

# The CASE Journal

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The Journal of  
the CASE Association

# The CASE Journal ~ Volume 6, Issue 1 (Fall 2009)

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## EDITORIAL POLICY



The audience for this journal includes both academics and practitioners and thus encourages submissions from a broad range of individuals.

*The CASE Journal* invites submissions of cases designed for classroom use. Cases from all business disciplines will be considered. Cases must be factual, and releases must be available where necessary. All cases must be accompanied by an instructors' manual that identifies the intended course, relevant theoretical concepts or models that can be applied, and the research methodology for the case. The instructors' manual should also contain discussion questions with suggested responses and a teaching plan if not inherent in the Q&A.

*The CASE Journal* also invites submissions of articles relating to case teaching, case writing, case reviewing, and similar topics. Conceptual papers and papers reporting original research as well as the applied implications of others' research in terms of case teaching, research, and instruction are welcome, as are creative learning, research and writing methods that have been tested in the classroom or in practice, including critical incidents and industry or technical notes.

Because of the broad appeal of the journal to practitioners and academics, *The CASE Journal* will not refuse to review a case or an article solely on the basis of format. However, if a case or paper is accepted, the final version for publication will be expected to adhere to the publication and manuscript guidelines. Cases and papers may be returned due to issues relating to writing style and grammar; please use a grammar- and spell- checking tool prior to submission.

*The CASE Journal* encourages authors to submit often to the Journal. However, authors who are identified as the primary author published in one publication year will not be published a second time in that same publication year. Rather, additionally accepted papers will appear in subsequent publication years. This policy does not apply to authors who submit papers for review with different second authors from those on the first accepted paper in any given publication year.

**CASES:** Those wishing to submit a case for potential publication should submit the entire case along with the completed instructors' manual for review. If accepted for publication, only the case will be published along with a note for interested readers to contact the case author for the teaching notes. Cases will be reviewed and published using the same general rules that apply other scholarly articles. The author must submit a signed letter of liability release prior to the publication of a case. Authors are responsible for distributing the instructors' manual as requested.

### **INITIAL SUBMISSION:**

All cases and articles will be subject to a double blind developmental review process. Our reviewers will offer suggestions for improvement and revision, where appropriate.

All manuscripts submitted are to be original, unpublished and not under consideration by any other publishing source. To ensure the blind review, there should be no author-identifying information in the text or references. An abstract of 150 words or less should accompany any article, and should be included in the instructors' manual accompanying any case. This journal will only accept on-line submissions. Send one (1) copy to the editor by e-mail in an MS-Word document (.doc not .docx). A separate title page must accompany the paper and include the title of the paper and all pertinent author information (i.e. name, affiliation, address, telephone number, FAX number, and e-mail address). If any portion of the manuscript has been presented in other forms (conferences, workshops, speeches, etc.), it should be so noted on the title page.

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Please see the FAQ on [www.caseweb.org](http://www.caseweb.org) for formatting guidelines for accepted cases.

#### **Circulation Data:**

Reader:	Academic and Practitioner
Frequency of Issue:	2 times per year (Fall and Spring, based upon available accepted manuscripts)
Copies per Issue:	n/a Internet publication
Subscription Price:	Free with membership in The CASE Association
Publishing Fee:	None. However, at least one of the publishing authors must be a member of the CASE Association at the time of publication (\$25 membership fee)
Sponsorship:	Professional Association

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## From the Editor

November 2009

This is my first issue as editor, and I'm delighted to have this opportunity to learn, share, and grow in case writing and teaching with you. I intend to investigate a different topic related to cases in each issue, before I describe the contents of the issue. I'd like to start off with a critically important topic: case review.

A few years ago, a colleague came to me in tears, holding a review of a paper she had submitted. I will share with you (with her permission) an excerpt from this review:

“...It's clear to this reviewer that the author does not know what he's talking about. This is just a laundry list of facts without anything tying them together. He says he wants to use qualitative research, but there is no indication that he knows what that is. He can't form a hypothesis...start again...”

I looked at her paper and, it was true—the manuscript was no good. She really DID need to start again. But where was she to begin? The rest of the review continued in the same vein as it began, telling the author in broad and unpleasant generalities that his [sic] work was a waste of time, but the reviewer did not provide any guidance for this inexperienced academic to help her revise her paper to make it more acceptable and potentially publishable.

All of us succumb occasionally to the careless, hurried review of a student paper or a journal or conference submission. But, every time I am tempted to dash off a fast review, especially a rejection or a revise and resubmit that requires substantial work on the part of the author, I think of my colleague and her frustration (and hurt).

We are especially mindful at The CASE Journal of the feelings of our authors; we have all been in the same position, and many of us continue to risk our egos at the hands of the peer review process—at the very least, it keeps us humble. A Professor Moore (sixth in the series) article appears in this issue that deals directly with the reviewing process, but I want to emphasize in my editorial comments that our CASE reviewers are particularly adept at doing developmental reviews and writing them up clearly and constructively for our authors. It's something we take special pride in, and we all strive to improve our reviewing through experience.

I'd love to hear some feedback from you about reviewing, good and bad reviews you have experienced or written, guidelines you maintain on your own for your reviewing practice...this is a great place to share some of your good ideas about collegiality, developmental and constructive reviewing, and what you prefer to read (besides “I am pleased to accept...”)!

I am starting off this conversation with my own **10 Commandments for Case Review**:

1. *Assume that your words of criticism sound harsher than you meant them to sound.* People read your critique without hearing or seeing your personal style of delivery, your wink, your smile, your intent. In order that you not be misunderstood, it is useful to moderate your comments wherever possible so as not to sound cruel to the author.
2. *People like (and need) to hear the good news.* There is no such thing as a case that doesn't have something good to offer the reader. Find it and comment upon it. In writing. Right up front.
3. *You are not judging the author, only the quality of the author's work and its appropriateness for your venue (conference, journal).* If, like me, you get impatient with multiple grammatical errors (I think they show incredible disrespect for the reader), learn how to say, "Multiple grammatical errors (see p. 11, lines 3,6,9, 14, and 22) detract from the quality of the case and distract the reader's attention" rather than "Don't waste my time with this quality of writing."
4. *Remember the Golden Rule and do not treat others as you would not like to be treated.* Keep in mind those first reviews you received on your article submissions early in your career. Did you cry? Do you wish to make others cry? Your self-evaluation should be about the level of constructive criticism you were able to provide to the case author. If it's not constructive, it's not valid.
5. *It's not all about you.* The purpose of the developmental review is not to show how much you, the reviewer, know. It is to help the author understand how to improve the case so that it is publishable according to your standards. It is your knowledge that helps the author attain those standards, so your goal is to share that knowledge in a modest way and not to humiliate the author.
6. *Be as specific as you can with your suggestions.* Instead of saying, "Eliminate jargon," try saying, "Eliminate jargon. Specifically, on page 16 you write about connecting jumpers to the MDF without a floor plan. Instead, you could discuss insuring that floor plans provide the information necessary to connect the main distribution frame to the temporary wiring frame. Unless the case is designed only for telecommunications technicians, people will not understand the MDF and jumpers comments." This will allow the author to understand the extent of the jargon that has been used, seek it out, and destroy it.
7. *Be generous with your praise.* It doesn't cost you anything and is a good investment in the case writer's future. Every item that you comment favorably on is one that the author will repeat in future cases. This is a great opportunity to plant the seeds for quality cases and case reviews in the future.
8. *The "rules" for publishable cases are consistent from journal to journal.* Does the case have a decision focus? Not all cases have them, but if the goal is to make a case publishable, it is preferable (not required) to conclude with a decision point. Sometimes

the case author is too close to the case to find the decision point, but you, at a distance, may see that the case needs to end earlier so that the decision can be made by the reader. Point out the appropriate decision and explain WHY that is the place to end the case. It can be very hard to understand this, and authors will make the same mistake again and again in subsequent cases.

9. *Keep the goal in mind.* Case writing is a process, not an end point. Your role will differ depending on the quality of the case you are reviewing and the experience-level of the case writer. New case writers need *very gentle* handling and significant guidance, just as our first year students do. More experienced case writers will grasp your suggestions more readily and require less explanation, but they will provide you with great opportunities to set stretch goals. You need to be prepared for this; it's not always easy for the reviewer to offer suggestions for a case that is pretty good to begin with. The most difficult task you will have is to offer a good, developmental review for a case that is in good condition and which has a solid teaching note. These cases are the most fun, because you really have to work to make an improvement that the case writer will value. This is when you will recognize that the writer/reviewer relationship is an interdependent partnership from which both benefit.
10. *Take your responsibility very seriously.* Authors are depending on you to show them the way to improve their case writing. And the way you teach them is the way they will teach others.

I owe a debt of gratitude to Peggy Naumes, our outgoing editor, for preparing me to undertake the editorship of *The CASE Journal*. This is a big job, and I doubt that anyone is really prepared for what it takes to put out a quality journal, but Peggy did a good job of getting me ready (and continues to support me in my efforts). I'd also like to thank my graduate assistants who have worked very hard to design a database that incorporates all six years of our journal (Vesela Kardzhilova-Dimitrova) and redesign and update some of our procedures and models (Tricia Coia). I don't know how Peggy managed without them!

This issue of the journal contains work that Peggy had accepted as editor, but that did not appear in her last issue because of timing, as well as cases that I have accepted personally. I have already mentioned the sixth appearance of Prof. Moore's case writing adventures. If there is a topic you would like for Prof. Moore to address, please let me know.

There are five cases in this issue, and they range from in usage from undergraduate through instructor-training for new academics. I hope you enjoy them.

- "Stakeholders and corporate environmental decision making: The BP Whiting Refinery controversy" deals with stakeholder analysis relating to building a new oil refinery—do the economic development benefits outweigh the detriments of pollution?  
[Secondary sources, **UG BGS**]

- “Ken Roberts: Master mechanic” needs to decide how to handle a car left in his parking lot by an unknown customer—should he work on the vehicle or just refuse to get involved?  
[Field research, **UG Marketing**]
- “Deaf in the Family: The pursuit of a business venture with uncertain profit potential” focuses on the dichotomous pulls of passion and making a living—should the owners face the uncertainty of financial success in producing hip hop records or should they continue to focus on their livelihood of making commercial music?  
[Field research, **UG Marketing/Entrepreneurship**]
- “The Untsiya Company: Business development in Russia” is about a chain of Russian tea shops—the owner is trying to decide on a new growth strategy and how to allocate resources for that strategy.  
[Field research, **graduate/EMBA Entrepreneurship**]
- “Pedagogical issues: Towards culturally responsive teaching strategies at Morris University” provides a self-disclosing picture of the challenges inherent for a new academic in teaching in an environment that is culturally different from one’s own—how can the new professor create a teaching environment that works both for students and for the instructor?  
[Field research, **graduate Pedagogy**]

**Gina Vega**  
**Editor**

# **CASE AND ARTICLE ABSTRACTS**

## **Volume 6, Issue 1 (Fall 2009)**

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### **Stakeholders and corporate environmental decision making: The BP Whiting Refinery controversy**

**Bryan T. Stinchfield, Franklin & Marshall College**

In 2007, BP sought and received regulatory approval to expand operations at its Whiting Refinery in northwest Indiana. Had the project gone forward as planned, the refinery would have discharged significantly higher levels of pollutants into Lake Michigan, but would have also contributed to economic development in the region. The result of BP seeking and being granted regulatory approval triggered a firestorm of controversy from multiple segments of society. This case study draws from secondary sources to examine the positions of a variety of stakeholders who influenced BP's decision as to whether or not it should expand its Whiting Refinery. Relevant stakeholders included for analysis are citizen and environmental organizations, political groups, trade associations, BP's employees, and stockholders. The intended target audience for this case is upper-level undergraduate business students studying issues related to business and society, such as corporate social responsibility and sustainable development.

Key words: stakeholder theory, stakeholder management, sustainability, corporate social responsibility

### **Ken Roberts: Master mechanic**

**Duncan LaBay, Salem, Salem State College**

Ken Roberts, the owner of an independent automotive repair business in small coastal city in New England, arrived early for the workweek to discover an unscheduled and unknown vehicle awaiting repair in the driveway. Ken needed to develop a tactical plan for dealing with the owner and the potential repair of the vehicle, mindful of his reputation as one of the best independent shops in the area. As a service marketer, beyond providing competent repair work, he knew that word of mouth was crucial to his business's continued success. Students are challenged to evaluate this situation and provide recommendations within the context of the marketing of services.

Key words: services marketing, gap analysis, customer satisfaction

**Deaf in the Family:  
The pursuit of a business venture with uncertain profit potential**

**Stuart Rosenberg, Dowling College**

Josh Brochhausen and Adam Podrat, as partners in The Resource, wrote commercial music for the ads of several companies. They were innovators in the recording studio, and their music appealed to young consumers. Josh and Adam also had become involved in producing records for hip hop artists. They undertook a project called Deaf in the Family, which was a full length album featuring artists from the hip hop underground. The record was well received among music critics from the underground press, but the project made no money because Josh and Adam did not have the financing to secure the appropriate clearances for the right to use samples from existing songs. Their problem centered on the uncertainty of financial success in producing hip hop records, which was their passion, and deciding whether to devote energy and resources toward it, and away from making commercial music, which was their livelihood.

Key words: decision-making under uncertainty, commercial value vs. artistic value

**The Untsiya Company: Business Development in Russia**

**Galina Shirokova, St. Petersburg State University (Russia)**

**Gina Vega, Salem State College**

In December 2007, Sergey Nikolaev, founder and CEO of the *Untsiya* company, a tea shop chain in St. Petersburg, Russia, was facing a major decision about the future of his company: should he diversify the business or focus solely on tea sales via exclusive shops? Founded in 2002, the *Untsiya* Company had enjoyed dramatic growth and great success in the St. Petersburg market. By 2007, having directed the successful roll-out of his tea shop chain, Nikolaev wanted to grow to the next level and was prepared to revise his corporate strategy, even to the extent of changing his existing, stable organizational structure. Students are challenged to select a growth strategy and related organizational changes to implement that strategy.

Key words: organizational life cycle, transitions, entrepreneur to manager

**Pedagogical issues:  
Towards culturally responsive teaching strategies at Morris University**

**Devi Akella, Albany State University**

Nina, a 30-year old Asian Indian female, joined Morris University in the fall 2006 semester after completing her doctorate. She was an instructor and course designer at this historical black institution in a rural town in the southern part of the US. Ninety percent of the students and staff of Morris University (MU) were African-American. MU was committed to the objective of educating African-American youth and the concept of “students first” was one of its core institutional values. Nina’s experience teaching an organizational learning course was very unpleasant. Her student evaluations were poor with harsh comments about her and the course. Nina was asked by the department head to prepare a teaching improvement plan for herself.

Key words: teaching strategies, diversity, culture, organizational learning

**Invited Article**

**Case Writing and Research: Professor Moore Reviews a Case**

**Gina Vega, Salem State College  
Herbert Sherman, Long Island University  
Thomas Leach, University of New England**

This is the sixth in a series of articles about case research, writing, teaching, and reviewing. In this article, the protagonist, Prof. Moore, consults experienced case reviewers and learns several different approaches to reviewing cases for journal publication. The article is written as if it were a case; it is fictitious.

Key words: case reviewing, case writing

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