

PROGRAM AND PROCEEDINGS WESTERN CASEWRITERS ASSOCIATION CONFERENCE

Held on March 14, 2024
Hilton Long Beach, Long Beach, California

Edited by Julian Vogel

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PRESIDENT'S WELCOME

Dear Colleagues,

With great pleasure, my fellow WCA officers and I welcome you to the WCA conference in Long Beach, California. We are excited to meet those of you new to the conference and to mingle with new and old friends. We look forward to the mutual benefit we all gain from sharing input and interacting with colleagues. Your dedication to learning and teaching with cases drives WCA.

The continued changes we and our students face generate continued need for case writing and teaching. Teaching cases provide engaging and valuable opportunities for learning that are vital as we and our students adapt to change. Cases provide a safe and fun learning opportunities that allow students to integrate concepts and theory with practice, trying out the positions of leaders while drawing on their own experiences. I personally enjoy case teaching because of this interaction, which also allows me to learn from my students.

Our WCA is dependent on your involvement and the contributions of our supporters. Julian Vogel has put together an innovative and impactful program. Andre Avramchuk, our past president, Arun Aryal, our webmaster, and Teresa Martinelli, our treasurer, have made this year's WCA conference possible. Steve McGuire continues as the editor of WCA's peer-reviewed journal, *Journal of Case Research and Inquiry*, assisted by Yang Zhang, the associate editor. Yvette Bendeck will take on the role of Program Chair for 2025, and I look forward to another exciting program. Thank you to all of this year's dedicated case authors and reviewers!

You are among friends with shared interests at the WCA conference. WCA is a unique and supportive environment that encourages case writing, learning, teaching, and fun! I wish you safe travels and I look forward to seeing you in Long Beach.

Warm regards,

Kathryn Aten
President, Western Casewriters Association

WCA 2024 SCHEDULE

Pacific Time

- 7:00-8:00** **Breakfast**
- 8:00-8:45** **Land Acknowledgement and Keynote Address** (International 4)
Chairwoman Sandonne Goad, Gabrielino/Tongva Nation
- 8:45-9:45** **Promoting Diversity, Equity, and Inclusion in Case Research and Teaching**
Dr. Caroline Chen, San José State University
Chairwoman Sandonne Goad, Gabrielino/Tongva Nation
Dr. Franziska Renz, California State University, Sacramento
Dr. George Whaley, San José State University
- 9:45-10:00** **Break**
- 10:00-10:15** **Welcome & President's Remarks**
- 10:15-10:30** **Roundtable Etiquette & Feedback Process**
- 10:30-11:45** **Roundtable (Case 1)**
- 11:45-12:45** **Lunch**
- 12:45-1:45** **Roundtable (Case 2)**
- 1:45-2:45** **Roundtable (Case 3)**
- 2:45-3:30** **Friends and Partners of WCA: North American Case Research Association**
Dr. Eric Dolansky, Brock University
- 3:30-3:45** **Awards Presentation and Closing**
Best Case
Best Mentored Case
Best Reviewer
- 3:45-4:00** **Break**
- 4:00-4:45** **WCA Business Meeting**
Treasurer's Report
Journal of Case Research and Inquiry
Select Program Chair-Elect 2026
Other New Business

Participants are cordially invited to attend the joint reception of WCA and WAM from 5:30 pm to 7:30 pm in Catalina.

WCA 2024 TABLE ASSIGNMENTS

Table 1

- Mars Air Systems: Alliance and Growth Opportunities in a Long-Standing Niche Industry - *Edan Epstein*
- Saving Yuca's Restaurant: An Effort to Makes Ends Meet - *Yize "Jim" Zhang, Christian Casados, Damon Dees, Elisabeth Low, Griselda Nuno, Hamza Waqar, Luz Perez, Povrotanak Cheatha, John Cooper, Steve McGuire*
- The difficult entrepreneurial journey of a social advocacy nonprofit in Long Beach - *Claudia Barrulas Yefremian*

Table 2

- Does Size Matter? A Pornographic Distraction Or Body Shaming – Schoolteacher Kayla Lemieux Shows Up For Work - *Natalie Assaad, Prescott C. Ensign*
- Innovation in Staffing and Recruitment at Kaiser Permanente during and after the Pandemic - *Edan Epstein*
- It Was Just a Kiss! - Sexism in Professional Women's Soccer? - *Virginia Bratton, Scott Bryant, Myleen Leary*

Table 3

- Court Appointed Special Advocates (C.A.S.A.): Organizational Change and Leadership - *Craig R. Seal, Di Fan, Shammi Gandhi, Maria S. Garcia Guzman, Patrick Flaherty, Shardul Kulkarni*
- Starlux Airlines Flying High After the Chairman Ouster at EVA Airways - *Caroline Chen, George Whaley*
- Was The Acquisition Of Twitter Inc. By Elon Musk A Taxable Transaction? - *Gretchen R. Lawrie, John R. Cooper*

Table 4

- "Food is Medicine" – The Project Angel Food Case - *Yize "Jim" Zhang, Steve McGuire, Yang Zhang*
- Introducing Costa Rica To Wine Culture: Vino Mundo - *Sarah Lee, Jacob A. Massoud*
- Shan - From Humble Origins To Global Spice Dominance - *Faria Shaikh*

Table 5

- Burkini Ban At The Marriott Hotel – Sousse, Tunisia - *Amy Smith, Prescott C. Ensign*
- Bye, Bye, Binance? - *Caroline Chen, Danielle Lazerson, C. Kyle Jones, Emmanuel Sequeira*
- Lost Keys, Tested Loyalties: A Banking Branch's Trial - *Franco Olla, Stephen J. J. McGuire*
- The Duality Of America's Talk Show Sweetheart: Drew Barrymore's Decision To Return Daytime Show To Air Amid Writers' Strike - *Deveena Bharat, Destynie Sewell, Prescott C. Ensign*

Table 6

- Critical Problem-Solving in the Financial Sector: Building a Partnership for Cyber Security - *Judy Esquibel, Kathryn Aten*
- Decision Making Disaster?: Process Driven Decisions In Difficult Circumstances - *Ryan Davis, Alex Bolinger*
- Relationship Marketing Of Caterpillar: How To Win The Battle In Mongolia - *Chutamas Tavivongpaiboon, Tserennyam Sukhbaatar*

Table 7

- Organizational Diagnosis Of Upkeep Technologies Inc. - *Aisha Groce, Benjamin Komeh, Ching Yi (Joyce) Ma, Sterling Lewis, Urvashi Sinha*
- Underpaid? - *Rehnaz Karanjia, Alicia Pino, Alex Bolinger*
- What is the Best FDA Drug Approval Path: Flexible Drug Development or Conflict Resolution? - *George Whaley*

ABOUT THE WESTERN CASEWRITERS ASSOCIATION

The Western Casewriters Association (WCA) Conference is held yearly in conjunction with the Western Academy of Management (WAM). Participants can attend both conferences. The WCA Conference is a unique opportunity to engage with other case writers in a small group format to exchange feedback and polish a case, learn about using cases in the classroom, get a peer-reviewed conference and proceedings on a vita, and enjoy presentations from leading case researchers and case educators.

The WCA Conference is an excellent professional opportunity because it is a "developmental" meeting designed to provide feedback from experienced case researchers. Submissions are double-blind peer reviewed. Participants at the conference will have their cases reviewed by other authors. The objective is to help participants move their cases toward journal publication.

HISTORY

The Western Casewriters Association was started by Dick Eisenbeis in 1989 at the Western Academy of Management. It has convened an annual case writing conference in the roundtable format since then to help train, develop, and support case researchers.

Past presidents of the organization include:

Sally Baack
Jyoti Bachani
Issam Ghazzawi
Leslie Goldgehn
Duane Helleloid
Anne Lawrence
Teresa Martinelli
Steve McGuire
Joshua Mindel
Bruce Robertson
Keith Sakuda
V. Seshan

Jeff Shay
James Spee
Teri Tompkins
Michael Valdez
George Whaley
Joan Winn
Andrew Fergus
Deborah Walker
Nina O'Brien
Melanie Reed
Andre Avramchuk

2023 – 2024 WCA OFFICERS

President: **Kathryn Aten**, Naval Postgraduate School

President Elect & Program Chair 2024: **Julian Vogel**, San José State University

Treasurer: **Teresa Martinelli**, University of La Verne

Webmaster: Arun Aryal, California State University, Los Angeles

Program Chair Elect: Yvette Bendeck, University of Houston – Clearlake

Past President: Andre Avramchuk, California State University, Los Angeles

2024 WCA REVIEWERS

This conference would not be possible without the dedication contribution of our many reviewers who provide thoughtful, thorough, constructive and timely feedback on cases.
Thank you so very much for your valuable service to WCA!

Kathryn Aten
Andre Avramchuk
Yvette Bendeck
Scott Bryant
Caroline Chen
John Cooper
Prescott Ensign
Edan Epstein
Judy Esquibel
Gretchen Lawrie
Sarah Lee
Kent Lutz
Stephen McGuire
Melanie Reed
Franziska Renz
Destynie Sewell
Pradip Shukla
Tserennyam Sukhbaatar
John Walsh
George Whaley

WCA AWARDS PROCESS

Three awards will be given at the WCA Conference this year. Reviewers' highest ranked cases were considered for an award. The Program Chair reread the highly ranked cases to determine the winners in consultation with reviewers.

The first award presented at the Conference will be the "Best Case Award," for which all submissions are considered. The second award presented at the Conference will be the "Best Mentored Case Award", which recognizes the best case written by a student author(s) with the guidance of a faculty mentor. The third award presented at the Conference will be the "Best Reviewer Award", which recognizes a reviewer that went above and beyond in the quality and quantity of their review services.

Award winners will be recognized at the close of the Conference.

2024 Award Winners

Best Case Award

The difficult entrepreneurial journey of a social advocacy nonprofit in Long Beach
Claudia Barrulas Yefremian

Best Mentored Case Award

Does size matter? A pornographic distraction or body shaming – schoolteacher Kayla Lemieux shows up for work
Natalie Assaad and Prescott C. Ensign

Best Reviewer Award

Franziska M. Renz

HOW TO GET THE MOST OUT OF THE CASE DISCUSSION SESSIONS

The Western Case Writers Conference (WCA) is a developmental workshop. Each person contributes to each case discussion and in turn receives feedback from each other person at their roundtable. Participants' preparation prior to the WCA and active participation at the WCA are crucial to the usefulness of the roundtable discussions and the value added that the Conference can deliver. Conference participants typically report that they were delighted with the helpful, constructive feedback they received.

PURPOSE OF WCA CASE ROUNDTABLE DISCUSSIONS

The purpose of the WCA is to assist all case researchers to improve their cases for use in classes, for adoption by others, and for publication. Rarely is a case presented that is ready for journal publishing; yet even such a case can be improved. Case authors may feel overwhelmed by all the suggestions. The process is not negative; rather, we work with you for improvement, just as we expect that you will help others to improve their cases. Therefore, all participants must thoroughly prepare all cases and instructor's manuals (IMs) (aka TN teaching notes). The discussion process is rigorous yet done in a supportive manner. You should expect that the first case discussed, long or short, would take more time than those that follow. Some issues will occur in several cases; discussion need not be repeated in detail after the first time the issues arise.

PREPARING FOR CASE ANALYSES & FEEDBACK

The focus should be on major, as well as subtle ways, to improve cases; not on proofreading details of grammar, spelling, etc. To give helpful feedback, you may (1) mark up the cases and instructor's manual and give them to the author after discussion; or (2) prepare a summary of your comments and helpful suggestions prior to the Conference, and hand your written comments to the author. Important questions include:

- ✓ Is the case interesting? To students? To faculty? To potential journals?
- ✓ Does it address an important issue in the specified course(s)?
- ✓ Can teaching objectives be achieved with the case? Does the IM address these?
- ✓ Can the IM analysis be derived from the case (and other course material)?
- ✓ Are there enough data? Should more be added? Should some be deleted?
- ✓ Is the analysis tied to theory?
- ✓ Is the case presentation unbiased or is the author's opinion evident?

DUTIES OF PARTICIPANTS IN THE CASE ROUNDTABLES

Table Leaders: Brief the participants about what will happen. Determine the case sequence (typically the sequence that is on the Table Assignments document is followed). Be sure there is a recorder for each case. Guide the discussion. Keep the

focus on important issues, not on proofreading. Discourage repetitious comments. Be sure to be a timekeeper or assign one.

Recorder: Document the substance of comments. A copy of each case and IM will be emailed to each table participant. Provide your notes to the case author(s).

Case Author(s): Prepare some opening remarks that explain why you wrote the case, how you have used it in class (if you have), and any issues you are having with the case. Listen to the comments and ask questions.

Discussants and Participants: Review cases thoroughly, provide feedback, and participate actively. There may be participants in your session who are not presenting a case. They are there to observe, to learn, and to participate. Welcome them. Most participants find that these sessions are more enjoyable and collegial than any other type of academic conference they attend. We hope that you will agree. We have planned the WCA Conference to provide interesting, enjoyable, and instructive activities.

AFTER THE CONFERENCE

Revise your case and IM to develop and improve as needed. Carefully consider all session comments; some changes may not be appropriate or feasible; you must decide what to change and not to change. Some suggested data might not be available. However, you are likely to see the more cogent changes you do not make in reviews of your case when you submit it to a journal. Can you defend your choices when you respond to a reviewer? Test-teach the revised case and update your IM based on that teaching experience. Ask a colleague to observe your teaching or to teach the case, if possible; he or she will find things you missed or that you know but did not include. (The author always knows details not included in the case.)

Submit your revised Case and IM to the Journal of Case Research and Inquiry (JCRI), the Case Research Journal (CRJ), or to another scholarly journal. Most journal submissions will require at least one revision before acceptance. Failure to revise and resubmit represents the largest reason that submissions to the Case Research Journal are not published. If one journal rejects your case, do not be vexed, as it may be an appropriate fit with another journal.

WCA members may have suggestions about which journal would be a good outlet for your case. Once your case is accepted by a journal, or finally rejected, it is then appropriate to submit it to book authors for adoption. Note however, that any earlier acceptance by book authors disqualifies your case for most journals. Book acceptances often carry merit, depending on your university, but rarely have as much academic credit as acceptance by a peer-reviewed journal.

“How to Get the Most out of the Case Discussion Sessions” was prepared by NACRA authors Timothy W. Edlund and Linda E. Swayne and adapted by Jeff Shay, Stephen McGuire, Duane Helleloid, and Leslie Goldgehn for WCA’s purposes. Some edits were made by Deborah Walker in 2018. WCA thanks NACRA for use of the document.

PUBLISHING YOUR CASE

Publishing your case in a peer reviewed journal not only meets the standard of quality expected of all research, but also allows your work to be used by others. That is what you want and that is what WCA wants for you.

For a list of publication opportunities, visit “Case Publishing Outlets” through the link on our website, www.westerncasewriters.org.



CALL FOR CASES, NOTES, AND ARTICLES: JCRI

The *Journal of Case Research and Inquiry* (JCRI) is the peer reviewed online publication of the Western Casewriters Association (WCA) and is listed in *Cabell's Directory of Publishing Opportunities*. The JCRI publishes (1) TEACHING CASE STUDIES in business and public administration, nonprofit management, social entrepreneurship and economic policy; (2) NOTES - industry or theoretical analyses to accompany cases; and (3) ARTICLES on case research and teaching with cases.

JCRI publishes cases, notes, and articles online. That way they are available full-text and free of charge to educators and students. Educators are encouraged to place in their syllabi links to JCRI cases, notes, and articles.

Authors should review the JCRI submission guidelines by visiting JCRI's web page <http://www.jcri.org/>. Authors may contact the editor, Steve McGuire or associate editor, Deborah Walker, at editor@jcri.org.



NACRA

NORTH AMERICAN CASE
RESEARCH ASSOCIATION

CALL FOR CASES: CRJ

The *Case Research Journal* (CRJ) is published by the North American Case Research Association (NACRA). The CRJ is the leading academic journal for cases in business and related disciplines in North America. The Case Research Journal publishes outstanding field-research-based, decision focused teaching cases drawn from research in real organizations, dealing with issues in all administration-related disciplines. Occasionally, the Journal publishes papers concerning case research, case writing or case teaching. All manuscripts are double-blind refereed by Editorial Board members and ad hoc reviewers.

The journal publishes four issues a year and has an acceptance rate of approximately 20 percent. Cases published in the CRJ are distributed directly to libraries and subscribers and online through NACRA's publishing partners, including, Harvard, Ivey, The Case Centre, McGraw-Hill Create, Pearson Collections, and Study.net. Authors should review the CRJ submission guidelines by visiting NACRA's web page <https://www.nacra.net/case-research-journal/>.

Authors may contact the editor, Gina Grandy at crj.editor@uregina.ca if they have questions.

WCA 2024 ACCEPTED CASE SYNOPSIS

Case synopses have been edited for length and format. WCA authors retain all rights to their intellectual work product; please contact the author(s) for permission to reproduce or use a case.

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Burkini ban at the Marriott Hotel – Sousse, Tunisia **Amy Smith and Prescott C. Ensign**

This case explores a Marriott hotel's decision to join a growing number of hotels in Sousse, Tunisia with the implementation of a controversial burkini ban. The case assesses the implications of this decision from a business ethics perspective and within the broader discourse on modesty and freedoms. The case draws comparisons to ongoing debates in France, exploring the historical influence of French colonialism on Tunisia and its impact on societal attitudes towards Islamic clothing. The historical backdrop helps students understand the nuances of Tunisian life and the balance between traditional Islamic values and modern, business-oriented secularism. The case focuses on an incident at the Sousse Pearl Marriott Resort & Spa involving Jannette Mensi being asked to leave the public adult pool due to her burkini and highlights the business-related factors which influenced the hotel's decision (i.e., customer complaints and social pressure). A boycott catalyzed by social media and a viral TikTok video demonstrate potential consequences for business operations and brand reputation.

Bye, bye, Binance? **Caroline Chen, Danielle Lazerson, C. Kyle Jones, & Emmanuel Sequeira**

On November 21, 2023, Changpeng Zhao (better known as "CZ"), the founder of Binance, the world's largest cryptocurrency exchange, resigned as a result of settling United States charges against him and Binance (X, 2023). At its height, the company was estimated to be worth as much as \$300 billion and CZ is its largest shareholder (Kowsmann, and Ostroff, 2021). After CZ's resignation and the admissions of guilt, Binance lost 30% of its market share, and faced withdrawals of nearly \$1 billion of deposits from its nearly \$79 billion in assets (Ledeman, 2023; Malwa, 2023), but as of January 2024, Binance remained the highest-volume cryptocurrency exchange. Binance had 5 times the daily trading volume of Coinbase, its only publicly traded competitor which has a market capitalization of \$31 billion (CryptoCompare, 2024).

Court Appointed Special Advocates (C.A.S.A.): Organizational change and leadership **Craig R. Seal, Di Fan, Shammi Gandhi, Maria S. Garcia Guzman, Patrick Flaherty, & Shardul Kulkarni**

Court Appointed Special Advocates of San Bernardino County (C.A.S.A. of SBC), a small non-profit (13-full time staff) in San Bernardino County (SBC), recruits, screens, and trains volunteers to serve as Court Appointed Special Advocates (C.A.S.A.) for youth living in the foster care system in SBC. C.A.S.A. of SBC provides service to over 150 youth in foster care through the support of over 80 C.A.S.A. volunteers, with an operating budget of \$1.5 million. Toward that end, in the fall of 2023, the organization found itself amid a leadership transition. Having had two Executive Directors in the last two years, the Board needs to decide if they

continue in the search for a third Executive Director (in so many years) or consider an alternative path forward. The options for the C.A.S.A. of SBC Board include the following courses of action: (1) Do they hire another Executive Director? (2) Do they build leadership capacity within the current organizational staff? (3) Do they look to merge (or be acquired) by another non-profit entity? or (4) Do they bring on an external interim Executive Director to buy more time to make a final decision?

**Critical problem-solving in the financial sector: Building a partnership for cyber security
Judy Esquibel & Kathryn Aten**

In 2016, John Smith, a respected leader in the financial industry, was concerned as he reflected on a series of working group sessions of high-level financial industry leaders he had attended. The working groups included financial industry experts who had self-organized following a disastrous Sony Pictures hack of 2014, to discuss how to protect the financial industry from a similar plight. More than 100 industry leaders had been working for over a year to understand their industry's vulnerabilities and identify and take actions to protect against cyber security threats. The industry needed to decide how to protect sensitive customer data, such as accounts and balances. The group had reached a crucial juncture. They needed to agree on a plan and present it to federal regulators. If they couldn't self-govern, they expected that government leaders would impose possibly burdensome regulations. John Smith needed to share his concerns about the direction the groups seemed to moving, engage supporters, and develop a plan to maintain the fledgling collation.

The case provides an opportunity to explore cyber securing threats, the challenges of public-private partnering, and stakeholder management and coalition building. It introduces the concept of mutual aid and encourages students to think about mutual aid in a unique context. The case asks students to analyze the dynamics of public-private partnering in the financial sector, assess the risks and benefits of centralized data repositories, and devise effective communication and persuasion strategies. The case prompts critical thinking about alternative approaches to data protection and encourages participants to consider the broader implications of leader decisions on public trust and the resilience of the financial sector in the digital age.

**Decision making disaster?: Process driven decisions in difficult circumstances
Ryan Davis & Alex Bolinger**

Clark, a dedicated and experienced healthcare professional, faces a career crisis after a series of unfortunate events. His journey includes working as an EMT and firefighter, a medical manager, and a cardiac nurse. Despite his competence, he encounters workplace challenges, including a clash with a new fire chief, a contentious experience at a plasma donation center, and a conflict with a cardiac surgeon. After a wrongful termination, Clark pursues a 15-month nursing program and becomes a successful cardiac nurse. However, a misunderstanding at work forces him into a travel nursing role, causing strain on his family. Clark now contemplates returning to work with a previous employer, renewing his current contract, accepting a full-time position in another city, or exploring new opportunities. The decision weighs heavily on his desire for career stability and maintaining a balance with his family.

**Does size matter? A pornographic distraction or body shaming – schoolteacher Kayla
Lemieux shows up for work
Natalie Assaad & Prescott C. Ensign**

This case covers the saga of Kayla Lemieux, a high school teacher who donned size Z breasts with firmly erect nipples at the start of the 2022 school year. It chronicles how the Oakville Trafalgar High School reacted to the situation as it was unfolding and prompts students to answer

the question: What should the board do? Legally, morally, responsibly the Halton District School Board in Ontario, Canada needs to arrive at what it 'can' (or cannot) do next? Are the school board's hands (perhaps) tied? Sometimes organizations like to be constrained – sorry cannot help, so even if it wanted to, it simply does not have authority to do so. The case goes through three possible options the school board could take: publish Lemieux's public health records to prove their breasts are naturally large, place restrictions on how someone is allowed to express their gender identity (assuming Lemieux's breasts are prosthetics), or if the board should simply allow Lemieux to express themselves how they see fit and return to work.

**“Food is medicine” – The Project Angel Food case
Yize “Jim” Zhang, Steve McGuire, & Yang Zhang**

Project Angel Food was founded in 1989. It provided a valuable and somewhat unique service: “food as medicine,” food designed for customers with serious illnesses. It had a generous donor base and committed volunteers, some Hollywood glamor, and plenty of media attention. Importantly, it also served a need that health insurers were willing to pay for: healthy meals for their chronically ill clients. Nonetheless, other organizations – for profit and nonprofit – prepared meals at significantly lower costs and could effectively complete health insurer contracts. Could Project Angel Food grow and thrive without the health insurance business? Was its current business model sustainable in the long term?

**Innovation in staffing and recruitment at Kaiser Permanente during and after the
pandemic
Edan Epstein**

The COVID-19 pandemic presented unprecedented challenges to healthcare systems in the US and throughout the world. Health care staff faced conditions of elevated uncertainty and risk, as well as material and equipment shortages, and constant change. In the short term, many simply left the profession and health care systems were challenged to provide adequate staffing. With the advent of new vaccines and better treatments, pent up demand for non-COVID related care added additional pressures on administrators to sustainably staff their hospitals and clinics. This case seeks to explore how one system, in particular, Kaiser Permanente adjusted to the crisis, focusing on operations at the Kaiser Permanente South Bay medical center, located in south Los Angeles.

**Introducing Costa Rica to wine culture: Vino Mundo
Sarah Lee and Jacob A. Massoud**

Vino Mundo was a restaurant and event space outside of San Jose, Costa Rica, that offered international cuisine and wine in a beautiful villa in the mountains. Guillermo Aguilar, founder and owner, was facing challenges with sustaining and growing his business in the wake of the global pandemic in 2022. Although he had a strong vision for Vino Mundo, he needed to revisit his strategic plan, especially in marketing. He had many decisions to make in 2023.

**It was just a kiss! - Sexism in professional women's soccer?
Virginia Bratton, Scott Bryant, & Myleen Leary**

Ted Lasso owns the Diamonds professional women's soccer team. Rebecca Jones, the new star striker of the Diamonds, walked into Ted Lasso's office holding her phone and scowling. “Have you seen this?” she exclaimed to Ted. Ted took a minute to watch the YouTube clip of his head coach kiss the captain of the team on the lips. And it wasn't a polite kiss. It was a passionate kiss that lasted way too long. “What are you going to do about this?” Rebecca asked. As the new owner of the Diamonds, Ted was responsible for the culture of the

organization and the final call on all personnel decisions. He decided to hold a press conference tomorrow to address the issues. What should Ted's message about the coach and the team be? How should Ted respond to the kiss? Ted notes the parallels between his coach's behavior and behavior of the Spanish Federation president, Luis Rubiales. The president kissed the team's star player, Jenni Hermoso, after the team won the World Cup this summer. Rubiales then publicly stated that was done in a moment of passion and was completely consensual. Initially the Spanish Federation backed him, but eventually the public outcry forced UEFA and the Spanish Federation to call for his resignation. After several passionate public speeches declaring his innocence and the plot against him a "Feminist witch hunt", he finally resigned.

Lost keys, tested loyalties: A banking branch's trial
Franco Olla & Stephen J. J. McGuire

The case explores the ethical and professional challenges within a leading financial institution, focusing on two central characters - Alexis, a Senior Premiere Banker, and David, the Branch Operations Manager. Alexis, amid relocating, loses her branch keys, a severe breach of the bank's strict security protocols. Caught in an audit, she misleads the auditor about the keys' whereabouts to avoid jeopardizing her significant quarterly bonus, crucial for her home-buying plans. David, upon discovering Alexis's predicament, faces a moral and professional dilemma. He must decide between supporting a valuable team member or adhering to the institution's stringent operational standards. His decision to report the truth, valuing ethical conduct over individual circumstances, highlights the critical importance of integrity in the banking sector. The case poses vital questions about balancing personal goals with professional ethics, managing employee performance amidst policy violations, and the role of leadership in upholding high ethical and operational standards.

Mars Air Systems: Alliance and growth opportunities in a long-standing niche industry
Edan Epstein

Mars Air Systems, based in Gardena, California, is a privately owned firm that manufactures air curtains, a highly specialized product that promotes indoor air quality, sanitation, climate control, and energy savings. Led by owner-CEO, Steve Rosol, Mars is a leader in the air curtain industry segment. Though traditionally slow growing, the future may bring significant changes. This case illustrates how a manufacturer of traditional, yet specialized products in a niche industry develops and maintains their brand reputation, operational efficiency, and competitive advantage while at the same time expanding their industry's relevance through collaboration with their direct competitors and through their professional association. Mars Air Systems exemplifies the many privately held business to business firms that provide necessary products and services with which students and the general public may be unfamiliar.

Organizational diagnosis of Upkeep Technologies Inc.
Aisha Groce, Benjamin Komeh, Ching Yi (Joyce) Ma, Sterling Lewis, & Urvashi Sinha

UpKeep Technologies Inc., a prominent player in the Computerized Maintenance Management System (CMMS) sector, specializes in delivering cutting-edge solutions for maintenance management. The company offers a comprehensive suite of tools designed to optimize asset maintenance and streamline operational processes. With a focus on technology-driven solutions, the Company serves various industries, providing a user-friendly platform for efficient maintenance operations. This report aims to conduct a comprehensive analysis of the Company's organizational dynamics. The objective is to gain a holistic understanding of the company's current position, emphasizing strengths, challenges, and areas requiring improvement. The analysis covers various facets, including business strategy, organizational

culture, marketing, financial performance, information systems, and website performance metrics. Each section provides insights into specific aspects crucial to the overall functionality of the company, contributing to a nuanced view of its operations.

Relationship marketing of Caterpillar: How to win the battle In Mongolia Chutamas Tavivongpaiboon & Tserennyam Sukhbaatar

Caterpillar's remarkable business expansion story in emerging market began when Wagner Equipment was awarded the title of the first Caterpillar dealer in Mongolia as the country transitioned from the socialism to democracy. It recounts the moment when Caterpillar identified a revenue stream opportunity in the emerging market and entrusted Wagner Equipment Co. to spearhead the entry into the mining equipment sector in Mongolia. As one of the Fortune-500 companies, the Caterpillar has its own unique business model and 156 independently owned dealers in 192 countries. By identifying, analyzing, and implementing effective marketing strategies, Cat emerged as a critical player in the country's construction and mining equipment sector, creating challenges for competitors seeking to replicate their success. It also plays a vital role in fostering the development and growth of Mongolia's economy. With being the first to enter, what strategic measures would Caterpillar undertake to secure its position as Mongolia's leading mining equipment company? The lessons learned from pioneering this emerging market hold valuable insights for Caterpillar and other companies seeking success in uncharted territories.

Saving Yuca's restaurant: An effort to makes ends meet Yize "Jim" Zhang, Christian Casados, Damon Dees, Elisabeth Low, Griselda Nuno, Hamza Waqar, Luz Perez, Povrotanak Cheatha, John Cooper, & Steve McGuire

Yuca's award-winning restaurant is an icon in the Los Angeles area. Nonetheless, it faces many challenges to get out of the red and become profitable: the supply chain, marketing, human resource management, finances, and others.

Shan - From humble origins to global spice dominance Faria Shaikh

Shan Brand, a global leader in the spice industry, embarked on a remarkable journey from its humble beginnings in Pakistan to becoming a household name worldwide. Founded in 2024, Shan started as a small spice shop in Karachi Pakistan. Over the years, it expanded its product line, quality, and distribution network, gaining recognition for its authenticity and flavor. One of the key factors behind Shan's success was its strategic approach to international expansion. Through innovative marketing campaigns, social media engagement, and a deep understanding of diverse consumer preferences, Shan effectively penetrated global markets. It not only introduced Pakistani flavors to the world but also adapted its products to cater to various cultural tastes. This case study explores Shan's remarkable growth story, focusing on its international ad campaigns, global marketing strategies, and social media marketing efforts. It delves into the challenges and opportunities Shan encountered on its journey to becoming a global spice leader.

Starlux Airlines flying high after the Chairman ouster at EVA Airways Caroline Chen & George Whaley

After his April 2022 appointment to Chairman of the Evergreen Group, holding company for all Evergreen entities, including EVA Airways ("EVA"), the founder Chang Yung-Fa's ("YF") son-in-law Cheng Shen-chi ("Cheng"), worried he would not be able to quell the infighting among YF's four sons for the strategic direction and control over the company's structure. Less than two

months after YF's youngest son, Chang Kuo-Wei ("KW") was removed as Chairman of EVA in 2016, he formed Starlux Airlines ("Starlux") outside the Evergreen Group structure, and Starlux became one of EVA's primary competitors. Cheng attempted to use his position as elder in Taiwanese family to reconcile his four brothers-in-law, and evaluate Evergreen Group from a strategic management and family business perspective. Students are asked to evaluate the internal and external ramifications of ousting KW from EVA and assess whether the creation of Starlux negatively affected EVA.

The difficult entrepreneurial journey of a social advocacy nonprofit in Long Beach
Claudia Barrulas Yefremian

SugarWatch was a Long Beach based nonprofit organization founded by Brent Walmsley, a K-12 English teacher, in 2015. The organization's mission was to engage the community at three primary levels. First, as a partner to K-12 schools to raise awareness of the dangers of sugar in children's diets. Second, as a partner to local produce vendors to establish a mobile farmer's market to supply the food deserts in Los Angeles County with fresh produce at affordable prices. Finally, as a social advocate to raise awareness for the benefits of a balanced diet and contribute to policy change. The idea to launch SugarWatch started when Walmsley began his own health transformation and committed to an ambitious 800-kcal/day diet to lose weight. Walmsley was a charismatic and inspiring leader. His passion for helping disadvantaged communities and SugarWatch's mission attracted many volunteers. According to Walmsley, one of the organization's high points was a campaign launched by SugarWatch against the reintroduction of sugar-rich flavored milk in the children's menu at the Los Angeles Unified School District (LAUSD) in 2016. However, at the end of 2018, Walmsley announced that his circumstances had changed, and he could no longer lead SugarWatch. Walmsley and the board had to determine how (and if) SugarWatch had the fortitude to carry on.

The duality of America's talk show sweetheart: Drew Barrymore's decision to return daytime show to air amid writers' strike
Deveena Bharat, Destynie Sewell, & Prescott C. Ensign

This case explores the issue of Drew Barrymore announcing her decision to return her daytime talk show, *The Drew Barrymore Show*, to air amid the 2023 writers' strike. After receiving significant backlash, Barrymore reversed her decision and stated she would not return to air until the strike was resolved. The case brings up two sides to the ethical dilemma faced by Barrymore. On one side, should Barrymore have stood in solidarity with the striking writers and halted the show's return until the strike was resolved, as her long-time viewers and the WGA members felt she should have? On the other side, did she make the correct decision as she had a contractual obligation to host and faced potential legal ramifications for not fulfilling her duty, as well as the fact that there were hundreds of non-striking workers whose jobs were on the line?

Underpaid?
Rehnaz Karanjia, Alicia Pino, & Alex Bolinger

Vivian enjoyed working as a senior project manager at Study Solutions, a small education company that provided great flexibility and work-life balance. However, a former colleague tipped her off to a much higher paying job opportunity at a fast-growing tech startup. Vivian researched salary data and found she was significantly underpaid at her current role. She now faces the decision of whether to leverage the new job offer to negotiate higher pay at Study Solutions, or leave for the new opportunity, sacrificing influence and flexibility, but gaining upward mobility and compensation. The case highlights issues of pay transparency, equity, flexibility, and weighing intrinsic rewards against compensation. It is best suited for

undergraduate or MBA-level courses focusing on organizational behavior, negotiation and decision making, human resources, gender studies, or interpersonal communication.

**Was the acquisition of Twitter Inc. by Elon Musk a taxable transaction?
Gretchen R. Lawrie & John R. Cooper**

This case study reviews the facts of Elon Musk's acquisition of Twitter, Inc. The case presents an opportunity to reinforce the student's understanding of the complex US corporate reorganization provisions. The case study leads to the question: What were the US tax and non-tax consequences of Elon Musk's acquisition of Twitter for Twitter, Twitter's shareholders, and Elon Musk?

**What is the best FDA drug approval path: Flexible drug development or conflict resolution?
George Whaley**

ABC, Inc. was a small biopharmaceutical firm going through the usual phases of drug development with the U.S. Federal Drug Administration (FDA). The FDA advised ABC, Inc. (ABC) to conduct additional clinical trials and did not approve the drug candidate, IDXBLA, for sale and distribution. This delay in anticipated FDA approval of IDXBLA led ABC to substantially downsize the firm's workforce, reduce company expenses, and enter the FDA's formal conflict resolution process. Firms did not usually prevail at this late stage of the FDA conflict resolution process. Hence, the understaffed VP of Regulatory Affairs reflected on ABC's past strategic decisions concerning IDXBLA and adversarial posture toward the FDA for predicting the outcome and viable options in strategy, leadership, and human resources.

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