

STAFFING
INSTRUCTOR'S MANUAL



Top Choice—A Case Study in Succession Management

By Steve Weingarden, Ph.D.

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How To Use This Case Study

(Please adapt these steps to fit your specific needs.)

Step 1 – Instructor Reviews Case Study

- 1.1. Review the case study to obtain a general understanding of the objectives, process, content, possible areas for adding or deleting pieces and logistics.
- 1.2. Print or make available enough copies of the student version of the case study so that each student receives their own copy.

Materials Required for Step 1

- Instructor version of the case study (contained within this document).
- Student version of the case study (contained within this document).

Step 2 – Students Receive Case Study

- 2.1. Provide students with copies or access to the student version of the case study.
- 2.2. Assign students a deadline for reading the case study and any other related reading materials (e.g., articles or chapters on executive selection) that the instructor wishes to include. This reading should be completed outside of class.

Materials Required for Step 2

- Copies of or access to information for the student version of the case study.
- Any additional materials that the instructor would like to relate to the case study.

Step 3 – Applying the Case Study Learning

- 3.1. The instructor should do one of the following in the class session following the assigned reading deadline:
 - 3.1.1. Conduct the exercise (see 3.2).
 - 3.1.2. Omit the exercise and hold a forum around the *Discussion Question Guide*.
- 3.2. If the instructor elects to conduct the exercise, he or she should:
 - 3.2.1. Remind students of *The Request and Your Assignment* sections at the beginning of the case study. Students are expected to work in groups to:
 - Create appropriate recommendations for the chair regarding searching for and selecting a new president.
 - Explain their rationale for each recommendation.
 - Prepare a written presentation of their recommendations.

- Present their recommendations to the class and leave time for questions.

3.2.2. Assign students to groups. There are enough unique exercise materials provided for up to six groups to receive customized franchise materials. It is recommended that each group have between three to five students. Group composition may be random, or the instructor may wish to ensure there is at least one strong performer in each group and could assign the groups in advance, according to earlier semester student performance.

3.2.3. Provide all groups with the exercise materials related to *Exercise Instructions, The Franchise President Role in Baseball and League Newspaper Clippings*. For example, each group should have the same information about the presidential role and news related to the league.

3.2.4. Provide each group with unique exercise materials for one specific franchise. For example, Group A may receive the exercise materials for the *Owlet* franchise while Group B may receive the exercise materials for the *Elvers*. Providing the unique materials to groups is critical to demonstrate that different organizations may have different needs in relation to executive selection. If less than six groups are used, select materials that represent varying situations for the executive succession plan.

3.2.5. Remind groups to also use the *Discussion Question Guide* to help direct their conversations. The instructor should consider informing students that the discussion questions will be reviewed at a later time.

3.2.6. Allow in-class time for students to work in their groups and begin the assignment. The instructor should circulate among the groups to ensure that each group has an approach that is consistent with the assignment. If a group seems to be off-track, the instructor should guide the group toward an approach that will obtain the required results.

3.2.7. Allow students to work as a group outside of class – provide at least one week for students to reflect on their approach and to prepare their presentation. Two weeks is recommended, if possible.

Materials Required for Step 3

■ *Discussion Question Guide*

- Exercise materials common to all groups
- Exercise materials unique to each group

Step 4 – Presenting the Case Study Learning

4.1. Before the class session in which the students will make their presentation, take requests for any media equipment (the instructor may want to take ownership of this step without student requests). An LCD projector is recommended. Depending on classroom size, a microphone may also be needed. In some cases, such as online courses, presentations may need to be sent or posted in advance of class.

4.2. Instructors may want to provide a PowerPoint template to students to use for their presentations. If the instructor decides to provide a template, consider including the following slides (some could be combined into one slide):

- Title.
- Purpose or objectives – This relates to the succession initiative, not the course. Why does this initiative exist? What is the intended outcome?
- Roles and responsibilities – What is the role of the board of directors and what is the role of HR?
- Scope – Will the initiative apply only to the team president, or will it be broader?
- Timeline – What are the milestones and their associated dates? Are any of the deadlines flexible? When will the initiative start and end?
- Deliverables – What outcomes are expected from this initiative?
- Overview of findings – What are the recommendations?

This is a critical slide in the presentation. Students may run out of time before finishing their presentation. Consequently, it is essential to reach this slide quickly and direct the audience to these findings. Many of the slides leading up to this one would likely have been covered during an earlier meeting between the HR specialist and associated stakeholders.

Remind students that they are not recommending a specific individual to be hired but rather an approach for recruiting a pool of qualified candidates and selecting an individual for the position.

- Detailed finding slides – What specific details make up the rationale for the recommendations? This may be several slides.
- Next steps or summary – What should happen next? The internal consultant (the HR specialist) must demonstrate how the plan will achieve the desired results.

4.3. Allow groups to decide the order in which they will make their presentations. The instructor should warn groups well in advance of their presentations that there will be a firm time limit. An appropriate explanation is that the chair has another meeting immediately following the presentation.

4.4. Groups present their recommendations to the class. It is recommended that 15 minutes be allowed for students to make their presentations and an additional five minutes be allowed to address any questions (for a total of 20 minutes).

Materials Required for Step 4

- Media equipment

Step 5 – Reinforcing the Case Study Learning

5.1. The instructor should guide a discussion about the presentations, preferably during the same class session in which they are delivered. The *Discussion Question Guide* should be reviewed.

5.2. Next, the instructor should review the *Learning Objectives* with the class. Highlight the importance of customizing executive selection to fit the specific organization.

Materials Required for Step 5

- *Discussion Question Guide*
- Case Study

Instructor Version of the Case Study



Teaching Notes

Please familiarize yourself with this case study prior to sharing it with students. It may be helpful to highlight areas of the case study where you can integrate your own materials.

A student version (without teaching notes) is included as the second half of this document. Students should read through the entire case study on their own before class. Instructors can then discuss the critical points in the case study either before separating students into work groups or after the students have presented.

The estimated time to complete this case study will vary depending on the number of groups participating in the exercise. Class time and some group work outside of class may be expected. Presentations should have a dedicated class session. The overall estimated time needed to complete this case study is 12 hours (approximately three hours in-class time, and nine hours outside of class).

INTRODUCTION

This is a scenario-based case study with a structured exercise available. It is intended for upper-level undergraduate students, preferably with a basic understanding of organizational structure and selection.

Learning Objective(s)

Upper-level undergraduate students will engage in a case study about succession planning management—specifically at the executive level in a highly public situation—and job analysis. At the end of the case study, students will be able to:

1. Identify and develop sources of information used for executive selection.
2. Learn the various factors that must be taken into account in designing an executive job.
3. Identify how organizations gain a sustainable competitive advantage through human capital strategies.
4. Identify the framework for planning and scoping a project for a client.

CASE OVERVIEW

Your Role and the Organization

You are the vice president of human resources for a professional baseball team that competes in a league with 30 franchises across 25 cities in the United States, Canada and Mexico. Each team operates as an independent business but is governed by a central league office. The league is highly competitive and teams battle over many of the same resources including personnel, media attention, some marketing revenues, and, at times, a shared customer base. While franchises compete against one another, there is centralized cooperation to ensure competitive balance. The average annual revenue per franchise has risen consistently for each of the past 15 years and now averages \$150 million per franchise per year.

The competitive season runs from April through September, culminating with a championship in October for those teams reaching the playoffs. While the franchises are extremely busy during the competitive season, there is also plenty of work to be done between November and March. Thus, the industry operates on a 12-month cycle.

The organizational structure for on-field personnel is consistent across franchises, but it varies by team in the staff functions. Only 10 franchises have HR strategist positions, and only recently has that position featured vice president-level work. Generally, franchises employ between 125–300 staff, excluding on-field personnel.

The Request

On August 2, your team's board chair calls you to a confidential meeting and informs you that the president will be retiring at the end of the season. This is the first time you have heard about a change at the presidential level. Approximately six franchises (20%) replace their president each year, so while this is not an uncommon occurrence it is a critical change within the organization.

Your exercise information packet will provide you more detail regarding what the presidential change might mean to your organization. The packet includes:

- An abridged media guide.
- Newspaper clippings.
- Press releases.
- A summary of examples describing roles played by past team presidents.



Teaching Notes

Student groups may confer with other groups, but ultimately, the choice of a new president involves customization to the particular franchise associated with the student group. Thus, the materials in the franchise information packet are critical to providing guidance on how to select a new president.

Teaching Notes

Students may also question the chair's approach and whether it is appropriate for the vice president of HR to hear about the president's retirement through him rather than hearing directly from the president. This presents an opportunity for a discussion about organizational culture and bureaucracy. What are the concerns about receiving the information from the chair? What other questions would the vice president of HR want to ask?

Your Assignment

The chair asks you to develop a plan to replace the president. To respond to the request, your group will have to:

- Create appropriate recommendations for the chair about searching for and selecting a new president.
- Explain your rationale for each recommendation.
- Prepare a written presentation of your recommendations.
- Present your recommendations to the class, leaving time for questions.

CONSIDERATIONS WHEN SELECTING A NEW FRANCHISE PRESIDENT

Similar to other strategic HR initiatives, it is important to have a game plan when preparing recommendations for recruiting and selecting a new franchise president. As part of that plan, you must:

- Collect data.
- Understand the job.
- Identify the competitive advantages gained through the job.
- Present your findings in a professional manner to the chair and any other stakeholders.



Teaching Notes

This is an opportunity to discuss other steps that might be included in a strategic HR initiative. For example, the ADDIE model of instructional design or the Action Research model could be reviewed (please see below). One particular question might be whether or not – and how – an approach might vary depending on the industry. Project planning will be covered later in the case study. Discussion may also include how the different scenarios in the case might lead to different approaches.

The **ADDIE Model** is a systematic process that is often used for learning initiatives, but can be adapted for other types of initiatives.

A = Needs **assessment** – collect data to identify gaps between actual and desired performance.

D = Program **design** – decide on content, goals /objectives, delivery style and implementation.

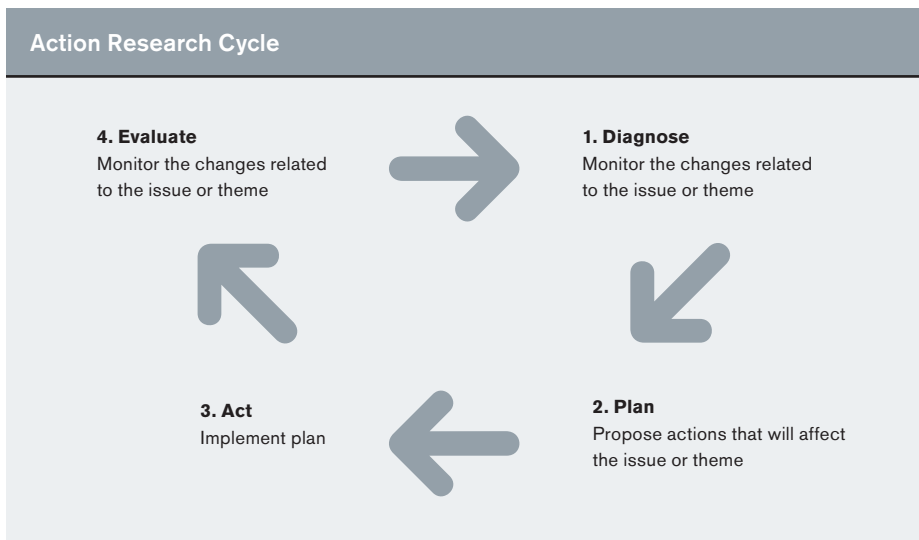
D = Program **development** – create or modify materials to meet objectives.

I = **Implementation** of programs – deliver programs to target audience.

E = **Evaluation** – compare program results to established objectives.

Source: SHRM Learning System, 2007

The Action Research Model is a systematic process often used for organizational development initiatives, but can be adapted for other types of initiatives.



Source: Based on French and Bell, 1999

Data Collection for Recruiting and Selecting a New Franchise President

Before making a formal recommendation about how to select a new franchise president, HR professionals should analyze any existing information that might be helpful in guiding the recommendations.

Information about past practices and best practices is likely to be relevant. However, it is essential to recognize that best practice can sometimes be unclear, defined incorrectly, or lack relevance to your particular organization. A series of questions should be asked when reviewing best practices to ensure that size, type and fit are appropriate to your organization (Aldrich, 2007).

Often, the categories of data collected follow a typology of “internal resources” and “external resources,” although other typologies should be considered depending on the nature of your project.

For this case study, we will follow the “internal resources” and “external resources” typology. Internal resources to consider in developing a recommendation about how to select a new president include:

Type of Internal Data	Examples
Organizational	Mission, strategy and values. Structure and ownership composition.
Job	Job analysis results. Interviews with subject matter experts (SMEs). Job profiles.
Search Purpose/Motivation	Successful retirement. Predecessor derailment (failure to meet expectations).

Internal data will generally provide a sense of where the organization has been and is, and how the job has been done and is currently being done.

External resources to consider in developing a recommendation about how to select a new president include:

Type of External Data	Examples
Industry	Trend reports. Centralized documentation (e.g., league reports). Surveys (e.g., Harris Interactive Poll).
Competitor	Published competitor data (e.g., Hoover’s). Published competitor strategies. Media reports (may be of varied reliability).

External data will generally provide a sense of where the organization may want to go in the future.



Teaching Notes

Depending on the type of project and the true urgency associated with it, HR professionals may have to balance the level and intensity of data collection with the need to produce results by a given time. In more direct form, this is the balance between quality and timeliness.

Understanding the Team President Job

It is essential to define a job before recruiting or selecting for it. This helps HR professionals to establish criteria to evaluate candidates applying for the job (SIOP, 2003). Job definition should be linked to organizational success. So, job definition centers around an analysis of the organizational work provided through the job. By defining the job through an analysis of the core work, you can measure success based on the criteria that are deemed relevant to success in that job.

A good process to follow for gaining an understanding of a job is to collect information from multiple sources and integrate that information. When possible, the sources should represent both quantitative and qualitative information. In fact, there are usually many sources available to help in understanding a particular job.

The Occupational Information Network (O*Net), <http://online.onetcenter.org>, sponsored by the U.S. Department of Labor, is an example of a job information classification system based on surveys of workers currently in the occupation. By collecting information from many organizations, O*Net job information is generic—which can be an advantage or a disadvantage, depending on what you are trying to accomplish. O*Net information includes experience, worker and occupation requirements, worker and occupation characteristics, and occupation specific information. As an example of O*Net information that might be helpful in understanding the franchise president job, O*Net summarizes the franchise president’s role as follows: “Determine and formulate policies and provide the overall direction of companies or private and public sector organizations within the guidelines set up by a board of directors or similar governing body. Plan, direct or coordinate operational activities at the highest level of management with the help of subordinate executives and staff managers.”

Existing job descriptions can demonstrate the complexity associated with a job. Job descriptions describe the critical features of a job, including the major functions or duties (Pritchard, 2002). Thus, job descriptions are a great source to understand a job. While some organizations have job descriptions for all levels, it should be noted that other organizations do not have formal job descriptions for president or CEO positions.

Roles played by past presidents can also be a useful resource and may indicate a trend in how the job has evolved over the years. Any resources that describe the role as it has existed in your organization or how it has existed in competitor organizations could prove valuable to understanding the job as it will exist in your organization’s future.

Once you have collected information to guide your understanding of the president job, it is vital to customize the information to fit your organization. Reviewing the organizational mission, strategies and values is one way to ensure that your job assessment is appropriate to your organization. Additionally, obtaining information about the future direction of the organization and the job can help in making a sound selection for the next president.



Teaching Notes

It is possible to have some overlap between the internal data and external data collected for understanding the team president job.

Teaching Notes

This is an opportunity to discuss whether job descriptions should exist for presidents, CEOs and board chairs. Under what conditions could it be less useful to have job descriptions for these positions? Why would some organizations not have job descriptions at these levels?

One reason cited for the lack of a president’s job description is that while the broad work completed by the president remains stable, the specific duties frequently change and are redefined for the short and long term through interaction between the president and the board of directors. For more detail on this relationship, see Conger, Lawler and Finegold (2001).

At this point, we have focused on how to develop a succession plan for a new franchise president. Much of that work could and should have been done before the chair made the request; organizations should be planning for succession rather than waiting until a succession is about to occur to begin the process. HR professionals should make the business case for succession planning at all levels of the organization long before recruiting for a particular position needs to happen. There are plenty of in-depth resources on succession planning available to aid the process (e.g., Day, 2007; SHRM Learning System, 2007).

Competitive Advantage

Selecting a top executive can be crucial to an organization's competitive advantage. Over time, top leadership can influence an organization in a number of ways. Some of the outcomes heavily influenced by a president might include how a budget is spent, profit margins and/or stock prices (Day & Lord, 1988; Lieberman & O'Connor, 1972; Weiner & Mahoney, 1977; Smith, Carson & Alexander, 1984). It is not solely the selection of a president that influences these outcomes, but rather the selection of a president who possesses the needed leadership abilities. Additionally, the president has to fit with your organization—the president should either be qualified for your organizational culture or be hired to change the culture.

In the baseball industry, typical outcome variables might include profit, winning championships, winning percentage, attendance and marketing success. Other outcome variables may also be appropriate to the industry or to a specific organization.

Presenting Your Work as an Internal Consultant

As with external consultants, it is important for HR leaders to foster a professional consultant-client relationship with internal stakeholders (e.g., the board, senior executives and staff). How and what is communicated will affect how you are perceived as a strategist. To guide what and how you communicate, you must have in-depth knowledge of your organization's strategy. Ideally, you will be part of the organization's strategic planning process. If this is not the case, however, you must seek out that information.

HR's strategic role requires not only an understanding of the organization's business, but also an understanding of the environment, competition and trends that are relevant to the organization (SHRM Learning System, 2007). To send a message of partnership, HR professionals must assist senior executives and other key personnel by providing strategy-related information to these clients—*before* it has been requested.

In line with the consultant-client model, documentation should be established at the earliest stages of the relationship and updated and expanded as the relationship progresses. Both the internal consultant and the client need to be in agreement on all documentation in order for the project or initiative to be successful. The documentation creates the path to follow and sets expectations. It is much harder to



Teaching Notes

In addition to existing information about the future of the organization and job, it is possible to conduct a future-oriented job analysis. For more information on this topic, see Cascio (1998).

Teaching Notes

Examples of successful and unsuccessful organizational leaders are plentiful. Recent newsworthy examples can be discussed with the class and could focus on what outcomes were expected of those particular leaders within their organizations.

backtrack and fill in these communication items than it is to establish them at the beginning consultation.

Sometimes a project plan is not appropriate, but internal consultants should err heavily in the direction that a project plan is expected. Documentation should be an outcome of consultation. The purpose of a project or initiative should be defined. This may require asking probing questions of the client and may require preliminary data collection. Beyond the purpose, it is also important to identify—and then provide feedback through documentation—scope, deliverables, a project plan, and relevant appendices. Appendices might include a glossary, models, or other information related to the project or initiative.

Some cases may require multiple versions (multiple documents) of the final recommendations, to target various audiences; to accommodate different presentation time allotments; or to address differing styles of audiences and presenters. Supporting documentation can be useful to provide detailed insight into a particular facet of the project or initiative message, or to explain how you arrived at the recommendations stage.

KEY TAKEAWAYS FOR HR STRATEGISTS

To make sound recommendations for an executive succession strategy, HR professionals must:

- **Collect data** to build the foundation for your recommendations.
- **Understand the job** as it currently exists and also in terms of how it will change in the next several years (e.g., internal organizational needs and external changes in the industry, demographics, society).
- **Customize recommendations** to fit your organization (e.g., examine the organizational mission, vision, values and strategies).
- **Identify the competitive advantage** in the executive selection strategy that is being recommended.
- **Communicate as a strategic partner** and relate your recommendations to the organizational strategy.



Teaching Notes

If appropriate software is available—for example, Microsoft PowerPoint—this could be an opportunity to share several documentation templates with the class or to engage in a class exercise to develop a template.

Discussion Question Guide

Think about these questions while completing the case study exercise. Answer the questions after the exercise and presentations.

1. What are the main issues in the case?
2. Describe the information that would be most useful in forming a recommendation for this particular case.
3. Describe possible courses of action for resolving the issues in the case, and the pros and cons of each.
4. What creative approaches could be used to help understand the franchise president job? Which resources do you think would be perceived by the client as most credible in understanding the job?
5. Think about other industries. How do presidents and CEOs in those industries help their organizations achieve a competitive advantage? What outcomes are different in those industries?
6. As an internal consultant, what secondary issues might you be concerned with as you become involved in this project?

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Exercise Instructions

Your group will complete each of the following:

- Create recommendations for the chair regarding a search for and selection of a new president.
- Explain your rationale for each recommendation.
- Prepare a written presentation of your recommendations.
- Present your recommendations to the class and be prepared to respond to questions.



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Teaching Notes

In the workplace, the assignment will usually not be as conveniently packaged as it is in this exercise. Instead, HR strategists need to glean the assignment from less explicit explanations.

The written presentation should include an overview that summarizes the project elements (e.g., project purpose, scope, deliverables, a project plan and relevant appendices). The recommendations should follow these elements. Also, it is advised that a presentation time limit be enforced and that the presentation be formalized, using PowerPoint or a similar technology. Part of the learning revolves around the internal consulting role. In most instances, an internal consultant is not allowed extra time to complete a presentation, and the quality of the presentation is as important as the content. A well-designed approach delivers the key messages at the beginning of the presentation, again in the middle and once more at the end. Delivering the key messages at the beginning of the presentation is especially important because many presentations do not reach their end, at least not in linear fashion.

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Teaching Notes

The recommended process for conducting this exercise is as follows:

- Divide students into up to six groups with three to five students in each group (allow the option for a student to work alone, if that is appropriate to your educational institution's approach to group work).
- Allow time to work on the exercise in class.
- Arrange, if possible, for the exercise to flow over the course of a week or longer. This will provide students with time to reflect on the information, to consider questions of integrating themes and to polish their presentation. Exceptional groups will have their own customized value-adds for the assignment (e.g., bring in comparative information from other sports leagues; conduct their own informal survey or focus group of students' views toward specific sports).
- When the groups present, be sure to leave time or request that the groups leave time for questions or comments from other groups. Dialogue is a key part of the assignment in order to fully understand how the situational elements required that the recommendations be customized.

For more detailed process notes, see *Recommended Process for Using This Case Study*.

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Teaching Notes

There are no set right answers for the recommendations and presentations. In fact, each group should have a slightly different set of recommendations that fit their specific franchise. However, the best recommendations and presentations should include the following elements:

- Reference to the presidential role in baseball and relation of that role as a normative standard or guideline within the specific organization.
 - Analysis of the league newspaper clippings and their relationship to the state of the industry.
 - Alignment of the specific franchise mission or vision to the executive succession process for that franchise.
 - Discussion of how franchise outcome data (e.g., winning percentage, attendance, presidential turnover rates) supports the recommendations.
 - Insight into how recent media reports or press releases are affecting the perception of the franchise.
 - Recommendations for how to proceed in the executive succession process.
-

Exercise Materials

The Franchise President Role in Baseball

While the league has been in existence for approximately 75 years, the franchise president's job has retained many of the same duties. For example, consistent across time, the franchise president is responsible for developing the organizational mission and vision, building the top management team, marketing the franchise and serving as an ambassador to the community. However, how those and other duties are achieved has changed over the years. For example, the president's interaction with the chair or owner has changed, as has the level of involvement with personnel matters.

In the first 25 years of the league, the team president was likely to be the owner and succession was kept within the family—"legacy succession". However, sometimes the legacy successions were not as smooth as expected, with a lack of clarity as to which relative should become the president when an incumbent unexpectedly passed away. During this time, presidents were heavily involved in player personnel matters, with a critical role being to build the team, including bidding for and recruiting players. These presidents, often promoters or showmen, were the team's primary representatives to the media.

As the franchise president job evolved over the middle 25 years of the league, presidents became more removed from the limelight. Many presidents routinely said "No comment" when asked about anything involving the franchise.

A division about the president's job started to evolve at this time. A small but notable number of presidents began to focus on innovation, breaking from the traditional approach to the sport that had developed during the first 25 years. These innovator presidents gained a competitive advantage by reaching out and building their teams in different ways or by using new approaches to reach customers.

Another shift that started at this time and that continues today was the change from franchises being family businesses to corporately owned organizations. As franchises were purchased from the families, corporate representatives were assigned the president positions. These new presidents focused on managing the bottom line, sometimes at the exclusion of long-term growth. Often, the corporate presidents lacked the baseball background to perform industry-related duties; in the best situations, the presidents would rely on their baseball functional executives to perform these duties. In the worst situations, the presidents would attempt to perform these duties on their own, frequently resulting in the franchise struggling to perform competitively and alienating the customer base.

In recent years, the franchise president role has become more—though not fully—formalized as a career path. Today, presidents are more likely to have risen through the ranks and have experienced much of the development needed to be successful when assuming the franchise president role. Typical duties of the current franchise president include developing the organizational vision and mission, marketing the franchise, interacting with the chairman or owner, building the management team, building the fan base, community-building and driving special strategic projects such as stadium-building.

There is no formal job description that applies to all franchise presidents. Instead, some duties are shared across franchises while other duties are unique to a particular franchise (e.g., some presidents may operate similar to presidents of the past and be heavily involved in player personnel decisions, perhaps even holding dual titles of president and general manager).

Exercise Materials – Standard

League Newspaper Clippings (Distribute to all groups)

October 11. The league announced today that it set a new attendance record for the fifth straight year and seventh time in the last 10 years. More than 80,000,000 fans attended games hosted by the 30 teams.

The league commissioner announced that, “Our baseball league is becoming increasingly popular as we adapt to the needs of our longtime fans and invite new fans in to be a part of the action.”

Twelve teams have opened new stadiums in the last 10 years, and four more teams have plans to launch new stadiums in the next three years. All of the new stadiums have had nearly equal or greater seating capacity than their predecessors.

June 4. The league’s brand and media division announced today that it has reached agreement with a vendor to sell paperless regular season game tickets that can be received by cellular phone. All 30 teams will participate in the program, which will help the league better control ticket scalping. The league will not comment on how much is lost each year through ticket scalping, but conservative estimates place the annual loss at more than \$100 million.

According to the league’s head of brand and special media, the paperless game tickets “are a fluid process that makes the purchase easier for fans and provides a new outlet for purchasing tickets that is more consistent with today’s technology.”

The league’s brand and special media program has become extremely active and profitable in recent years. Successful initiatives in the last two years alone include the launching of franchise websites that follow a common standard and include interactive content, doubling the amount of daily interactive content available from the league’s central website, and partnering with several key advertisers to simplify the acquisition of league marketed paraphernalia.

“Look for partnerships to extend further over the next few years, with more focus on providing our customers online game experience interactivity. We will pull the interactive content from a centralized location and bring it directly to the customer, regardless of where he or she is.”

July 9. The league announced the hiring of John Cooperton as Head of Security – External Issues. Cooperton will focus on reducing the league’s risk associated with

external criminal activity such as gambling and ticket scalping. Recent rumors and investigations have suggested that several players may have had involvement with notorious gamblers. Additionally, the last three years have become increasingly challenging for security issues within the sport.

Cooperton explained, “My role is to ensure the credibility of the sport. Most of the stories about illegal activity are proven false or are overstated. We need to investigate these stories before they get out-of-hand and create unnecessary worry for our fans.”

Cooperton will work closely with each franchise, other sports leagues and the federal government. He is the third major hire in the league security department in the past eight months.

EXERCISE MATERIALS—GROUP 1: OWLETS

The Owlets' mission is to reach the pinnacle of success while balancing the needs of our fans with our desire to be a top competitor in our league. To fulfill this mission, we will:

- Be innovative in regard to both the product we provide our fans and the ways that we obtain talent for our organization.
 - Make wise choices in how we treat our team finances when it comes to fans and how we select already existing talent.
 - Act ethically in how we treat our fans and in our relationship with our talent.
-

March 20. The Owlets announced their promotions schedule for the upcoming season. The new season will include 40 games, an increase from 2007.

The number of promotions is the highest ever for the team and demonstrates a commitment to the fans and to the team's agenda of seeking out additional business community sponsorships.

Promotions will include the ever-popular Fireworks Night, following every Friday night home game; "Bring Your Pet to the Yard Day"; "Got A Light Night," where fans can donate their existing standard light bulbs and receive an energy-saving light bulb in return; and "Help Paint the Town Day," where a number of fans will be selected in a lottery held during the game and invited to assist in repainting the left-field wall. All fans in the lottery will be invited to help paint homes of senior citizens after the game.

August 1. State senators have been gathering information for a proposed "ticket tax".

If a ticket tax bill passes, it would add an 11 percent tax on tickets for entertainment events such as zoos, theater shows, concerts, museums, opera and professional sporting events. Opponents of the proposal say the tax is a "luxury tax" and that it drives away patrons and business.

Proponents believe it would help address the state budget crisis while avoiding budget cuts in educational programs. A version of the ticket tax has been proposed in other cities, usually without success. In the few instances where the ticket tax has been approved, ticket prices have increased as much as 15 percent.

Owlets Club President History

President	Years
James B. Smith	1920-1945
John Y. Johnson	1945-1946
Robert Williams	1946-1960
Michael T. Brown	1961-1990
William B. Moore	1991-1993
David F. Davis	1993
Richard N. Jackson	1993
Charles R. Parker	1994
Charles W. Garcia	1994-2008

Charles W. Garcia—President

Entering his 15th season with the club, Charles W. Garcia joined the club on October 24, 1994, as its ninth president. Some of Garcia's accomplishments include:

- Was the organizational lead in obtaining financing and coordinating the design for the new ballpark that opened in 1999.
- Spearheaded efforts to expand the fan base beyond the city and into the surrounding metro area, including other states.
- Serves as the organizational liaison to local business councils.
- Established standardization in organizational computerization.
- Prior to being named president, served as the club's strategic tax advisor for 14 years.

Team Year-by-Year Information since 1988

Year	Divisional Finish	Won-Loss	%age	League Attendance Rank	Attendance
1988	5th	70-92	.432	17th	1,455,821
1989	5th	72-90	.444	19th	1,365,956
1990	5th	74-88	.457	20th	1,304,211
1991	3rd	82-80	.506	18th	1,521,333
1992	3rd	81-81	.500	18th	1,567,099
1993	5th	55-107	.340	30th	821,306
1994	5th	58-104	.358	30th	818,704
1995	5th	62-100	.383	30th	1,061,078
1996	5th	64-98	.395	26th	1,255,888
1997	2nd	91-71	.562	15th	1,965,471
1998	2nd	95-67	.586	10th	2,397,546
1999	1st	100-62	.617	3rd (New Stadium Opened)	3,154,867
2000	1st (Won Title)	103-59	.636	3rd	3,156,902
2001	2nd	96-66	.593	3rd	3,164,005
2002	3rd	84-78	.519	7th	2,869,743
2003	1st	98-64	.605	4th	3,008,426
2004	2nd	90-72	.556	9th	2,756,872
2005	2nd	90-72	.556	10th	2,712,395
2006	4th	75-87	.463	14th	2,408,241
2007	3rd	81-81	.500	15th	2,412,654

EXERCISE MATERIALS—GROUP 2: ELVERS

The Elvers' mission is to provide the community with wholesome and affordable entertainment while excelling in our sport. In line with our mission, we believe in:

- Sharing with the community.
 - Hiring employees who appreciate family-oriented work.
 - Keeping baseball affordable.
-

May 14. The Elvers will unveil a new exhibit at the ballpark dedicated to the Hispanic players and coaches who have been with the organization.

The Elvers have started several programs specifically for their Hispanic fan base in the last 10 months, after reviewing league and local surveys that show the Hispanic community is one of the most underserved and underrepresented in terms of fan base. Other Elvers programs intended to reconnect with the Hispanic community include last season's Latin American Night, which featured Elver uniforms with the team and player names written in Spanish, and the establishment of a team grant to help build baseball fields in areas of the city with a large Hispanic population.

August 3. Today is the third anniversary of former Elver owner Rudy Worthslimmer's ill-advised and unfortunate racist and anti-Semitic comments. What has happened since that fateful day?

First, Worthslimmer sold the team in February 2006. Unfortunately, he managed to keep stirring the pot when he offered a half-hearted apology in which he expressed his belief that his earlier comments were accurate.

Second, the Elvers introduced stronger policies around employment law and created a new position dedicated to diversity.

Third, the team expanded community outreach efforts in an attempt to be more inclusive. Some progress has been made, but plenty remains to be done. Many local residents may not be aware the Elvers even exist.

As the team continues to disassociate itself from Worthslimmer's legacy, it continues to seek opportunities for further healing and progress.

Elvers Club President History

President	Years
Mark A. Alexander	1920-1925
Lloyd C. Mitchell	1925-1948
Lloyd W. Mitchell	1948-2000
R. Worthslimmer	2000-2006
Evelyn Diaz	2006-2008

Evelyn Diaz—President

Entering her third season with the club, Evelyn Diaz joined the club on February 8, 2006, as its fifth president. Some of Diaz's accomplishments include:

- Refocused organizational efforts on community outreach.
- Started Elvers Charity Fund in 2007.
- Serves on several boards of directors throughout the community.
- Directed efforts to restructure parts of the stadium.
- Lifelong Elvers fan.
- Prior to being named president, served as a foundation director that distributed more than \$200 million in grants over a 10-year period.

Team Year-by-Year Information since 1988

Year	Divisional Finish	Won-Loss	%age	League Attendance Rank	Attendance
1988	4th	77-85	.475	20th	975,000
1989	5th	72-90	.444	21st	943,411
1990	4th	77-85	.475	21st	986,908
1991	3rd	84-78	.519	16th	1,100,638
1992	2nd	94-68	.580	10th	1,642,389
1993	1st	95-67	.586	7th	1,987,678
1994	1st	97-65	.599	7th	1,921,282
1995	5th	86-76	.531	9th	1,534,555
1996	3rd	84-78	.519	12th	1,613,041
1997	3rd	79-83	.488	11th	1,782,285
1998	4th	78-84	.481	14th	1,661,618
1999	4th	77-85	.475	15th	1,786,633
2000	4th	73-89	.451	15th	1,864,119
2001	4th	75-87	.463	10th	2,026,041
2002	3rd	86-76	.531	8th	2,539,149
2003	1st	98-64	.605	3rd	3,077,400
2004	3rd	89-73	.549	4th	2,900,240
2005	2nd	90-72	.556	14th	2,115,412
2006	4th	88-74	.543	16th	1,763,008
2007	5th	73-89	.451	15th	1,804,956

EXERCISE MATERIALS—GROUP 3: AARDWOLVES

Aardwolves have one mission: Win at all that we do.

- Overpower the on-field competition through access to better personnel.
 - Build leading-edge approaches to targeting our fan base.
 - Invest more wisely than other league and community competitors to ensure a strong profit stream.
-

January 20. The Aardwolves are developing a 250-acre site that will include a new stadium, several restaurants and an amusement park, among other facilities. The stadium will be partially funded by the state and is expected to seat 43,000.

The design of the new stadium will capitalize on existing elements of the stadium location and highlight the history of Aardwolves baseball.

The new ballpark is expected to be completed for the 2011 season.

June 15. The Riverside City Council is in discussions with a group of private investors to bring an independent professional baseball team to the city. Independent league baseball has become increasingly popular over the last 10 years. In some cases, independent league teams have been established in or near cities that already host professional baseball teams. Locally, the Aardwolves play less than 25 miles from the proposed site for independent league baseball.

The city council is expected to consider the proposal over the next several months and vote on it in September 2009.

A similar proposal was considered in nearby Franklin in 2007 but never reached a vote. That group of investors is still interested in putting together another proposal over the next two to three years.

Aardwolves Club President History

President	Years
Eugene X. Bailey	1920-1931
Wayne T. Bryant	1931-1938
Virgil B. Hayes	1938-1957
Earl N. Rivera	1957-1971
Norman P. Gray	1971-1986
Seth Sanders	1986-2008

Seth Sanders—President

Entering his 22nd season with the club, Seth Sanders joined the club on January 31, 1986, as its sixth president. His accomplishments include:

- Restructuring the business side of the front office to gain efficiencies.
- Recruiting top performers from other franchises to work in front office.
- Streamlining accounting and finance operations in the organization.
- Enriching the international scouting academy for Aardwolves.
- Sanders was drafted as a pitcher right out of high school.

Team Year-by-Year Information since 1988

Year	Divisional Finish	Won-Loss	%age	League Attendance Rank	Attendance
1988	2nd	90-72	.556	22nd	1,200,365
1989	4th	73-89	.451	24th	1,567,787
1990	5th	63-99	.389	8th	2,132,821
1991	4th	71-91	.438	8th	2,136,988
1992	2nd	87-75	.537	12th	1,669,888
1993	1st	99-63	.611	15th	1,424,313
1994	5th	74-88	.457	17th	1,208,060
1995	3rd	85-77	.525	18th	1,115,749
1996	4th	72-90	.444	20th	1,045,651
1997	4th	77-85	.475	10th	2,002,357
1998	4th	72-90	.444	7th	2,934,154
1999	5th	59-103	.364	5th	2,681,156
2000	2nd	87-75	.537	5th	2,581,091
2001	3rd	86-76	.531	13th	1,697,398
2002	3rd	94-68	.580	13th	1,609,773
2003	2nd	85-77	.525	12th	1,676,403
2004	2nd	80-82	.494	10th	1,864,782
2005	2nd	80-82	.494	14th	1,391,146
2006	2nd	75-87	.463	14th	1,338,851
2007	1st	95-67	.586	11th	1,947,799

EXERCISE MATERIALS—GROUP 4: CAPYBARAS

The Capybara Vision

Members of the community will see us as the first option for their entertainment dollars and will appreciate the memories gained from attending our games.

Our long-term objectives include:

- Obtaining funding, within three years, to build a new stadium.
 - Introduce new customer-focused ticket package options within three years.
 - Develop, within two years, a promotional strategy and products that are unique and consistent throughout the season and that enhance the customer experience.
-

January 7. Economists at the state university presented a bleak economic outlook of the state's already struggling economy.

The personal per capita income in the state experienced a downturn for the third consecutive year and the state is a below-average-income state. Foreclosures and unemployment continue to rise in the state, and the population continues to decline.

June 1. The Capybara team's future looks as bleak as the state economy. According to a top baseball publication, the Capybaras farm system is rated as the worst in the league—which means that as the franchise's players leave because of retirement or free agency, the Capybaras will have to turn to outside the organization for help. Scouts from other organizations say the Capybaras have no immediate help on the way in the farm system, and are at least three to five years away from changing the situation. Of course, that presumes the Capybaras make all the right moves! It could be a long five years for fans of the franchise.

Capybaras Club President History

President	Years
Butler B. Barnes	1920-1962
Powell Y. Richardson III	1962-1975
Powell Y. Richardson IV	1975-1990
Edward Rogers	1990-1997
Nancy K. Hall	1997-2003
Juan L. Foster	2003-2008

Juan L. Foster—President

Entering his sixth season with the club, Juan L. Foster joined Capybaras on November 28, 2003, as its sixth president succeeding Nancy Hall. Some of Foster's accomplishments include:

- Preventing possible team relocation.
- Developing new procedures for spending that kept the team profitable.
- Setting the foundation for new business ventures for the franchise.
- Named Executive of the Year for the 2004 season.
- Prior to being named president, was vice president of stadium operations for the team

Team Year-by-Year Information since 1988

Year	Divisional Finish	Won-Loss	%age	League Attendance Rank	Attendance
1988	3rd	86-76	.531	9th	1,857,408
1989	1st	95-67	.586	8th	1,978,896
1990	3rd	87-75	.537	6th	2,397,131
1991	5th	74-88	.457	15th	1,608,509
1992	5th	66-96	.407	17th	1,360,265
1993	5th	73-89	.451	18th	1,265,041
1994	2nd	91-71	.562	13th	1,909,244
1995	3rd	87-75	.537	13th	1,923,238
1996	3rd	81-81	.500	12th	1,970,735
1997	5th	74-88	.457	15th	1,752,900
1998	4th	83-79	.512	17th	1,478,729
1999	2nd	92-70	.568	14th	1,857,314
2000	5th (Won Title)	69-93	.426	15th	1,688,080
2001	3rd	80-82	.494	17th	1,327,155
2002	4th	68-94	.420	16th	1,444,027
2003	4th	74-88	.457	14th	1,811,548
2004	5th	67-95	.414	15th	1,701,796
2005	4th	73-89	.451	17th	1,573,621
2006	5th	76-86	.469	18th	1,375,432
2007	5th	71-91	.438	19th	1,265,218

EXERCISE MATERIALS—GROUP 5: HEDGEHOGS

The Hedgehogs' mission is to be excellent in all activities in which we are involved. This includes our relationships with our fans, our business partners and our community. Everyone should feel proud of the Hedgehogs.

- Accountability.
 - Trust.
 - Loyalty.
-

August 3. Yesterday marked one of the darkest days in Hedgehog history when fans staged a sit-out to protest the apathy of Hedgehog front office personnel. Official attendance for yesterday's game was 806; more than triple that number protested outside the stadium. Average attendance for the Hedgehogs this year has been 11,200. The stadium seats 36,000.

For the last several years, fans have pleaded with the organization get the right players for the organization to become more competitive. The organization has its a strict financial policy that some believe has not only contributed to a player exodus for better pay but has squashed the team's ability to recruit free agents. At the end of the 2007 season, three of the organization's potential star players were traded, reportedly to avoid substantial pay raises.

Fueling fan ire was the team's decision to raise ticket prices by an average of 8 percent for the upcoming season. Fan feedback was so negative that Hedgehog owners retracted the announced increase.

August 11. Security concerns continue to hover over the Hedgehog stadium.

At the forefront: repeated sexual harassment allegations made by female fans seated in the bleacher section of the stadium. Despite several protests to the organization by female fans, outside of an investigation, little action has been taken by the club to prevent future incidents.

Fights in the stands have also received more notoriety. While some teams are curbing alcohol sales prior to the seventh inning, the Hedgehogs have elected to stay with the status quo. Even promotional giveaways like Bat Day and Hedgehog Stuffed Animal Day have gotten out-of-hand and resulted in injuries to fans or players.

Perhaps most disturbing, some say, is the lack of a security presence. Uniformed security is barely visible at the stadium. Signs are posted throughout the stadium

indicating a number to call in case of a security issue; however, attempts at three recent games to call the number resulted in no answer. Attempts to contact the Hedgehog front office had the same result.

Hedgehogs Club President History

President	Years
Andrew F. Watson	1920-1925
Lester D. Simmons	1925-1940
Maria B. Simmons	1940-1970
Frank H. King	1970-1996
George P. Russell	1996-1999
Paul T. Flores	2002-2004
C.W. Watson	2004-2006
Lewis Z. Long	2006-2008

Lewis Z. Long—President

Entering his third season with the club, Lewis Z. Long joined the club on July 18, 2006, as its eighth president succeeding C.W. Watson. Long's accomplishments include:

- Representing the franchise at ownership meetings.
- Serves on several league committees.
- Known for a no-nonsense approach to contract negotiations.
- Has worked in various functions for the organization for 28 years.
- His father, Ed, was a president of the Tortoise franchise.

Team Year-by-Year Information since 1988

Year	Divisional Finish	Won-Loss	%age	League Attendance Rank	Attendance
1988	4th	74-88	.457	18th	1,359,856
1989	3rd	86-76	.531	16th	1,714,893
1990	3rd	84-78	.519	17th	1,630,929
1991	3rd	84-78	.519	16th	1,785,293
1992	3rd	83-79	.512	17th	1,636,058
1993	2nd	92-79	.568	15th	1,829,636
1994	1st (Won Title)	101-61	.623	7th	2,704,794
1995	3rd	85-77	.525	10th	2,286,609
1996	3rd	87-75	.537	13th	1,899,437
1997	1st	98-64	.605	11th	2,067,830
1998	2nd	88-74	.543	11th	2,081,162
1999	5th	59-103	.364	20th	1,543,656
2000	4th	79-83	.488	21st	1,495,785
2001	3rd	84-78	.519	21st	1,641,661
2002	5th	75-87	.463	22nd	1,423,963
2003	3rd	85-77	.525	15th	1,971,421
2004	5th	53-109	.327	30th	1,168,610
2005	5th	76-86	.469	29th	1,365,157
2006	5th	65-97	.401	29th	1,409,391
2007	5th	67-95	.414	30th	1,202,829

EXERCISE MATERIALS—GROUP 6: CRAYFISH

As the Crayfish, our fans will see us swim.

We value our fans and demonstrate this through our belief that:

- Fans come first.
 - Respect must be earned and maintained.
 - Diversity is critical.
-

June 30. It's official. The Crawdads will become the Crayfish effective January 1.

Crawdads Vice President of Marketing Dave Prigero believes the new name will help the franchise to reposition itself. "We have a changing fan base and a changing sport. The organization felt it was time to change and make sure our fans understand what this team, the Crayfish, and this sport are really about in today's environment. Too often, fans think of our team and think of the past."

The rebranding will cost the team several million dollars. It is anticipated that much of the rebranding cost will be recouped through new merchandise sales.

March 4. Tide Pool City continues to watch residents make an exodus for the suburbs. The city population, once as high as 3 million people, is less than 1 million today.

Research indicates that a main reason that residents are moving from cities to the suburbs is because of the reputation of schools. As a result of the city's shrinking tax base, Tide Pool City has had trouble funding its schools in recent years, a trend that some say attributes to the city's poor rankings in state surveys of academic success.

According to Kay Stern, the vice president of community relations for the Tide Pool City Crayfish, "It is important that the city deal with this exodus. Younger residents will move here or stay here if we can provide diverse entertainment options and affordable housing."

Additionally, it is important that the city find ways to add jobs. A city task force has been formed to address and reverse the shrinking population situation.

Crayfish Club President History

President	Years
Scotland T. Perry	1920-1936
Larry H. Wood	1936-1946
Greg Walker Peterson	1946-1962
Kelly E. Morris	1962-1980
David F. Davis	1980-1991
Alvin R. Bell	1991-1997
Jacob W. Adams	1997-2001
Thomas G. Liu	2001-2008

Thomas G. Liu—President

Entering his eighth season with the club, Thomas G. Liu joined the Crayfish on December 8, 2001, as its eighth president succeeding Jacob W. Adams. Liu's accomplishments include:

- Leading the charge for rebranding the franchise.
- Holding monthly online forums with fans to discuss Crayfish issues.
- Serving as co-chair of the Tidal Pool City Business Revitalization Association.
- Campaigned to bring the league's "Player Showcase" game to Tide Pool City in 2002.
- Prior to being named president, served as vice president of marketing and sales.

Team Year-by-Year Information since 1988

Year	Divisional Finish	Won-Loss	%age	League Attendance Rank	Attendance
1988	4th	74-88	.457	16th	1,432,633
1989	2nd	87-75	.537	8th	1,755,386
1990	1st	88-74	.543	1st	2,523,575
1991	5th	65-95	.406	2nd	2,297,327
1992	1st	93-69	.574	1st	2,807,360
1993	4th	70-92	.432	2nd	2,555,016
1994	3rd	81-81	.500	2nd	2,402,997
1995	2nd	90-72	.556	2nd	2,567,427
1996	2nd	92-70	.568	2nd	2,655,872
1997	4th	75-87	.463	2nd	2,696,299
1998	4th	75-87	.463	2nd	2,340,925
1999	2nd	91-71	.562	2nd	2,647,291
2000	3rd	80-82	.494	2nd	2,555,688
2001	3rd	81-81	.500	2nd	2,416,236
2002	4th	72-90	.444	8th	2,065,444
2003	4th	71-91	.438	5th	2,057,460
2004	4th	73-89	.457	10th	1,820,521
2005	2nd	84-78	.519	10th	1,767,330
2006	3rd	85-77	.525	13th	2,519,107
2007	5th	70-92	.432	17th	2,253,123

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