note) or symposia proposal that is submitted to the SWCRA annual meeting. Information on this sheet may be used as bibliographic information for indexing. No confidential data should be included. Information should be typed. Cases are to be based on actual organizational data whether primary or secondary. Cases that are not based on actual organizations are a welcome part of the program but are not eligible for the Best Case Award or for publication in the *Journal of Applied Case Research*. Please specify the type of case in question 6.

1. IDENTIFICATION DATA

Case Title: _____ Number of pages ____

Instructor's Manual Title: _____ Number of pages ____

2. AUTHOR DATA: This data should be for the corresponding author. If there are two or more authors, include all data for all authors on the cover page. The order of authors on the cover page will be recognized in the program and in the Proceedings.

Author _____ Title: _____

Name of Organization: _____

Address: _____

Telephone: (W) _____ (H) _____ (FAX) _____

Email: _____

Co-Author: _____ Title _____

Co-Author _____ Title: _____

3. CLASSIFICATION OF CASE (See item 14 for classifications)

A. Type of organization (Select one from item 14)

B. Types of Function (Select no more than four. See item 14)

1.	2.
3.	4.

4. **MAJOR SUBJECT AND ISSUES IN CASE** (List no more than eight)

1.	5.
2.	6.
3.	7.
4.	8.

5. **SETTING OF CASE**

A. Geographic: (If U. S., note state or region) _____

B. Size: (Sales/Employees) _____

C. Year(s) of Case: _____

6. **TYPE OF CASE** (Check one)

Decision Descriptive Critical Incident Teaching tool

Other (please specify): _____

7. **APPLICABLE COURSE(S) OR PROGRAMS(S)**

1.	3.
2.	4.

8. **CASE WRITTEN FOR:** (Check one)

Graduate Undergraduate Industry Note Illustrative Other (specify):

9. **INSTRUCTOR'S MANUAL WRITTEN FOR** (check one)

Graduate Undergraduate Continuing Education Other (specify) _

10. **CASE HAS BEEN CLASSROOM TESTED** Yes No

11. **SOURCE OF DATA** (Check one)

Field General Experience Library Research Student Report

Other (specify) _____

12. **ABSTRACT OF CASE** (Maximum of 100 words)

13. **CASE AUTHORIZATION**

CERTIFICATION

In making this case available for use by the Southwest Case Research Association and others, I certify that authorization has been secured from source and copyright holders for use and widespread distribution. All rights are reserved to the Author(s) and the Southwest Case Research Association. I also certify the case was developed through research.

Signature of Author(s)

Signature of Author(s)

Signature of Author(s)

Date

14. **CASE CLASSIFICATIONS**

Type of Organization (select one)

Business Educational Governmental Non-Profit

Other (specify) _____

Type of Function (selection no more than four)

- | | |
|-----------------------------------------------|--------------------------------------------------------|
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Information Systems |
| _____ Auditing | <input type="checkbox"/> International/Multinational |
| _____ Cost/Managerial | <input type="checkbox"/> Logistics |
| _____ Financial | <input type="checkbox"/> Management |
| _____ Government/Non-Profit | _____ Organizational Behavior |
| _____ Tax | _____ Organizational Structure |
| <input type="checkbox"/> Business Law | <input type="checkbox"/> Management Science/Operations |
| <input type="checkbox"/> Business and Society | Research |
| <input type="checkbox"/> Computers | <input type="checkbox"/> Marketing |
| <input type="checkbox"/> Economics | _____ Advertising |
| _____ Econometrics | _____ Consumer Behavior |
| _____ Industrial | _____ Marketing Strategy |
| _____ International | _____ Marketing Management |
| _____ Managerial | _____ Marketing Research |
| _____ Macroeconomics | _____ Retailing |
| <input type="checkbox"/> Entrepreneurship | _____ Sales Management |
| <input type="checkbox"/> Environment | <input type="checkbox"/> Personnel Mgmt/Industrial |
| <input type="checkbox"/> Finance | Relations |
| _____ Banking | <input type="checkbox"/> Production/Operations Mgmt |
| _____ Financial Institutions | <input type="checkbox"/> Small Business |
| _____ Financial Management | <input type="checkbox"/> Statistics |
| _____ Financial Strategy | <input type="checkbox"/> Strategic Management |
| _____ Investments | |

Thank you for your submission.

We look forward to seeing you in Houston!

Caked Up! On the Go

Kendra Ingram, Southeastern Oklahoma State University
Courtney Kernek, Southeastern Oklahoma State University
Rhonda Richards, Southeastern Oklahoma State University

Case Objectives and Use

This case examines the opportunities available for a local bakery to expand and open a food truck with the two most popular items – cupcakes and coffee. The case requires the student to consider variable costs, fixed costs, breakeven and margin of safety. The case also has a lease or buy decision for the actual food truck. Recommendations are based on continuing with the bakery without a food truck, leasing the food truck or buying the food truck. The information given provides opportunities for return on investment with assumptions made for growth and pricing.

To solve this case and provide choices to Lauran, the student can provide two different options as well as make recommendations for other options to be considered. The student will need to develop a contribution margin income statement based on assumptions for growth, pricing, investments and the resulting interest and depreciation. This case could be used in a Cost Accounting course, an Entrepreneurship course, a Strategic Management course, or a Managerial Accounting course in an MBA program. The focus on the case can be defined based on the course. If the focus remains on the financial analysis, the instructor could use this information to require students to set up an Excel spreadsheet with what if scenarios. In addition, the cost accounting class could present this case study to a group of investors with the requirements of explaining the formulas and the purpose and use of each formula to an audience of investors.

Case Synopsis

Caked Up! has been in business since March of 2014. Lauran has made a niche in her local town with her distinctive cupcakes in assorted flavors that alternate daily. And recently, she has added fresh brewed coffee. The coffee beans are sourced from a high-quality supplier and the delicious aroma and flavor is attracting new customers. After meeting with a consulting team, Lauran has decided she wants to go for it and open up a food truck while still maintaining her current storefront bakery. She has some capital but will need to take out a loan for the purchase of the food truck and equipment. However, the loan is contingent upon the analysis of an updated business plan that includes the food truck and demonstrates a roadmap to success. In addition, Lauran must contribute \$5,000 of retained earnings that she has to invest from her bakery. She has gathered financial data, as well as environmental and competitive data. She also has the option to lease the food truck and must consider that, as well.

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