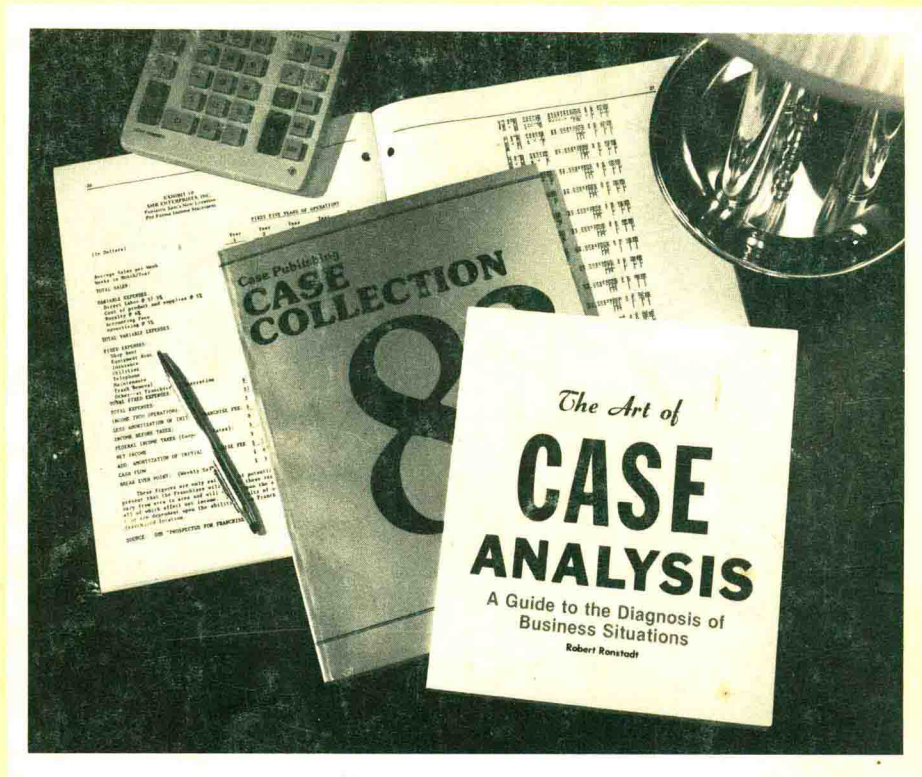


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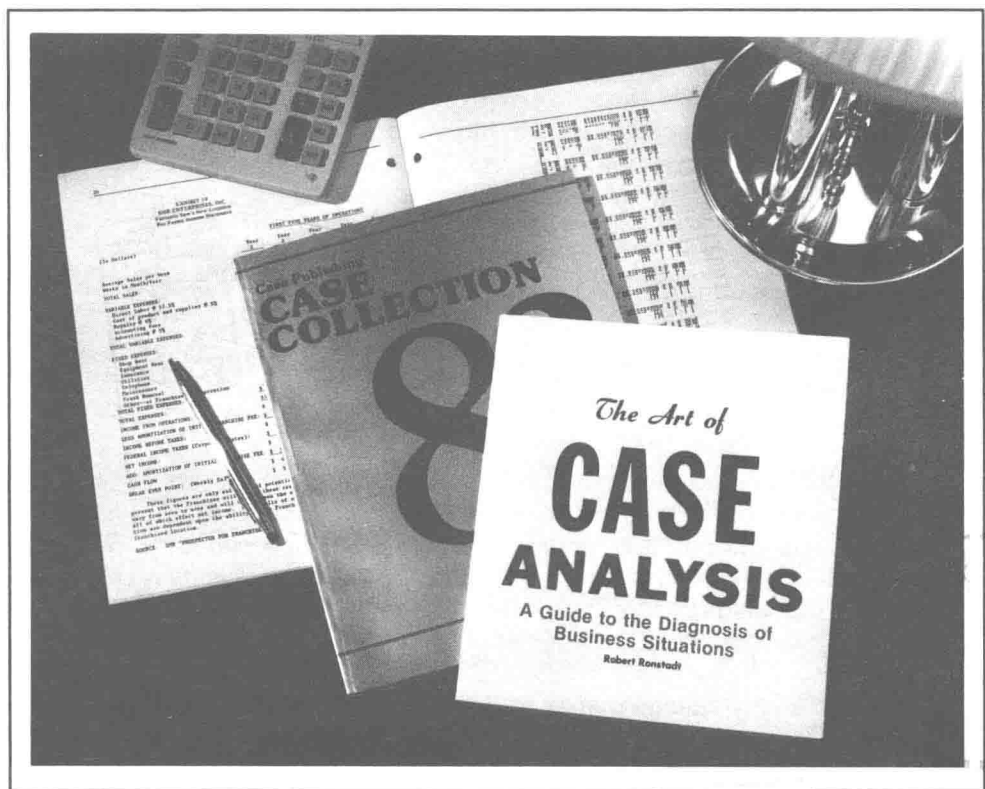
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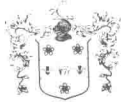
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Foreword

This bibliography of cases contains more than 500 annotated listings of quality cases and notes that are ready for distribution by Lord Publishing. Cases are reviewed by professional editors and, where possible, academicians in the field, and are selected on the basis of pedagogical objectives and usefulness, written exposition, market need, uniqueness and overall quality.

This publication has been designed for the convenience of case users. Past experience with other bibliographies and detailed case reviews has taught us the fine line between too little versus too much information. We have also tried to avoid unnecessary complexity and we have indexed all of our cases, authors, case numbers, key words, industries, curricular areas, and more in a way which will "ease the pain" for the case teaching professor searching for the perfect case suited to his or her pedagogical objective. I believe our reviews and abstracts strike the appropriate balance on these grounds — and that sufficient information is provided herein — simply and clearly, always with an eye toward excellence.

Rebecca Lord
Publisher

Acknowledgments

Our thanks to David Crocker, Crockergraphics of Needham, Massachusetts, who proved to be a master at data manipulation. His unending questions and devotion to this project are very much appreciated.

ZBR Publications of Woburn, Massachusetts, enjoys its recent appointment by Inc. Magazine as "Growing Concern #395" among the country's top 500 Private Companies. It's no wonder they've gone so far — they're that good.

And a very special thanks to Bob, Marlene, Herm, Irene, and Laurel.

How to Use This Bibliography

This bibliography contains a variety of teaching materials, cases, accompanying teaching notes, technical notes, industry notes, conceptual notes, films, slides, etc. Cases are divided among ten primary curricular areas, including Accounting and Control, Business Policy, Entrepreneurship, Finance, General Management and Introduction to Business, International Business, Marketing, Organizational Behavior, and Public Policy.

Cases are arranged alphabetically in the first Section of the book according to the first major word (omitting articles such as a, an, and the). Cases which may be used in more than one curricular area are so noted at the end of the case abstract under the heading "Other Curricular Areas".

Each case number has its own number with a two-letter prefix indicating the primary curricular area in which the case is most suited, i.e., BP-#### for Business Policy, AC-#### for Accounting and Control, etc.

Teaching Notes are available for the majority of cases. When available, the teaching note number appears in the annotation. Teaching Notes have their own separate number with the suffix "TN". Although they appear as part of the case annotation, they must be ordered separately.

Each case annotation contains a number of items. "Number of Pages" refers to the total number of pages contained in a case. "Time" refers to the year in which the case is set. Items such as "Industry", "Based on", "Level", and "Location" are self-explanatory. When a case is especially appropriate for an exam or a report, that information is included under "Course Use and Positioning", along with other notes from the author regarding the potential use of the case. Other comments and suggestions for classroom use appear in "Other Information".

The most helpful information in our case annotations is contained under "Pedagogical Objectives" where an instructor can quickly determine if a case is suited to a particular course, and/or if there is a "fit". The "Synopsis/Situational Context" presents a short overview of the case, and a flavor for its content. "Key Issues/Key Words" are indexed, and provide a one or two word quick reference for scanning.

All other Notes (Conceptual Notes, Industry Notes and Technical Notes) appear alphabetically under "N" for Notes.

We have found that the second section of this bibliography, the Indexes, most helpful. If you are looking for a Business Policy case, see the Curricular Areas Index. If you prefer the work of a particular author, see the Authors' Index. If you require a case in an area not specified as a primary curricular area, i.e. "computers", or "forest management", see the Key Words Index. If you need a quick reference as to the price of each case, see the Alphabetic Title Index or the Numeric Index.

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Adler Oil Company

Author: M. Edgar Barrett, Mary Pat Cormack

Case Number: BP-0328

Key Issues: Mergers and acquisitions, valuation of a company, oil reserve valuation.

Synopsis/Situational Context: This case should be used with MacLeod Petroleum Company. Both cases are set in February 1983 when representatives of the two companies were in the throes of negotiating the terms they are willing to give to acquire Adler, MacLeod and Adler negotiations are then held.

Pedagogical Objectives: These cases provide the students the opportunity to experience a simulated negotiation session in which they act as active members of an ongoing negotiation process. As such, they serve to allow the student to build upon and/or improve their skills in areas such as financial analysis, industry analysis and interpersonal (negotiating) skills.

Number of Pages: 18, 10 Exhibits

Industry: Petroleum

Based on: Library Research

Disguised: Yes

Level: All

Time: 1983

Location: U.S.

Other Information: This is a fine negotiation case; see synopsis/situational context above. MacLeod Petroleum Company is BP 0331.

Teaching Note: No

Other Curricular Areas: Finance

Agri-Bin Company

Author: Yunus Kathawala

Case Number: CO-0406

Synopsis/Situational Context: This case examines a company that has recently enacted automation or a change in their production process. The process has altered significantly the cost of standard time and efficiency. However management has failed to translate these savings in terms of standard costs and proper allocation of overhead, thereby losing most of the benefits of the new system.

Number of Pages: 16 pp.

Level: Undergraduate

AHL Inc: Portfolio of Computer-Based Information Systems Development Center

Author: Robert M. Alloway

Case Number: OB-0261

Key Issues: Computer systems, project management and planning, organizational theory.

Synopsis/Situational Context: The case presents four very different projects in one company setting; they differ in uncertainty/complexity of project objectives and the differentiation/integration of the organizational context of each project. They defy DSS/MIS classification yet clearly differ in risk, source of risk, size, technological sophistication, etc. Yet, each and every project should be implemented successfully. Who and how do you define success? These four projects look like they will fail; what would you do to insure success?

Pedagogical Objectives: The contingent design of the project must be based upon the uncertainty/complexity of the objectives and differentiation/integration of the organizational context. Most students are looking for the one right project design and project management manual. Most practitioners are also searching for the same holy grail. DSS advocates and others have just begun to recognize the necessary differences in project design. The case is intended as a confrontation with the Structured Design approach.

Number of Pages: 15, 9 Exhibits

Industry: Primary metals

Based on: Field research

Disguised: No

Level: Graduate, Executive Education

Time: 1976

Location: U.S.A.

Teaching Note: No

Other Curricular Areas: MIS, DP

Alcoholics Anonymous

Author: Robert Ronstadt

Case Number: BP-0012

Key Issues: Strategic Planning, Policy Formulation and Implementation in a non-profit organization.

Synopsis/Situational Context: A non-profit organization in the health industry must decide what, if anything, to do about new shifts in membership and other environmental changes.

Pedagogical Objectives: To discuss the serious social problem which alcoholism presents; to identify significant environmental changes (more women, more young people, more dual addictions); to propose ways to accommodate them within the AA tradition; and to study a non-profit organization, to see how it compares with a for-profit one, particularly in a policy setting and implementing sense.

Course Use and Positioning: Current experience with the AA case is limited to Business Policy classes. However, the case can fit nicely into any course dealing with environmental analysis or general management. The AA case can also be part of any course dealing with current problems and issues of managers today. The rise of courses concerning the management of health delivery systems is another possible home for the AA case.

The positioning of the AA case within Business Policy courses is flexible depending on the issue(s) you wish to stress. Possibilities are:

- 1) Early in the term to emphasize the questions of "what business is this organization in" and "what business(es) should it be in?"
- 2) Somewhat later in the semester if you wish to focus on writing objectives policies, and plans for a non-profit organization.
- 3) Either early or later in the term depending on where you inject extensive environmental analysis into your course.

Number of Pages: 30 pp, 14 Text

Industry: Healthcare

Based On: Field Research

Disguised: Partial

Level: Undergraduate, Graduate

Time: 1980

Location: Unspecified

Other Information: This is the first case ever written about AA.

Teaching Note Number: BP-0082TN

Number of Pages: 12 Pages

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Assignment Questions; Board Plan; Teaching Strategy; Some Other Observations; Analysis

Other Curricular Areas: Business and Society, Introduction to Business.

Alexander D. Hobart

Author: Rebecca Friedman

Case Number: GM-0018

Key Issues: Ethics, fraud

Synopsis/Situational Context: A business manager who has received considerable help and support from her boss, is asked to commit fraud for him.

Pedagogical Objectives: Students must examine their own ethical positions, and evaluate the consequences of whatever option they decide to pursue—moral, legal, and career.

Course Use and Positioning: The situation surrounding the Alexander D. Hobart case is designed to present ethical considerations that frequently confront managers. Many articles and books have been written relating to the role of the manager in modern society. That role, increasingly, has to deal with the responsibility of managers to society.

Number of Pages: 3 pp, 1 exh.

Industry: Medical/psychiatry

Disguised: Yes

Level: Undergraduate

Time: 1974

Location: Northeast

Teaching Note Number: GM-0093TN

Number of Pages: 3

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Key Issues; Analysis; Questions; Discussion; Classroom and Blackboard Technique; Epilogue

Other Curricular Areas: Business, Society and Ethics

The American Aluminum Corporation

Author: J. Frederick Truitt

Case Number: IB-0021

Key Issues: Transfer pricing, private foreign direct investment, U.S.-Canada relations.

Synopsis/Situational Context: A recent MBA must determine and justify a new transfer price for petroleum coke which is being shipped from the corporation's Canadian subsidiary to its U.S. aluminum smelting company.

Pedagogical Objectives: Class discussion can focus on the technical aspects of transfer pricing between company subsidiaries located in different countries, and on the broader issues of U.S.-Canada investor relations and what constitutes "good" behavior.

Course Use and Positioning: This case was developed for use in an advanced undergraduate course in international business management or an MBA level course in international business. The case will contribute to the student's understanding of the difficulty of international transfer pricing decisions in an environment which combines the managerial imperative of profit maximization, and absence of an "appropriate" arm's length market price, the presence of vigilant income tax authorities, and the existence in the host society of a critical social/political attitude towards foreign investment.

Number of Pages: 6 pp, 3 exh.

Industry: Aluminum

Disguised: Partial

Level: Graduate

Time: 1974

Location: U.S.—West Coast

Teaching Note Number: IB-0101TN

Number of Pages: 5

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Supplementary Reading; Analysis; Discussion Questions

Other Curricular Areas: Finance

American Optical Co.— Soft Contact Lens Division

Author: Ashok Rao

Case Number: GM-0272

Key Issues: Autonomous Work groups in High-Growth Manufacture; Capacity

Synopsis/Situational Context: The company plans to market a new product for which FDA approval has been received. The market is expected to be large, and the company expects to carve out a large share. The product has passed prototype tests. The production facility is located within a tight labor market. The company resorts to job enrichment to reduce turnover. They also find it an attractive approach to increase capacity in small "chunks". This provides flexibility which is needed during start-up.

Pedagogical Objectives: Autonomous work groups functioning; importance of training; benefits of autonomous work groups vs. traditional flow shop.

Number of Pages: 9

Industry: Soft-Contact Lens

Based on: Field research

Disguised: Yes

Level: Graduate and Executive Education

Location: U.S.A.

Teaching Note Number: GM-0271TN

Number of Pages: 13

Teaching Note Outline: Overview; Purpose of Case/Pedagogical Objectives; Suggested Assignment Questions; Analysis; Trade-off Analysis

American Safety Razor Company (A)

Author: Ralph Biggadike, Dennis Schafer

Case Number: BP-0015

Key Issues: Corporate strategy, razor blade industry, buyout.

Synopsis/Situational Context: The new CEO of American Safety Razor Company (ASR), having recently acquired the ailing company in a leveraged buyout, considers his corporate strategy options: getting out of the razor industry, getting into its mainstream or competing in the eddies.

Pedagogical Objectives: After looking at industry figures, ASR figures, and ASR's present strengths and weaknesses, students must devise an all-over corporate strategy for this newly acquired company.

Course Use and Positioning: This case is rich in data, both on the industry and the company. It has been used as a report case.

Number of Pages: 32 pp, 16 exh.

Industry: Safety razors/consumer products

Based On: Field research

Level: Undergraduate, graduate

Time: 1977

Location: Unspecified

Teaching Note: No

Ammco Tools, Inc.

Author: Ram Charan, Lawrence Christian, Charles S. Wilson

Case Number: BP-0204

Key Issues: Strategic planning, duties of CEO, industry analysis.

Synopsis/Situational Context: The case describes the operations of a small (\$16 million, 350 employees) family-owned company in the automotive aftermarket business. It contains much data about company philosophy, policy, personnel and finances, in addition to industry data. Chief among company philosophies is the desire for modest growth.

Pedagogical Objectives: The case provides students with an opportunity to comprehend and analyze the totality of a small company. It also demonstrates the relationship between a CEO's philosophy and the behavior of the organization he heads. Students must assess company policies and priorities in the light of overall industry trends, and come up with a "future agenda".

Course Use and Positioning: The case can be taught in either one or two sessions toward the start of a Business Policy course for students unskilled in case analysis. A film is available (see below) which illustrates further issues of interest to MBA's, including how an MBA can be successful in a small firm such as AMMCO.

Number of Pages: 25, 10 exh., 1 app.

Industry: Automotive Aftermarket

Based On: Field research

Disguised: No

Level: Undergraduate, graduate

Time: 1973

Location: Chicago

Other Information: A 55-minute movie, in two parts, is available—illustrating both personalities and issues.

Teaching Note Number: BP-0205TN

Number of Pages: 12

Teaching Note Outline: Purpose of the Case/Pedagogical Objectives; Suggested Assignment Questions; Teaching Strategy and Case Analysis; Board Plan; Outcome Information; Additional Observations Tables

Amoco (U.K.) (A)

Author: M. Edgar Barrett, William H. Millard

Case Number: BP-0056

Key Issues: Government policy, petroleum industry, business and society, United Kingdom, international business, strategy formulation.

Synopsis/Situational Context: Summer 1976. This case focuses on a particular problem faced by the senior management of Amoco (U.K.). The fifth round of applications, review and licensing with respect to permission to explore for oil and gas in the North Sea would soon be underway.

Pedagogical Objectives: Students will understand in depth some of the options which governments of oil-producing companies can exercise when dealing with private oil companies. The case details a recent policy shift by the U.K., as well as historical information about North Sea development and Amoco's involvement.

Course Use and Positioning: The richness of this case lends itself to two classroom sessions, if desired. There is no shortage of issues, and instructors must be sure the class does not get bogged down on just one.

Number of Pages: 30 pp, 5 exh.

Industry: Oil and gas

Level: Graduate, exec. ed.

Time: 1976

Location: U.K.

Other Information: An update is available

Teaching Note Number: BP-0078TN

Number of Pages: 15

Teaching Note Outline: Purpose of the Case/Pedagogical Objectives; Opportunities for Student Analysis; Suggestions for Classroom Use; Suggested Questions; Amoco (U.K.): An Update; Exhibits (2)

Other Curricular Areas: Public Policy, International Business.

The Anaconda Smelter (A)

Author: M. Edgar Barrett, Mary Pat Cormack

Case Number: BP-0172

Key Issues: Copper industry, oil and gas industry, corporate responsibility, industry analysis.

Synopsis/Situational Context: The case deals with a decision faced by top management at the Atlantic Richfield Company (ARCO) in 1980, concerning the firm's copper smelting operation in Anaconda, Montana. It discusses the copper industry, the environmental regulations affecting the industry, and the decision to close a company town.

Pedagogical Objectives: Students have the opportunity to examine and critique complex issues in which the company's affairs are inseparable from environmental and other external factors.

Number of Pages: 23 pp, 4 exh.

Industry: Mining/copper

Level: All

Time: 1980

Location: Montana

Teaching Note: No

Other Curricular Areas: Public Policy

Anaconda Smelter (B)

Author: M. Edgar Barrett

Case Number: BP-0497

Key Issues: Copper Industry, Oil and Gas Industry, Corporate Responsibility, Industry analysis

Synopsis/Situational Context: This case was written as a supplement to the Anaconda Smelter (B) case. It deals with ARCO's decision to close the company's copper smelter in Anaconda, Montana, and its copper refinery in Great Falls, Montana.

Pedagogical Objective: Should be used as a handout toward the end of the Anaconda (A) class session. The (B) case serves as an epilogue. The Anaconda Smelter (A) and (B) series is designed to allow the student to examine the complex, interrelated issues surrounding the decision to be made in respect to whether to close a company town. As such, it should serve to make more obvious how closely tied are a company's affairs to environmental and other external-to-the-company factors.

Number of Pages: 12 pp.

Industry: Copper

Based on: Library and field research

Level: All

Time: 1981

Location: U.S.

Teaching Note: No

Anheuser-Busch Company, Inc.

Author: Neil H. Snyder, Douglas Workman, Rich Bonaventura, John Cary, Scott McMasters, Karen Cook

Case Number: BP-0489

Key Issues: Marketing strategy, competitive analysis, planning, industry analysis

Synopsis/Situational Context: Anheuser-Busch's major competitor, Miller Beer, came out with "Miller Lite" and stunned Anheuser-Busch. Miller Lite rapidly grew and became the second leading beer. The case focuses on competition in the brewing industry as well as the nature of competition in the brewing industry. The case also contains a great deal of information about advertising.

Pedagogical Objective: From a policy perspective, this is an industry case that addresses the ways competition is conducted. The case also helps the student understand the nature of price competition.

Number of Pages: 32 pp.

Industry: Brewing

Based on: Field experience

Level: All

Teaching Note Number: BP-0510TN

Number of Pages: 10 pp.

Other Information: A (B) case is in preparation.

Other Curricular Areas: Marketing

Apple Computer, Inc.—Market Entry in the Home Computer Market

Author: Stuart U. Rich, Roger A. Olsen

Case Number: MK-0260

Key Issues: Product policy, marketing strategy, distribution channels, market segmentation, promotion, advertising, new product development

Synopsis/Situational Context: In November, 1982, the newly appointed manager for home computer markets at Apple Computer had to make a recommendation to the board of directors as to whether or not Apple would aggressively enter the home computer market. If he were to recommend entry, he should lay out a complete marketing program which would enable Apple to become a major factor in the home computer market.

Pedagogical Objective: To require the students to analyze and make specific recommendations for market entry in the highly competitive home computer market, and to lay out a program of action specifying the company's product policy, pricing strategy, distribution channels, and promotional program.

Number of Pages: 22 pp.

Industry: Computers

Based on: Field and library research

Level: All

Time: 1982

Location: U.S.

Teaching Note Number: MK-0298TN

Number of Pages: 8 pp.

Other Curricular Areas: Business policy, entrepreneurship

Apple Computer, Inc.

Author: William H. Davidson

Case Number: BP-0295

Key Issues: Emerging companies and industries, business concept—identification, analysis, implementation.

Synopsis/Situational Context: The case focuses on an on-going project to define, design and introduce a new home computer. The case is set in early 1983.

Pedagogical Objectives: Key objectives are identification and evaluation of the distinctive features of Apple's approach to the microcomputer market, including analysis of the companies key functional policies; analysis of industry forces, relationships and trends; competitor analysis and projection; and scenario development to be used to support recommendations for the case decision-maker.

Number of Pages: 26, 4 Exhibits

Industry: Microcomputers

Based on: Field Research

Disguised: No

Level: Graduate, Executive Education

Time: 1983

Location: U.S.

Other Information: Another case on Apple Computer, MK-0260, takes a marketing approach to the home computer industry. It is set in 1982.

Teaching Note Number: BP-0323TN

Number of Pages: 12 pp.

Arlington Manufacturing Company

Author: M. Edgar Barrett, Susan Swearingen

Case Number: AC-0064

Key Issues: Financial accounting, cost of goods sold statement, bookkeeping techniques, *pro forma* statements

Synopsis/Situational Context: A Financial Statement must be prepared from transaction-related data for a manufacturing firm of approximately \$900,000 annual sales. The case is set in 1980.

Pedagogical Objectives: This is a fundamental exercise in preparing financial statements from transaction-related data as applied specifically to a manufacturing company.

Course Use and Positioning: Designed for use as a third or fourth case in the introductory sequence of a core course at the MBA level.

Number of Pages: 9 pp, 4 exh.

Industry: Manufacturing

Disguised: Yes

Level: All

Time: 1980

Location: U.S.

Teaching Note: No

Ashland Oil, Inc.

Author: M. Edgar Barrett, Charles E. Curtis, Deepak Rai

Case Number: BP-0115

Key Issues: Corporate strategy, oil and gas industry, government relations, industry analysis.

Synopsis/Situational Context: This case focuses on an integrated, diversified oil company in 1979.

Pedagogical Objectives: This case introduces students to a major oil company. Unlike many other integrated oil firms, Ashland's management has historically been concerned with building its reputation in the refining, distribution and marketing areas. Sufficient data are provided for analysis of management's decision to go into upstream activities in the late 1960's, and to divest itself of exploratory properties in 1978.

Course Use and Positioning: This case fits nicely into at least two groups of cases. First, it can be used to provide an in-depth overview of an oil company (see Standard Oil Company (Indiana), Mobil Oil Corporation). Second, it can serve as an introduction to government legislation which affected the oil industry during the 1970's (See The Garyville Refinery (A) and (B)).

Number of Pages: 31 pp, 10 exh.

Industry: Oil and gas

Based On: Library research

Level: All

Time: 1979

Location: Kentucky

Teaching Note Number: BP-0116TN

Number of Pages: 8

Teaching Note Outline: Purpose of the Case/Pedagogical Objectives; The Future; Subsequent Events; Suggestions for Classroom Use; Suggested Questions

Assessing a Gift Horse: Systems Analysis for Planning and Evaluating Foreign Aid (A)

Author: Robert E. Klitgaard

Case Number: PP-0390

Key Issues: Implementation analysis, foreign aid, developing countries, project evaluation

Synopsis/Situational Context: A revolutionary third-world government decided to install a system for "rationalizing" the disjointed and perhaps self-serving foreign aid it received. This led to the design of a system for planning and evaluating foreign aid, which in turn ran into many of the usual problems of bureaucratic politics. Luis Tias of Fulano's National Planning Institute wants to design and implement a system for evaluating the foreign aid received by that country. His office's analytical capabilities are limited, and the political and bureaucratic stakes are large. What sort of system should he design? How should he go about implementing it? What will happen to the system once it is in place.

Pedagogical Objectives: The case illustrates principles of organizational analysis and bureaucratic politics; it explains the analytics of foreign aid; it gives practice in both prediction of later outcomes and explaining those outcomes.

Course Use and Positioning: One possibility is as an example of the ways that bureaucratic politics distort "rational" planning and evaluation mechanisms.

Number of Pages: 16

Industry: Foreign Aid

Based on: Field research

Disguised: Yes

Level: All

Time: Late 1970's

Location: A Latin American country

Other Information: There is a (B) case, PP-0392

Teaching Note Number: PP-0391TN

Number of Pages: 8

Teaching Note Outline: Purposes; Structuring the class; Exhibits for course use, positioning, and assignments

Other Curricular Areas: Accounting and Control, Organizational Behavior

Assessing a Gift Horse: Systems Analysis for Planning and Evaluating Foreign Aid (B)

Author: Robert E. Klitgaard

Case Number: PP-0392

Key Issues: Implementation analysis, Foreign aid, Developing countries, Budgeting and financial management

Synopsis/Situational Context: After 18 months, Tias' system has enjoyed mixed success. Project request forms have been filled out and have been used in decision making. But reports on the progress of projects have not yet been submitted. Tias' office has not done any cross-project or cross-sectional evaluations, and its employees remain preoccupied with the comings and goings of scho-

larship holders and visiting experts. Why did the system fare as it did?

Pedagogical Objectives: The case can be used to illustrate principles of organizational analysis and bureaucratic politics; to explain the analytics of foreign aid; to give practice in both prediction of later outcomes and explaining those outcomes.

Course Use and Positioning: One possibility is as an example of the ways that bureaucratic politics distort "rational" planning and evaluation mechanisms.

Number of Pages: 1

Industry: Foreign Aid

Based on: Field Research

Disguised: Yes

Level: All

Time: Late 1970's

Location: A Latin American country

Teaching Note Number: PP-0391TN

Number of Pages: 8

Teaching Note Outline: See under PP-0390

Other Curricular Areas: Accounting and Control, Organizational Behavior

The AT&T Case and Affirmative Action

Author: Robert K. Fullinwider

Case Number: PP-0325

Key Issues: Government affirmative action policy, preferential treatment

Synopsis/Situational Context: The case focuses on the effects of a consent decree signed between AT&T and the federal government which imposed a stringent affirmative action plan on the company 1973-1979.

Pedagogical Objectives: The case introduces the reader to all the case facts, and to the conflicting opinions. This is a vehicle for defining and identifying relevant moral considerations for judging the acceptability of a controversial social policy.

Number of Pages: 29

Industry: Telephone

Based on: Library research

Disguised: No

Level: All

Time: 1973-9

Location: U.S.

Teaching Note Number: PP-0326TN

Number of Pages: 14 pp.

Autoedit Corporation

Author: Robert Ronstadt

Case Number: ES-0487

Key Issues: Merger and acquisition, buying a company, selling a company, evaluating a company

Synopsis/Situational Context: Autoedit Corp. is acknowledged as the lowest priced, most competitive new product in the emerging high tech field of optical scanning. The company's optical character recognition reader has been developed, produced, and brought to market. Private seed capital and venture capital funds have financed this progress thus far. However, additional resources are

needed. One possibility is to sell out, and initial overtures have been made for this purpose. Negotiations are slated to begin in earnest within a week.

Pedagogical Objective: The case allows students to look at the acquisition process from both the buyer's and the seller's points of view, and to examine the process of negotiation. If the instructor wishes, the case can be used to role play the negotiating process. In any event, it offers students the opportunity to see how negotiations can greatly affect the price of a venture with an uncertain future.

Number of Pages: 12 pp.

Industry: Optical character recognition

Based on: Field experience

Level: Undergraduate, graduate

Time: 1980

Location: U.S.

Teaching Note Number: ES-0482TN

Number of Pages: 31 pp.

Other curricular areas: Finance

Baird-Atomic, Inc.: The System Seventy-Seven Camera

Author: Laurie Tyman, Dharmendra T. Verma

Case Number: MK-0223

Key Issues: Product development, and marketing strategy, marketing in health care field.

Synopsis/Situational Context: This case is concerned with Baird-Atomic's development and marketing of the system Seventy-Seven (S77), a multi-crystal scanning gamma camera. Product sales have not met expectations and company management reviews its marketing approach at a strategy meeting in order to reformulate its marketing plan. The case deals with the difficulties of marketing in the health care field. Students are expected to diagnose the problems facing the company and recommend appropriate responses.

Pedagogical Objectives: Teaching objectives are: (1) To enable students to identify and analyze problems faced by a company unable to meet sales objectives. (2) To provide experience for students in analyzing and evaluating a marketing program for a relatively new product developed by a company for the health care market.

Course Use and Positioning: The case is designed for Advanced Undergraduate or Graduate courses in Marketing Management, Marketing Strategy Development or Product Management. The case has been used in two one-hour and fifteen minute classes and can be used effectively in one two-hour class session. Students find that the "Strategy meeting" in the case is a good forum to help them identify the problems facing Baird Corporation.

Number of Pages: 15 pp, 3 exhibits

Industry: Health care/nuclear medicine

Based on: Field research

Disguised: No

Level: Advanced undergraduate, graduate

Time: 1978

Location: U.S.

Teaching Note Number: MK-0224TN

Number of Pages: 4

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Basic Problem/Decision; Discussion Questions; Discussion; Epilogue

Ballwin Oil Corporation (A): OCS Lease Bidding

Author: M. Edgar Barrett, Stephen C. Watts

Case Number: BP-0361

Key Issues: Competitive bidding, case bidding—offshore

Synopsis/Situational Context: This case deals with a large oil and gas firm's participation in the offshore California lease sale of 1975. It reviews the company's background, provides data about outer continental shelf lease auctions, discusses the 1975 offshore lease sale and discusses some of the key elements of competitive bidding strategies.

Pedagogical Objectives: The case is designed to allow the student to analyze an actual bidding situation.

Number of Pages: 29, 10 Exhibits

Industry: Petroleum

Based on: Library Research

Disguised: Yes

Level: Graduate

Time: 1975

Location: U.S.

Teaching Note: No

Other Curricular Areas: Public Policy

Ballwin Oil Corporation (B)

Author: M. Edgar Barrett, Mary Pat Cormack

Case Number: AC-0117

Key Issues: Petroleum refining, analysis of refinery cost, capital budgeting, joint cost allocation, joint cost vs. by-products, performance measurement.

Synopsis/Situational Context: The issues in this case revolve around the analysis of a capital expenditures proposal at a petroleum refinery in 1981.

Pedagogical Objectives: Students are led to see how important cost allocation is in a process industry. They must also review capital expenditure analysis techniques and concepts in the context of an oil refinery—the allocation of joint costs, profitability analysis of by-products, and incremental cash flow analyses, among others.

Course Use and Positioning: Due to the amount of data and calculation of the data that could be used as part of the overall class session, the instructor will need to lend some structure to the overall class discussion, especially if it is constrained to one class session. Suggested handouts are included in the TN exhibits.

Number of Pages: 15 pp, 5 exh.

Industry: Oil and gas

Based On: Library research

Disguised: Yes

Level: All

Time: 1981

Location: U.S.

Teaching Note Number: AC-0143TN

Number of Pages: 13 pages

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Opportunities for Student Analysis; Suggestions for Classroom Use; Suggested Questions; Exhibits:—Financial analyses and summary discussion points.

Other Curricular Areas: Finance

Ballwin Oil Corporation (C): Transfer Pricing

Author: M. Edgar Barrett, Mary Pat Cormack

Case Number: BP-0075

Key Issues: Transfer pricing, natural gas liquids, petroleum industry, control systems.

Synopsis/Situational Context: This case deals with some of the problems related to the transfer pricing arrangements which exist between several divisions of a major oil and gas company.

Pedagogical Objectives: This case can be used to meet pedagogical objectives in several, somewhat unrelated areas. The case contains a fair amount of data with respect to the natural gas liquids business. As such, it can be used to introduce students to this particular segment of the overall oil and gas industries. This focus alone, however, will not justify the use of an entire class session. The more prominent issues within the case have to do with the use of management control systems in large, decentralized companies in general, and with transfer pricing as a particular subset of the broader issues. The use of transfer prices within medium and large-sized oil and gas firms is quite common and, in many instances, unavoidable. Due to their ability to influence reported financial performance, such things as compensation for managers, rate setting decisions by regulators, and capital budgeting decisions, transfer pricing policies are rarely without controversy. Thus, a second major objective for the class session is to help the students understand the more prominent issues surrounding the controversies.

Course Use and Positioning: Because this case will serve as an introduction to the natural gas liquids industry for many students, it will probably prove useful to spend some time reviewing the nature and role of the product and the industry before proceeding to a discussion of transfer policy.

Number of Pages: 10 pp, 4 exh.

Industry: Oil and gas

Disguised: Yes

Level: All

Location: U.S.

Teaching Note Number: BP-0076TN

Number of Pages: 19

Teaching Note Outline: Purpose of the Case/Pedagogical Objectives; Opportunities for Student Analysis; Suggestions for Classroom Use; Suggested Questions; Additional Suggested Reading; Exhibits (2); Appendices (sample student papers)

Other Curricular Areas: Accounting

Bancil Corporation (A)

Author: Ram Charan, Lawrence Christian

Case Number: BP-0206

Key Issues: Responsibility and allocation of resources in a matrix organization

Synopsis/Situational Context: Bancil Corporation is a rapidly growing multinational company engaged in the manufacture and distribution of consumer products, based in California. In 1973, the company restructured its organization in the form of a matrix of geographical area vice presidents who were responsible for total resource allocation in their geographical areas, and functional or

divisional presidents who had worldwide responsibility for their product line. How can the ambiguous conflict of responsibilities which occasionally arises be dealt with?

Pedagogical Objectives: The Bancil Corporation case provides the student with an opportunity to develop skills in dealing with the coordination of responsibilities among middle-level managers in a multi-axis corporation. The case serves as a useful vehicle for discussion about how a chief executive can use the multi-axis structure to help the corporation focus on a tighter and more effective resource allocation process. In addition, it points out how this structure could allow lower level conflicts of a strategic nature to rise to the top of the management hierarchy for resolution.

Number of Pages: 19 pp, 5 exh.

Industry: Pharmaceuticals, consumer products

Based On: Field research

Disguised: Yes

Level: All

Time: Mid 1970's

Location: U.S./Europe

Other Information: There is a (B) case, BP-0222. Also, the case lends itself to student role-playing.

Teaching Note Number: BP-0207TN

Number of Pages: 6

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Teaching Questions; Strategic Thrusts for Future; Functioning of the Multi-Axis Structure; Opportunities and Problems; Alternative Scenarios; What happened

Other Curricular Areas: International Business

Bancil Corporation (B)

Author: Ram Charan, Lawrence Christian

Case Number: BP-0222

Key Issues: Shared responsibility matrix organization, inter-organizational conflict.

Synopsis/Situational Context: A division of Bancil Corporation (See (A) case, BP-0206) sells surgical products to hospitals and medical laboratories. In Germany, the marketing manager suggests selling directly to general practitioners to counteract competition in that country. Direct selling is against general policy for this product line. How is the conflict best resolved?

Pedagogical Objectives: This short episode forces students to resolve a conflict between product/president and geographical/vice-president in a multinational matrix organization.

Number of Pages: 2

Industry: Pharmaceutical

Based On: Field research

Disguised: Yes

Level: All

Time: 1975

Location: U.S./Germany

Other Information: The (A) case with background is BP-0206.

Teaching Note Number: BP-0207TN

This note is designed primarily for the (A) case, and is described there.

Number of Pages: 6 pp.

Other Curricular Areas: International Business

Barkston Foods, Inc.

Author: John W. Hennessey, Jr.

Case Number: OB-0441

Key Issues: Management of older executives, control and discipline at executive level, executive behavior, rights to privacy, due process at executive level, paternalism and its effects

Synopsis/Situational Context: An executive runs into debt. He and his wife accept a loan from the company with an agreement to cap spending and return to a strong performance. Two years later, a new, young superior learns that the executive has gone back into debt by borrowing at the bank. Despite the subordinate's age and service, the superior decides to punish him. What is an appropriate punishment?

Pedagogical Objective: The case is intended to teach the skill of analysis/diagnosis and action.

Number of Pages: 6 pp.

Industry: Food

Based on: Field research

Level: All

Time: Unspecified

Location: U.S.

Teaching Note: No

Other curricular areas: Business Society and Ethics

Ben Triplet

Author: Robert Ronstadt

Case Number: ES-0159

Key Issues: Entrepreneurial careers, managing growth, entrepreneurial sacrifice.

Synopsis/Situational Context: A 44-year-old entrepreneur faces burnout, and wonders how he can be a good family man as well as a good entrepreneur.

Pedagogical Objectives: Students can trace the evolution of an entrepreneur who has struck out on his own after career disappointments in the paper business. The issue of personal sacrifice as an element of an entrepreneurial career can be raised.

Course Use and Positioning: This is a good introductory case, especially if a similarly situated entrepreneur can attend the class.

Number of Pages: 9 pp

Industry: Paper products

Based on: Interviews

Disguised: Yes

Level: Undergraduate, graduate

Time: 1981

Location: Northeast

Teaching Note: Available October 1983

Blue Mountain Resorts, Ltd. (A)

Author: Willard H. Ellis

Case Number: BP-0013

Key Issues: Resort area development, capital investment, alternative investment, family business.

Synopsis/Situational Context: A popular Canadian resort located two hours from Toronto has to decide whether to promote its ski business or expand into other areas during off season.

Pedagogical Objectives: The richness of financial data on the company favors use by financial professors to demonstrate various capital budgeting techniques, and by policy professors who wish to sharpen the financial skills of students early in the term. Quantitative and qualitative issues are intertwined throughout.

Course Use and Positioning: Because of intermingling of quantitative and qualitative data, this case can be used with success by both finance and policy professors.

Number of Pages: 29 tp, 11 exh.

Industry: Resort management

Based On: Field experience

Level: All

Time: 1975

Location: Canada

Other Information: The case is rich in exhibits.

Teaching Note Number: BP-0102TN

Number of Pages: 7

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Student Assignment; Opportunities for Student Analysis; Outcome; Exhibits: Financial statements and notes

Other Curricular Areas: Finance, Entrepreneurial Studies

Blue Mountain Resorts, Ltd. (B)

Author: Willard H. Ellis, Brenda MacKenzie

Case Number: BP-0151

Key Issues: Resort area development, family-owned business, corporate strategy, planning for growth.

Synopsis/Situational Context: The (B) case is set five years after the (A) case; 1980. The resort has expanded. What should be the next priorities?

Pedagogical Objectives: Students must look both at the environmental climate and at the financials to determine a viable future strategy.

Course Use and Positioning: It is interesting from a teaching point of view to do case (A) first and then hand out case (B) for discussion at a following session. However, the (B) case was written to stand alone and is now used primarily as such.

Number of Pages: 33 pp, 11 exh.

Industry: Resort management

Based On: Field experience

Level: All

Time: 1980

Location: Canada

Other Information: The (A) case is BP-0013

Teaching Note Number: BP-0175TN

Number of Pages: 8

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Questions for Discussion; Opportunities for Student Analysis; Epilogue; Exhibits

Other Curricular Areas: Finance, Entrepreneurial Studies

Bordados Maty, S.A.

Author: Lincoln W. Deihl

Case Number: BP-0031

Key Issues: Industry analysis, environmental analysis of threats, company strengths and weaknesses, identification of strategic options, strategic choice and implementation.

Synopsis/Situational Context: Bordados Maty S.A. is a large family-controlled Mexican manufacturing firm in the apparel business. Over the years it has grown in a random, haphazard manner. Now, the company's management is being "professionalized" along with the introduction of new formal structures and planning systems.

Pedagogical Objectives: Aside from serving as a vehicle for strategic analysis, Bordados Maty offers students an opportunity to learn more about business practices in Mexico—the recent oil boom has fueled rapid industrialization, and we need a greater understanding of our neighbor to the South.

Course Use and Positioning: This is a comprehensive Business Policy case.

Number of Pages: 18 pp, 4 exh.

Industry: Apparel

Based On: Field research

Level: All

Time: 1980

Location: Mexico

Teaching Note Number: BP-0105TN

Number of Pages: 8

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Suggested Discussion Questions; Environmental Analysis and Diagnosis: threats and challenges, opportunities; International Analysis: weaknesses, strengths; Alternative Strategies; Strategic Choice; Implementation; Appendix: Financial Analysis

Other Curricular Areas: International Business

Boston Bruins Shot at Moving to Salem, New Hampshire—Kick Save by the State

Author: Glenn M. Wong

Case Number: FI-0509

Key Issues: Facility financing, sports—professional, feasibility studies, financing—public, economic impact, Boston Bruins, sports management

Synopsis/Situational Context: Delaware North, the parent company of the Boston Bruins and the Boston Garden, in 1980-81 proposed to rebuild Rockingham Park in Salem, New Hampshire. The proposal included a race-track for horses and dogs and a stadium for the Bruins. The proposal also called for a great deal of financial assistance from New Hampshire. Delaware North's proposal was rejected. The case is not disguised.

Pedagogical Objective: The student is presented facts and background information required for the preparation of a financial feasibility study. The student can make deductions, select alternatives and draw conclusions.

Number of Pages: 40 pp.

Industry: Sports

Based on: Library research

Level: All

Time: 1982

Location: U.S.—Northeast

Teaching Note: In preparation

Course Use and Positioning: Finance—financing a facility through a long-term debt with bonds; public policy—role of the government in financing a private business; sports management—facility financing, team movement consideration.

Other Curricular Areas: General management, Public policy

The Boston Gas Rate Case

Author: M. Edgar Barrett, Mary Pat Cormack

Case Number: PP-0118

Key Issues: Natural gas industry, rate hearings, regulatory environment, oil and gas industry.

Synopsis/Situational Context: The case deals with a rate increase hearing which took place after a natural gas utility company filed a request for a rate increase in 1975.

Pedagogical Objectives: The case allows students to obtain a reasonable understanding of how regulatory bodies deal with requests for rate increases. Data are provided on the narrowly focused, and somewhat technical, set of issues concerning the appropriate cost of equity capital, as well as a much broader set of issues such as "regulatory lag" and the role of regulatory agencies in determining the economic health of sizable individual firms.

Course Use and Positioning: This case is usually used to introduce students to a new subset of the overall oil and gas industry.

Number of Pages: 16 pp, 5 exhibits

Industry: Oil and gas

Based on: Library research

Level: All

Time: 1975

Location: Boston

Teaching Note Number: PP-0119TN

Number of Pages: 7

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Opportunities for Student Analysis; Suggestions for Classroom Use; Assignment Questions; Related Reading Material; Exhibit (1)

Other Curricular Areas: Business Policy, Finance

The Brimmer Street Garage

Author: Robert Ronstadt, Nancy Tiekens

Case Number: ES-0189

Key Issues: Real estate development, condominium conversion, new venture concept.

Synopsis/Situational Context: A young real estate developer considers buying a garage, the only one on Boston's residential Beacon Hill—and turning it into a condominium for cars. (At present, tenants rent by the month.)

Pedagogical Objectives: Students have the opportunity to evaluate a new venture concept from several angles: the viability of the venture, the expertise of the entrepreneur, financing, and customer acceptance. In addition, students learn about political aspects of real estate dealings.

Number of Pages: 12 pp, 4 exh.

Industry: Real estate

Based on: Interviews

Level: Undergraduate, graduate

Time: 1979

Location: Boston

Teaching Note: Available October 1983

Other Curricular Areas: Real Estate

Brondes Motors

Author: M. Edgar Barrett, Edward S. Feldman

Case Number: AC-0072

Key Issues: Management control systems, transfer pricing, performance measurement, automobile dealerships.

Synopsis/Situational Context: A general manager is faced with the problem of mediating a dispute involving three managers (new car, used car and service) over both transfer prices and departmental responsibilities.

Pedagogical Objectives: The student is required to assess the firm (its objectives, its key success factors and its organizational structure), and then decide upon an appropriate course of action in this specific instance, as well as critiquing the overall management control system as it currently exists. An important issue is the choice of the type of responsibility center to use.

Course Use and Positioning: The case is designed as either an overview or summary case in the area of management control systems.

Number of Pages: 5 pp., 1 exh.

Industry: Automotive

Level: All

Time: 1981

Location: U.S.

Teaching Note Number: AC-0506TN

Number of Pages: 9 pp.

C.B. Radio— The R.A. Greener Company

Author: Ronald Greenwood

Case Number: BP-0318

Key Issues: Poorly managed company, autocratic family-owned business.

Synopsis/Situational Context: Small to medium sized family firm with an autocratic president thinks it can sell millions of C.B. radios because it produces outstanding quality products. The company does not see the giants waiting in the wings.

Pedagogical Objectives: This case illustrates that the financial ratios may look strong but they reflect past decisions. The future is the key to the case and the president may have misguessed it. Students should run the numbers, then discuss the potential marketing problems, autocratic style of management and what should the firm do next.

Number of Pages: 18, 6 Exhibits

Industry: Radio (small appliances)

Based on: Field Research

Disguised: No

Level: All

Time: Unspecified

Location: U.S.

Teaching Note Number: BP-0319TN

Number of Pages: 10 pp.

Cabinet Crafters, Ltd.

Author: M. Edgar Barrett, Charles T. Sharpless

Case Number: AC-0068

Key Issues: Basic financial accounting, financial statements preparation, cash versus accrual.

Synopsis/Situational Context: A small, wholly owned enterprise must prepare a set of financial statements.

Pedagogical Objectives: This is basically "an exercise wrapped in case clothing." It can be used to demonstrate journal entries, T-accounts, and to derive all three primary financial statements.

Course Use and Positioning: The case is for use in the early part of a core course in financial accounting. Since it is short, it can be covered in one 80-minute class.

Number of Pages: 3 pp, 0 exh.

Industry: Manufacturing

Disguised: Yes

Level: All

Time: Unspecified

Teaching Note: No

Cascade Steel Company

Author: Stuart U. Rich, Pamela White

Case Number: MK-0349

Key Issues: Developing a computerized information system for purchasing and materials management.

Synopsis/Situational Context: A distributor of carbon steel products was using its computer for the following: 1) operating reports, such as purchase orders and cash commitments; 2) completing of records, such as cash disbursements journal and accounts payable ledger; and 3) order follow-up, such as receipts of invoices. The purchasing manager was wondering how the company could improve its efficiency by further computerizing its purchasing system to include demand and price forecasting, inventory levels, purchase requisitions, and analysis of sources of supply.

Pedagogical Objectives: To teach students the design and practical use of a computerized management information system as applied to the purchasing and materials management function.

Number of Pages: 9, 4 exhibits

Industry: Steel

Based on: Field Research

Disguised: Yes

Level: Grad/Undergrad

Time: Unspecified

Location: Oregon

Teaching Note Number: BP-0350TN

Number of Pages: 3 pp.

Cascadia College: Implementing a Student Retention Program

Author: Larry D. Alexander

Case Number: BP-0287

Key Issues: Strategy implementation, high turnover in college, resistance to change.

Synopsis/Situational Context: A medium-sized college in the Pacific Northwest is faced with a declining student enrollment. The college president has just made a strategic decision to combat this trend by implementing a student retention program to reduce student turnover, but has left the specific formulation to his assistant. What should be done?

Pedagogical Objectives: This case focuses on a common "real world" problem of how to implement a strategic

decision that has already been made by someone else. Business Policy students have been able to relate very well to this case. By the time they are seniors or second year M.B.A. students, they have had a number of years of experience in this industry, and hopefully are more aware of the specific conditions necessary to effectively implement a strategic decision. In addition, students should be more aware of possible problems that can develop which could adversely impact the implementation of a student retention program.

Course Use and Positioning: Usually used in combination with a written assignment of six to eight pages.

Number of Pages: 19 pp, 5 exh.

Industry: Higher education

Based On: Generalized experience

Disguised: Yes

Level: Undergraduate, graduate

Time: unspecified (c 1980)

Location: Northwest

Teaching Note Number: BP-0288TN

Number of Pages: 9

Teaching Note Outline: Purpose of Case/Pedagogical Objectives; Written Assignment; Improving Teaching Ability; Addressing Other Major Causes of Student Turnover; Initial Scope of Program; Available Information Sources; Structuring the Implementation Process; Concluding Comment

Other Curricular Areas: Organizational Behavior

The Case of the Deflated Chemist

Author: Thomas R. Hofstedt

Case Number: AC-0424

Key Issues: Inflation adjusted financial statements, performance measurement

Synopsis/Situational Context: The case involves a start-up venture in the specialty chemicals business in 1981. The division managers reported results which have been roundly criticized, on both technical and substantive grounds, by the corporate level CEO.

Pedagogical Objective: The case is designed to serve as the basis for a 75-minute to 120-minute class session focused upon the performance measurement aspects of inflation adjusted accounts. As such, it can be used to illustrate quite vividly how inflation distorts the measured results of a firm or division.

Number of Pages: 5 pp.

Industry: Chemicals

Based on: Generalized experience

Level: All

Time: 1982

Location: U.S.

Teaching Note: No

Other curricular areas: Finance

Celanese Mexicana, S.A.

Author: Lincoln W. Deihl

Case Number: IB-0079

Key Issues: Mexican conglomerate, strategic planning in Mexican environment.

Synopsis/Situational Context: A successful Mexican conglomerate must plan for the future, against the uncertain