PROGRAM AND PROCEEDINGS
WESTERN CASEWRITERS ASSOCIATION CONFERENCE

Held on March 12, 2026

Hilton Santa Fe Historic Plaza, Santa Fe, New Mexico

Edited by Judy Esquibel

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TABLE OF CONTENTS

PRESIDENT'S WELCOME 3
WCA 2026 SCHEDULE 4
WCA 2026 TABLE ASSIGNMENTS 5
ABOUT THE WESTERN CASEWRITERS ASSOCIATION 6
HISTORY 6
2025 – 2026 WCA OFFICERS 7
2026 WCA REVIEWERS 8
WCA AWARDS PROCESS 9
2026 Awards 9
HOW TO GET THE MOST OUT OF THE CASE DISCUSSION SESSIONS 10
PURPOSE OF WCA CASE ROUNDTABLE DISCUSSIONS 10
PREPARING FOR CASE ANALYSES & FEEDBACK 10
DUTIES OF PARTICIPANTS IN THE CASE ROUNDTABLES 10
Table Leaders: 10
Recorder: 11
Case Author(s): 11
Discussants and Participants: 11
AFTER THE CONFERENCE 11
PUBLISHING YOUR CASE 12
CALL FOR CASES, NOTES, AND ARTICLES: JCRI 12
CALL FOR CASES: CRJ 13
WCA 2026 ACCEPTED CASE SYNOPSES 14
NOTES 17

PRESIDENT'S WELCOME

Dear Colleagues,

With immense pleasure, my fellow WCA officers and I welcome you to the WCA conference in Santa Fe, New Mexico. We are excited to meet those of you new at the conference and to mingle with new and old friends. We look forward to the value we gain through shared insights and productive collaboration 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 create an effective, low-risk environment for students to apply concepts, test ideas, and assume leadership roles informed by their own experiences. I value case teaching because these exchanges enrich the classroom and allow me to learn alongside my students.

Our WCA is dependent on your involvement and the contributions of our supporters. Judy Esquibel has put together an innovative and impactful program. Julian Vogel, 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. Franziska Renz will take on the role of Program Chair for 2027, and I look forward to another exciting program. Thank you to all for 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.

Kind regards,

Yvette M Bendeck, Ph.D.

President, Western Casewriters Association

WCA 2026 SCHEDULE

Mountain Standard Time

7:00-8:00 Breakfast | Location: Mesa A&B

8:30-8:45 Welcome & President's Welcome | Location: Mesa C

8:45-9:15 Making Your Consulting Case (MYCC) Competition
Julia Ivy, Executive Professor of Strategy and International Business at the D'Armor-McKim School of Business, Northeastern University

9:15-9:30 Roundtable Etiquette & Feedback Process

9:45-10:00 Break

10:00-10:30 Key Note – Guest Speaker
Presentation: Your Matter is My Meaning: In-form-ation in the Age of AI
Dr. Mary F. Rice, Associate Professor of Literacy—University of New Mexico

10:30-11:00 Case Overview Presentations

11:00-11:30 Roundtable (Case 1)

11:30-12:00 Roundtable (Case 2)

12:00-1:00 Lunch | Location: Mesa A&B

1:00-2:00 Roundtable (Case 3)

2:00-2:15 Break

2:15-2:30 Awards Presentation and Closing
Best Case
Best Mentored Case
Best Reviewer
Winner in the "Making Your Consulting Case" competition

2:30-3:00 WCA Business Meeting
Treasurer's Report
Journal of Case Research and Inquiry
Select Program Chair-Elect 2027
Other New Business

Participants are invited to attend the WAM opening session, fireside chat, and joint reception.

WCA 2026 TABLE ASSIGNMENTS

Table 1
Franziska M. Renz
Julian U. N. Vogel
Stuart (Stu) Rosenberg
Duane Helleloid
Yvette Bendeck
Rebecca Frankel

- Choo Choo Choked? The Slow Progression of the California High-Speed Rail -
- Political and Ethical Vulnerabilities at the Federal Reserve

Table 2
Rebecca Broady Treadway
Lorraine Taylor
Juanita Trusty
Tyler Burch
Julia Ivy
Judy Esquibel

- Hiyoshiya-Value Creation and Preservation of Cultural Heritage
- Quiet Please: Spectator Behavior at the 2025 Ryder Cup
- Zipline's Next Flight: Managing Dual Growth Strategies in Drone Delivery

Table 3
Nathanael (Nate) D. Peach
Deborah Walker
Soyuz Bhattarai (student author)
Kathryn Aten
Craig Seal

- Evaluating the Economic, Social, and Cultural Impacts of an Arts and Culture Program in a Rural Economy
- When a Good Hire Fails: Lessons from a Low Offer
- Sustaining the Fleet: Organizational Decision-Making in a Complex Environment

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
Kathryn Aten
Julian Vogel

2025 – 2026 WCA OFFICERS

President: **Yvette Bendeck**, University of Houston-Clear Lake

Program Chair: **Judy Esquibel**, Naval Postgraduate School

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

Webmaster: **Arun Aryal**, California State University, Los Angeles

Program Chair Elect: **Dr. Franziska Renz,** California State University, Sacramento

Past President: **Julian Vogel**, San José State University

2026 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
Soyuz Bhattarai
Jeffrey Kent
Jasmin Lin
Prescott C. Ensign
Stuart Rosenberg
Lorraine Taylor
Rebecca Broady Treadway
Juanita Trusty

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.

2026 Awards

Best Case Award

Best Mentored Case Award

Best Reviewer Award

Winner in the "Making Your Consulting Case" competition

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 in 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, Eric Dolansky at edolansky@brocku.ca if they have questions.

WCA 2026 ACCEPTED CASE SYNOPSES

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.

Choo Choo Choked? The Slow Progression of the California High-Speed Rail
Franziska M. Renz and Julian U. N. Vogel

The California High-Speed Rail is one of the most public and most controversial infrastructure projects in California, the United States, and potentially the world. Public opinion was all aboard with the project at its enthusiastic beginnings in 1996 when the California High-Speed Rail Authority was only funded to make way for the project, and when voters gave the green light in 2008.

Soon after, problems began to arise, and planning challenges, legal disputes, political turmoil, and even a pandemic and global supply chain disruptions threatened the progress and completion of the project. Just when the project started to take up steam again, competition came from the East. Complex finances that never seem to quite cover expenses additionally soured the judgement of the public about the high-speed rail.

What can be done for the California High-Speed Rail to finally leave the station?

Political and Ethical Vulnerabilities at the Federal Reserve
Stuart Rosenberg and Richard Roberts

During 2025, the Federal Reserve was operating in an environment of political and ethical conflict. The political conflict stemmed from President Trump, who was critical of the Fed for its lack of willingness to reduce interest rates, which he believed would increase borrowing and drive economic growth. He openly ridiculed the Fed Chair, Jerome Powell. Powell was cautious about reducing interest rates in the face of price increases that had not come down in the first year of Trump's second term. His concern was that lower rates could stoke inflation.
The ethical conflict came from the scrutiny of a number of individuals at the highest levels of the Fed who had been accused of improprieties in securities trading. Four senior officials were forced to resign between 2021 and 2025, and then in November 2025, Atlanta Federal Reserve Bank President Raphael Bostic also announced that he was stepping down. In Bostic's case, however, he had been found by the Office of the Inspector General of the Federal Reserve to be innocent of ethical misconduct. His resignation might have been due more to a perception of vulnerability within the Fed, given the public pressures that it was facing.

The novelty of this case is that it introduces the concept of perceived vulnerability as a tool for analyzing leadership behavior in independent institutions.

When a Good Hire Fails: Lessons from a Low Offer
Soyuz Bhattarai and Jasmin Lin

In November 2022, James Walker, a recruitment consultant at Macro Recruitment, managed a placement between a small industrial supplier and mid-career sales professional Daniel Roberts. After guiding interviews and aligning expectations, Walker was shocked when Roberts called angrily, claiming that Turner, the client, had sent a significantly lower offer directly to Roberts, bypassing Walker entirely. Suddenly, Walker faced a critical decision: should he push Turner to revise the offer, convince Roberts to stay open despite feeling undervalued, or step back entirely to protect his credibility while trying to repair trust and realign expectations? The case highlights how breakdowns in offer communication and fairness perceptions can destabilize professional relationships and derail negotiations. What should a recruiter do when one unexpected decision threatens to unravel weeks of relationship-building and the trust at the center of it?

Hiyoshiya: Value Creation and Preservation of Cultural Heritage
Rebecca Broady Treadway

Hiyoshiya was a fifth-generation Japanese umbrella maker located in the old historic capital, Kyoto. In the early twenty first century, the American umbrella had long established its place in Japan as practical and easy. The progressive westernization of Japan and the dissipation of cultural practices meant critical times for Hiyoshiya and other Japanese heritage craft companies. Hiyoshiya with its intricate process of making the beautiful paper umbrellas was in the ravages of complete disruption. In 2005, Kotaro Nishibori took the reins of the family-owned business. Passionate and innovative, Nishibori desired to create value in the minds of consumers. Hiyoshiya's product was more than an umbrella, it was the inherent beauty of Japanese culture and values as represented through artisan craftsmanship. Nishibori longed to help fellow Japanese artisan craft businesses of all types sustain their crafts and thrive. How would Nishibori create value and allow Hiyoshiya to evolve. Would he be able to foster the preservation of Japanese artisan craftmanship on a larger scale?

Quiet Please: Spectator Behavior at the 2025 Ryder Cup
Lorraine Taylor

Since 1979, the rivalry between US and European golf teams had resulted in a spirited competition in the modern era of the Ryder Cup. However, excitement turned to chaos and abuse at the 2025 Ryder Cup that was held in New York. American fans broke etiquette and displayed rude behavior and directed profane chants at the European players. Members of the golf community chimed in on the disruptive playing environment as being misaligned with the underlying values of golf and the standards of a gentleman's game. The President of the PGA, Don Rea Jr., issued a public apology to the European players and had to consider how future golf events could proactively implement risk management and crisis communication plans to maintain decorum in the playing environment.

Evaluating the Economic, Social, and Cultural Impacts of an Arts and Culture Program in a Rural Economy
Nathanael D. Peach and Deborah Walker

Through the eyes of Tommy Crosby, Economic Opportunity Manager for the City of Durango, Colorado, this case introduces students to the economic and cultural impacts of a local public arts funding program: the City of Durango's Lodgers' Tax Arts and Culture Program (LTAC). In 2021, Durango voters approved allocating 14% of lodgers' tax revenues to arts and culture. Between 2022–2024, the city awarded 109 grants totaling over $1.55 million. The case teaches students how to analyze the effects of such funding on a local economy using economic

multiplier analysis (direct, indirect, and induced effects) and social and cultural capital frameworks. Students learn about both tangible economic outcomes (changes in local employment and incomes) and intangible community benefits (participation in creative activities, networking, and social cohesion) from the city's program. They also learn economic theory that relates to producing artistic outcomes. For example, how local artistic expression can generate spillover benefits to the community.

Zipline's Next Flight: Managing Dual Growth Strategies in Drone Delivery
Juanita Trusty and Seongwon Choi

Zipline is a U.S. drone delivery company that began delivering medical supplies to remote areas of Rwanda in 2016. Since then, it has built and operated logistics centers for drone delivery of medical supplies in Rwanda, Nigeria, Ghana, Kenya, Côte d'Ivoire, and Japan. More recently, the company began to expand its domestic operations with retail and food drone deliveries for companies such as Walmart and SweetGreens in 2024 (Zipline, 2025b).

In November 2025, Zipline was awarded a $150 million grant from the U.S. State Department to expand its logistics operations in African countries. This was one of the first such grants under the "America First Foreign Aid Policy" after the United States Agency for International Development (USAID) was dismantled and foreign aid was slashed in the early months of President Trump's second term. The grant would expand Zipline's AI and robotics infrastructure in five African countries, creating up to 1,000 new jobs. African countries will pay up to $400 million in utilization fees.

Sustaining the Fleet: Organizational Decision-Making in a Complex Environment
Kathryn Aten and Ann Gallenson

This case examines sustainment decision-making within the U.S. Navy during a large-scale training event designed to prepare forces for operations in contested environments. The case follows Captain Brad Ryan, a senior Navy officer responsible for leading the organization charged with resupply and sustainment planning in the Indo-Pacific region, as he reflects on the outcomes of a recent exercise involving a mix of active-duty and reserve personnel. During the event, Ryan's organization struggled to develop a shared understanding of supply availability, constraints, and risk across a complex, multi-echelon enterprise. Information was distributed across multiple systems, coordination across organizational boundaries was uneven, and uncertainty about roles, authority, and processes shaped how sailors interpreted constraints and proposed alternatives. Although teams adapted through initiative and informal problem-solving, these efforts varied in visibility and sustainability. As Ryan looks ahead to a future training event—and the possibility of real-world operations in which logistics can no longer be assumed to be secure—he faces a challenge in determining how to strengthen information integration, coordination, and decision-making within his organization without slowing execution or undermining established command relationships.

NOTES