Perhaps one of the most important things that a school may do for its students is to provide a safe space for debate where no holds need be barred, where ideas and information may be presented and examined in the spirit of intellectual inquiry, where critiques may be offered unburdened by politics or prejudice. Students may play with revelations without playing with fire in this training ground for the pursuit of knowledge.

A whistleblower exposes unethical dealings. A biographer writes a book that changes public perception of a well-known figure. A scientist reveals findings that pit industry profits against public health. Releasing information into the light of day can be an act of aggression. It can also be an act of humility, as what is made public undergoes sometimes brutal scrutiny. Then the salutary effect of the light of day seems to turn into an uncomfortable glare.

Perhaps one of the most important things that a school may do for its students is to provide a safe space for debate where no holds need be barred, where ideas and information may be presented and examined in the spirit of intellectual inquiry, where critiques may be offered unburdened by politics or prejudice. Students may play with revelations without playing with fire in this training ground for the pursuit of knowledge.
"An ordinary allotrope of carbon can be converted to a diamond if it gets the right treatment. Similarly, a good student can become better if he or she can find the right place to hone his or her skills. At Weatherhead, I am a part of a diverse community that strives to make good use of a range of resources at its disposal to succeed as never before. Everything at Weatherhead—the Peter B. Lewis Building that houses the business school, the faculty, the student body, and our sustainability and design curriculum—serves as a source of inspiration to me. Each day, as I get closer to earning my MBA, I learn or discover something new. I am being trained to become a leader who can tackle business problems in an ethical and socially responsible way. I am able to truly live the MBA experience at Weatherhead!"

**Indrajeet Ghatge**
MBA '12

"William Barclay said, 'There are two great days in a person’s life: the day we are born and the day we discover why.' In 2009, I chose to pursue my MBA at Weatherhead because I was convinced that business is the only force in the world that will be able to make positive change at the scale needed. Now, working for Weatherhead’s Fowler Center for Sustainable Value, it is a privilege to work for an organization that helps me fulfill my ‘why.’ The Fowler Center’s goal is to produce scholarship and practice that helps business solve the world’s growing social and environmental problems—and to produce the positive change that I hoped for."

**Beau Daane**
Manager, Fowler Center for Sustainable Value

"I feel very blessed to be part of the undergraduate community at Weatherhead. The innate caliber of our students, along with their diverse backgrounds, talents, and interests, couples with our small class sizes to provide the foundation for a very intimate educational experience. Students are challenged to grow not only in terms of theoretical and practical business knowledge, but also in their commitment to ethical business leadership, global citizenry, and positive stewardship of the planet’s resources."

**Karen Braun**
Associate Professor, Accountancy
### Full-Time MBA Among the 30 Best Design Programs in the World

*Bloomberg Businessweek*, 2009

### MBA Institute in Sustainable Value and Social Entrepreneurship among the 10 Most Innovative Business School Courses

*Forbes*, 2010 – U.S.

### #8 Undergraduate Macroeconomics Program
### #9 Quantitative Methods
### #17 Microeconomics
### #23 Finance

*Businessweek*, 2011 – U.S.

### #24 Undergraduate Accountancy Program

*Public Accounting Rankings*, 2009 – U.S.

### #28 Undergraduate Business Program


### #40 Undergraduate Business Program

*Businessweek*, 2011 – U.S.

### #49 Full-Time MBA

*Forbes*, 2011 – U.S.

### #51 Full-Time MBA

*Businessweek*, 2010 – U.S.

### #55 Full-Time MBA in the World
### #32 in the U.S.

*Expansión/CNN*, 2011 – Global

### #63 Full-Time MBA

*Beyond Grey Pinstripes*, 2011 – Global

### #80 Full-Time MBA


### #14 Part-Time MBA
### #5 in the Midwest

*Businessweek*, 2009 – U.S.

### #29 Part-Time MBA


### #21 Executive MBA
### #16 in the U.S.

*Businessweek*, 2009 – Global
WE ARE HONORED TO PRESENT AN EDITORIAL BY PETER M. SENGE, PHD, SENIOR LECTURER IN LEADERSHIP AND SUSTAINABILITY AT THE SLOAN SCHOOL OF MANAGEMENT AT THE MASSACHUSETTS INSTITUTE OF TECHNOLOGY (MIT). DR. SENGE RECENTLY JOINED THE BOARD OF DIRECTORS OF THE FOWLER CENTER FOR SUSTAINABLE VALUE AT WEATHERHEAD. THE FOUNDER OF THE SOCIETY FOR ORGANIZATIONAL LEARNING (SOL), SENGE IS THE AUTHOR OF MANY SEMINAL BOOKS AND ARTICLES, AMONG THEM THE NECESSARY REVOLUTION: HOW INDIVIDUALS AND ORGANIZATIONS ARE WORKING TOGETHER TO CREATE A SUSTAINABLE WORLD. SENGE WAS THE KEYNOTE SPEAKER AT THE FOWLER CENTER CELEBRATION ON MAY 5, 2011, WHERE HE DISCUSSED THE UNIQUE PRIVATE-NONPROFIT COLLABORATION ON WHICH HE ELABORATES IN THIS EDITORIAL.

PARTNERSHIPS THAT REVEAL

PETER M. SENGE, PHD
Senior Lecturer, Leadership and Sustainability
MIT Sloan School of Management
Founder, Society for Organizational Learning
MIT, where I teach and do research at the Sloan School of Management, just celebrated its 150th birthday, and for the closing session of the Sloan School’s celebration, I had the honor of hosting a conversation between Dame Barbara Stocking, CEO of Oxfam Great Britain, and Paul Polman, CEO of Unilever. The focus of our conversation was the historic partnership between the two organizations, which has now lasted over a decade. To me, this partnership—the kind of relationship that is at the heart of Weatherhead’s Fowler Center’s mission—is nothing less than a revelation of the future of both business and civil society.

Let me explain by taking a few steps back...to the days before supermarkets, processed food, and bottled water. The food industry—which represents half of Unilever’s business—is a paragon of everything that has gone wrong with global industrial expansion.

We have lost half the topsoil in the world during the Industrial Age as a result of short-term farming practices that emphasize productivity now while sacrificing the long-term health of the soil. Moving from earth to water, no less than two-thirds of the world’s fresh water, our scarcest resource in terms of present and prospective human needs, goes to agriculture.

The social side effects of agribusiness are no less sobering: over 50 million people a year migrate from traditional rural communities to live in slums and shantytowns around the developing world, largely because they no longer have viable rural economies to support them. And, at the end of the day, no one really wants—or at least, ought to want—to eat our artificially modified foods, the source of a litany of health problems like childhood obesity.

Standing in opposition to these devastating trends are environmental and social justice activist organizations like Oxfam, which aim to transform the structural causes of rural poverty and injustice. You might think that an organization like Oxfam and a corporation like Unilever would have nothing in common.

And you would have been right—until about 10 years ago, when they started working together.

Unilever is one of the world’s largest food companies, and when it moves, it creates huge waves. So it is no small matter that Unilever has committed to source materials for all its products “sustainably,” to reduce its environmental footprint while doubling sales, and to bring a half million small holders into its global supply chains by 2020. Unilever is at the forefront of a growing awakening to halt the industry’s “race to the bottom.”

Meanwhile, organizations like Oxfam must also evolve. Mission-driven nonprofits have exploded in number globally over the past 20 years or so. But this revolution that “no one saw coming,” in the words of American writer and environmental activist Paul Hawken, is still groping for its core mission. Many such organizations, including Oxfam, have found themselves entrenched in a battle against global corporate dominance. Yet how much change can come from fighting against? At some point, says Stocking, “We have to go back to what we actually stand for, transforming the conditions that perpetuate rural poverty.”

And another thing that was in evidence at the MIT event was the power of partnership itself. I couldn’t help noticing that Stocking (this icon of civil society) and Polman (a captain of global business) happily interrupted each other, challenged one another, and even laughed at each other’s jokes. They actually seemed to like one another. So the biggest revelation of all might be the simple fact that friendship trumps economics, and that people with the humility to understand that they can learn from one another may still prove the most powerful force for systemic change.

I share this story with you because I believe it illustrates the Fowler Center’s commitment to blending knowledge and expertise in just this way in order to tackle the world’s most challenging problems. I look forward to supporting the center as it strives to foster the wider spread of such radical collaboration in favor of our common future.
FEATURE STORIES
Thinking Big: The Master of Science in Positive Organization Development and Change ................................................................................................................................................................10
A Scandinavian Design Experience Beyond IKEA: Akhila Skiftenes and Tim Anderson Attend a Danish Design Camp ..................................................................................................................................................................30

FACULTY PROFILES
Coordination and Choral Music: John Paul Stephens, PhD, Assistant Professor of Organizational Behavior, Explains the Aesthetics of Organizing .................................................................23
SOX Experiments: Yi-Jing Wu, PhD, CPA, Assistant Professor of Accountancy, on the Best Protection for Investors ..................................................................................................................................................44

FACULTY IN THE FIELD
Susan Helper, PhD, Frank Tracy Carlton Professor of Economics, and her current auto industry research; Peter Ritchken, PhD, Kenneth Walter Haber Professor and Professor of Banking and Finance, and his Cleveland Fed model of inflation; and Susan S. Case, PhD, Associate Professor of Organizational Behavior, and her latest paper on business ethics informed by the major monotheistic religious texts ........................................................................................................48

EXECUTIVE EDUCATION
Exec Ed Overseas: Melvin Smith and Scottish Enterprise Spread the Word on Resonant Leadership ..................................................................................................................................................56

DONOR NEWS
The Fowler Center Celebration .............................................................................................................................................................................................60

COLUMNS
Weatherhead by the Numbers .................................................................................................................................................................................................03
Editorial by Peter Senge, PhD, Senior Lecturer in Leadership and Sustainability, Massachusetts Institute of Technology .................................................................................................................................................04
Calendar of Events ........................................................................................................................................................................................................09
Weatherhead in the News ...............................................................................................................................................................................................................16
Weatherhead by Department ...........................................................................................................................................................................................................36
Welcoming New Alumni Advisory Council Members ..........................................................................................................................................................62
Alumni on the Move ........................................................................................................................................................................................................64
## Calendar of Events

### DECEMBER

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
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| 09   | 2011 David A. Bowers Economic Forecast Luncheon  
Sam Thomas, PhD, Professor of Banking and Finance, will analyze business and financial news and provide insight into the current state of the economy during the 38th Annual David A. Bowers Economic Forecast Luncheon. |
| 12-13 | Fowler Center Sustainability Circles Launch  
In partnership with True Market Solutions, the Fowler Center for Sustainable Value works with small and medium sized enterprises (SMEs) to help them improve their financial performance by fully embracing sustainable business practices. |
| 13   | Alumni Reception, Philadelphia, PA  
Clare Frissora, EMBA ’98, and Jim Hilyard, MBA ’70, cordially invite you to join Dean Mohan Reddy and Weatherhead staff for a cocktail reception. Mingle and enjoy complimentary hors d’oeuvres and beverages while networking with fellow Weatherhead alumni. |

### JANUARY

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| 27   | Executive MBA Open House  
Guests are invited to join Michael Devlin, Associate Dean; EMBA program staff; and current students and alumni for an information session, a chance to sit in on a class, and an open house reception. |

### FEBRUARY

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| 06   | Appreciative Inquiry: Leveraging Strengths for Transformative, Lasting Change  
Immerse yourself in the methods, tools, and practice of AI to develop your capability as a leader for positive change in any setting. |
| 17-18 | Dean’s Weekend  
Prospective students are invited to join Dean Mohan Reddy and Weatherhead faculty and staff in immersing themselves in our school’s unique environment. |

### MARCH

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| 13   | WMPOD Open House  
Learn about our unique master of science program with Harlow Cohen, PhD, Professor of Organizational Behavior and Faculty Director of the MPOD program. |
| 20   | University Commencement |

### MAY
Renee, for her part, recalls meeting Dr. Richley at the launch of a local cooperative business. By the end of their first conversation, the two had planted the seeds of collaboration. Richley invited Renee to take part in a Weatherhead practicum, Building the Sustainable Enterprise. A hands-on component of the Master of Science in Positive Organization Development and Change, or MPOD, program, the class pairs student consulting teams with businesses and nonprofits that take sustainability seriously.

Renee’s company, Cosmic Bobbins, employs people in Cleveland and Mexico who create one-of-a-kind, handmade accessories from waste materials. Renee came up with the product line, which includes handbags, desk accessories, picture frames, and other designs woven from waste paper, while living in Mexico.

“I met artisans in a tiny town outside Mexico City where there is no running water, no access to services, and where children go to school only if their parents are able to pay for their education,” Renee recalls. “I thought, maybe this indigenous craft could be streamlined for the U.S. market.”

Back in Cleveland, Renee made connections with local nonprofits to launch her business. She offered employment separating and categorizing colorful magazine pages to clients of United Cerebral Palsy (UCP). University Circle Inc. and Cleveland Botanical Gardens each commissioned a special line of accessories made from leftover annual reports and membership magazines. And Cosmic Bobbins is one of just two new vendors that Paul Mitchell has contracted with in the past five years. That partnership grew out of a simple haircut.

“Bonnie Richley has changed my life,” says Sharie Renee, owner of Cleveland-based lifestyle brand Cosmic Bobbins. “She’s like my cosmic sister.”

For Bonnie Ann Richley, PhD, Assistant Professor of Organizational Behavior, teaching at Weatherhead is a springboard to touch (and, yes, change) many lives. Her unflagging energy, on top of an impressive array of academic and consulting experience in the U.S. and abroad, wins the admiration of students and community members alike.
“I go to a Paul Mitchell focus salon in Ohio City, and got to talking with my hairdresser about trying to create a brand where business and social good connect,” Renee says. “She said, ‘You have the same company culture as Paul Mitchell. Why don’t you come and play with us?’”

Cosmic Bobbins’ line of accessories for Paul Mitchell includes a custom shear case for stylists.

Hannah Strange, who belongs to MPOD6 (the class of 2011), was drawn to Cosmic Bobbins in part because, herself a keen seamstress and former owner of a handbag company, she knew exactly what Renee faced in starting an accessories business.

“Sharie is someone with a big vision who needed one-on-one support to make it sustainable. I had a direct personal connection to the project and know how daunting running a business can be. Plus, her products are really beautiful,” Strange says.

The MPOD team—which included Strange, Eric Bailey, Rosalie Carpenter, Sarah Duffy, Kavitha Iyer, and Emily Miller—began by helping Renee write a vision statement that she can incorporate into promotional materials and, more importantly, look to when the everyday challenges of running a business single-handedly distract from her mission.

Says Strange, “We started with a reminder of the passion, heart, and commitment Sharie brings to Cosmic Bobbins, helping her to feel grounded in what she’s trying to do and reconnected to the story that she’s trying to tell.”

“Next, the team provided a day-long strategy and operations training for Renee. “We basically helped [Renee] draft a map to get her business where she wants it to be,” says Strange.
“When you are trying to wear all the hats, some components slip through the cracks,” says Renee. “Because I was innovating this out of thin air, I’d been focusing the whole time on proof of concept. The MPOD students worked with me on a business plan and showed me what a model could look like for growth and development.”

Renee recalls as particularly eye-opening an exercise involving an organizational learning chart that modeled the business 30 days out, 3 months out, 6 months out, 12 months out, and 18 months out.

“Basically, I brain drained tasks onto Post-Its, then tried to prioritize them, placing them at different points along the timeline,” Renee says. “When I stepped back, I saw that I had put everything in the 30-day category! The students said, ‘You put it all on the top line like it needs to be done this week.’ I said, ‘If there was a line for last week, that’s when these things needed to be done!’”

The students encouraged Renee to break larger endeavors, like creating a website, into small, manageable steps.

“When you go shopping, you don’t write ‘grocery store’ on your list,” Renee says, smiling. “You’ve got to break it down.”

Renee says she would jump at the chance to work with MPOD students again. Looking back, she summarized the experience in one word: “Wow!”

While Strange and her teammates helped Renee grow her business, another team helped grow vegetables. MPOD6 students Scott Anthony, Scott Hinton, Tineke Kuijper, Delia Mannen, Todd Porter, and Brandon Rogers assisted a local nonprofit coalition in designing and planting a community garden. The students created a documentary video, a white paper, and an online academic resource—but not until after getting their hands dirty.

Richley remembers that when she first checked in with the team, they informed her, “We’re doing a lot of digging right now.” Richley assumed at first that “digging” meant research—but her students dispelled that notion.
They meant, of course, that they were literally digging in the garden! she explains delightedly.

The Edible Forest Garden is a project of the Intergenerational School (TIS), a Cleveland charter school, and Fairhill Partners, a nonprofit center committed to lifelong learning, intergenerational relationships, and successful aging. Forest gardens are traditional in many climates and cultures and are becoming better known in Europe and North America. Crops are planted in imitation of a woodland, with “layers” of trees, shrubs, and ground cover that produce food. The resulting tiered garden should have greater yields, while requiring less maintenance, than a similarly-sized flat garden plot.
The opportunity to act as gardener-consultants was a draw for Scott Anthony. "I was attracted to the tangible nature of the work," he says. "I was excited to make something physically manifest."

Food from the forest garden will be served in TIS’s cafeteria and at Judson Park, a nearby home for the elderly. According to Anthony, the idea for the garden took root, so to speak, in an encouraging cultural climate in which "urban gardening is in vogue, and the local food movement is gaining momentum."

Team member Delia Mannen, who is simultaneously completing a Master of Research degree at ESADE in Barcelona, adds, “The interaction of different generations was refreshing to witness. I don’t think it happens enough in America. In Spain, three generations walk together to the market, shop together, and pick kids up from school together.”

The contrast between the American attitude toward aging and the Spanish view persists even in language, says Mannen. “For example, the word retirement sounds like expire, lie down, rest. Their word—jubilaciôn—is about celebration.”

Issues of sustainability, nutrition, education, and elder care quickly emerged as drivers in what might have seemed a simple landscaping project. "Understanding the whole system and hearing the voices of constituents produces better results," Anthony says.

The whole-system perspective and emphasis on communicating with stakeholders are characteristic of the MPOD program. Team member Todd Porter points out that the program also presents a rare take on sustainability. “The concept of a forest garden, for example, is to design it so that it is self-sustaining with minimal maintenance. When you look at the potential for long-term growth in organizations, businesses, or societies, this kind of thinking is very relevant,” says Porter. “It’s almost like I learned more about the MPOD curriculum from the garden project than the other way round!”

Anthony agrees that the program offers a unique, flexible blend of skills and knowledge: “My key takeaway from this program is that the MPOD is as good for corporate leaders and business management as for anyone in HR, consulting, or academia.” He continues with a laugh, “If I really wanted to chest beat a little bit, I would close with: ‘As math and science are to MIT, organization development is to Case Western Reserve and Weatherhead.’“
WEATHERHEAD IN THE NEWS

AL WEATHERHEAD’S VISION CARRIES ON

On October 13, 2011 Case Western Reserve University President Barbara R. Snyder announced $80 million in new funding pledges, bringing the total to $663 million raised toward a $1 billion initiative entitled “Forward Thinking: The Campaign for Case Western Reserve University.” The single largest commitment announced at the campaign launch is a $50 million pledge from the Weatherhead Foundation, a philanthropic organization headed by industrialist Albert J. Weatherhead III until his death the previous month. This generous commitment, announced by Weatherhead’s wife Celia Weatherhead, is the single largest in university history, and will be split evenly between the Weatherhead School of Management and the new Weatherhead Institute for Family Medicine and Community Health.

“We are deeply grateful and moved by Al and Celia’s commitment to advancing our school’s ambition to transform management education,” says N. Mohan Reddy, PhD, Dean, Albert J. Weatherhead III Professor of Management, and Professor of Marketing and Policy Studies. “Throughout my tenure, Al served as an inspiration, an advisor, and a friend. I have always had the greatest admiration for the Weatherheads and for their shared philanthropic vision. Al will be greatly missed, but we are honored to carry on part of his legacy.”

WEATHERHEAD MBA CANDIDATE BLOGGING FOR FINANCIAL TIMES

Julia Steinberg, MBA ‘12, is blogging about her business school experiences over the course of academic year 2011-12 for the prestigious news outlet the Financial Times. Steinberg, who has a background in communications and fashion, is interested in transitioning post-MBA to a marketing and PR role. Look for her blog entries on blogs.ft.com.

WEATHERHEAD CLIMBS TO #28 IN U.S. NEWS RANKINGS

Weatherhead gained the #28 slot among undergraduate business programs in U.S. News & World Report’s Best Colleges 2012, while Case Western Reserve University as a whole ascended to #38 in the nation. The business rankings, which saw Weatherhead climb from #34 in the 2011 edition, are determined by surveying academic leaders in the field.

WEATHERHEAD AMONG FORBES’ TOP 50 MBA PROGRAMS NATIONALLY

Weatherhead placed #49 in the nation in the newly released Forbes magazine MBA rankings. Forbes ranks full-time MBA programs every other year based in large part upon student return on investment.

“We are pleased to be recognized among the top 50 business schools in the nation,” says N. Mohan Reddy, PhD, Dean and Albert J. Weatherhead III Professor of Management and Professor of Marketing and Policy Studies. “We work hard to ensure that our graduates can expect significant return on their investment in their education, and I believe that our Forbes placement reflects the payoff of that commitment.”
HONORS AND LEADERSHIP TRANSITIONS FOR WEATHERHEAD FACULTY

Susan Helper, PhD, Professor of Economics, was named Frank Tracy Carlton Professor. Previously AT&T Professor in Economics, she stepped down as Chair of the Economics Department and was succeeded in that role by Scott A. Shane, PhD. A. Malachi Mixon III Professor of Entrepreneurial Studies and Chair and Professor of Economics. C.N.V. Krishnan, PhD, Associate Professor of Banking and Finance, was named Deborah and David Daberko Fellow. Meanwhile, Anurag Gupta, PhD, Chair and Professor of Banking and Finance, replaced J.B. Silvers, PhD, John R. Mannix Medical Mutual of Ohio Professor in Health Care Finance and Professor of Banking and Finance, as department chair. In addition, Jennifer L. Johnson, Associate Professor of Marketing and Policy Studies, succeeded Julia E.S. Grant, PhD, Professor Emerita of Accountancy, as Associate Dean of Undergraduate and Integrated Studies. Simon Peck, PhD, Associate Professor of Marketing and Policy Studies, was appointed Faculty Director of the Full-Time MBA. Tony Lingham, PhD, Associate Professor of Organizational Behavior, has taken on the role of Faculty Director of the Part-Time MBA.

NEW FACULTY JOIN ACCOUNTANCY, BANKING AND FINANCE, ECONOMICS, AND MARKETING

Weatherhead welcomes five new members to its faculty. Michele Meckfessel, CPA, Assistant Professor of Accountancy, pending PhD, comes to us most recently from Virginia Tech; her research interests include corporate tax aggressiveness and the impact of corporate disclosure readability. Dasol Kim, PhD, Assistant Professor of Banking and Finance, investigates the behavior of startup firms; his research is currently sponsored by the Kauffman Foundation. Dr. Kim comes to us from Yale. Our economics faculty welcome colleagues Mariana P. Carrera, PhD, Assistant Professor of Economics, and Justin Gallagher, PhD, Assistant Professor of Economics, both of whom obtained their doctoral degrees from the University of California–Berkeley. Dr. Carrera’s research interests lie in health economics and behavioral economics, while Dr. Gallagher studies environmental economics and applied microeconomics. Finally, Casey Newmeyer, PhD, Assistant Professor of Marketing and Policy Studies, joins us from the University of Pittsburgh and researches brand partnerships and alliances. Her background also includes marketing roles in the private sector.

GARY PREVITS NAMED DISTINGUISHED UNIVERSITY PROFESSOR, ELECTED TO ACCOUNTING HALL OF FAME

Gary J. Previts, PhD, CPA, E. Mandell de Windt Professor in Leadership and Enterprise Development and Chair and Professor of Accountancy, was recognized with two momentous honors for his outstanding academic and professional work. Dr. Previts was named Distinguished University Professor, the highest honor that a university may bestow on a faculty member. He is the second member of Weatherhead’s faculty to receive this extraordinary honor, which is granted to no more than 3% of the university’s tenured faculty.

In addition, Previts was elected to the Accounting Hall of Fame at The Ohio State University at the American Accounting Association Ohio Region Meeting in May, 2011. There is no greater tribute to the work of an accounting professional than be elected to the Hall of Fame, and this honor places Previts among the greatest names in the discipline. Fewer than 90 people have been elected to the Hall of Fame over its 60-year history.

NEW STUDY BY SUSAN HELPER ON U.S. AUTO MANUFACTURING REVEALS STATE OF PLAY

Susan Helper, PhD, Frank Tracy Carlton Professor of Economics, recently completed data collection for a study called “The U.S. Auto Supply Chain at a Crossroads: Implications of an Industry in Transformation,” and her conclusions on the need for what she describes as “collaborative relationships at all tiers of the supply chain” have been discussed across industry publications such as Automotive Technology, Torque News, Supply Management, and Supply Chain Standard. Her study has received attention from regional and national media, including on television news programs across Ohio and in New York, Pennsylvania, Georgia, Tennessee, Texas, Nebraska, and Wisconsin. Dr. Helper also spoke with WKSU, the Kent State University NPR affiliate station, on August 22, 2011, and with the Financial Times on September 12, 2011. Helper also moderated a panel on the outlook for automotive manufacturing and technology jobs at Driving Change: Greening the Automotive Workforce, a conference held in Dearborn, MI, on May 3-4, 2011. For more on Helper’s research into the changes affecting the automotive industry, turn to page 48.
WEATHERHEAD CHOSÉN TO HOST FIRST ANNUAL CONFÉRENCE OF NEW EXECUTÍVE DOCTORATE COUNCIL

Professional doctoral programs span the boundaries of academic theory and practical applications, developing scholarly practitioners by focusing on engaged research into contemporary business and management problems. These programs demonstrate ways in which experience acquired by executives in the business world can be enhanced through academics.

The mission of the recently established Executive Doctorate in Business Administration (EDBA) Council is to foster excellence and innovation in executive doctoral degree programs worldwide. The council selected Weatherhead to host its first annual International Conference on Engaged Management Scholarship June 2-5, 2011. The conference attracted around 60 participants from around the world, reflecting the globalization of business and the widespread appeal of executive doctoral programs.

Speakers at the conference included well-known engaged management scholars such as Weatherhead’s David L. Cooperrider, PhD, Fairmount Minerals Professor in Social Entrepreneurship and Professor of Organizational Behavior; Jean M. Bartunek, PhD, Robert A. and Evelyn J. Ferris Chair and Professor of Organization Studies in the Carroll School of Management at Boston College; and Gahl Berkooz, PhD, who founded and leads the Business Information Standards and Integration area at Ford Motor Company.

The EDBA Council is the only organization globally that focuses exclusively on executive doctoral degree programs and their issues. These programs are directed at fully employed, experienced professionals with more than 15 years of meaningful post-baccalaureate work experience, most of whom already possess an MBA or equivalent graduate degree.

“There is no single venue currently at conferences for management practitioner scholars to come together and discuss their research. This conference provides an opportunity for students in professional doctoral programs worldwide to present interdisciplinary applied research,” says Kalle J. Lyytinen, PhD, Iris S. Wolstein Professor in Management Design, Professor of Information Systems, and Faculty Director of the Doctor of Management program.

JOE AMMON LEADS TEAM TO VICTORY AT BETA ALPHA PSI NATIONAL MEETING

Joe Ammon, BS/MAcc ’12, was part of the winning team at the annual Beta Alpha Psi Project Run With It case competition held in August 2011 in Denver. There were 60 participants in all, grouped into 15 teams tasked with answering a request for proposals by a cooperative of five Denver nonprofits. The winning proposal that Ammon’s group presented at the national meeting garnered a prize of $1,000 for each team member’s Beta Alpha Psi chapter as well as a commemorative plaque.

“Participants came from all across the country,” says Ammon, whose teammates came from the University of Southern California at Fullerton, Bradley University in Peoria, Illinois, and Suffolk University in Boston. “We had to apply to be part of the competition, and it was an honor just to be selected. Everyone brought their ‘A’ game.”

The Beta Alpha Psi Board of Directors recognized Weatherhead’s chapter internationally as a Superior Chapter in 2010-11, reflecting the leadership of Mark H. Taylor, PhD, CPA, Professor of Accountancy, and the commitment of student members.

U.S. NEWS CONSULTS DIANA BILIMORIA ON GENDERED PAY GAP

A new study by Catalyst, a nonprofit that works to increase opportunities for women working in business, found that women with MBAs earned less than men with the same qualification. The average disparity across all industries was found to be $4,600 annually in men’s favor, and the earnings gap was accompanied by more limited opportunities for advancement and for building relationships with mentors.

U.S. News & World Report spoke with Diana Bilimoria, PhD, Professor of Organizational Behavior, about these findings for a June 15, 2011 article entitled “Business Schools Hope to Shatter Sturdy Glass Ceiling.” Dr. Bilimoria told the magazine that it is crucial that women start out on the right foot post-MBA by negotiating a salary commensurate with their qualifications. Bilimoria’s course Women in Organizations helps MBA students learn this and other important skills for climbing the corporate ladder.
Richard E. Boyatzis, PhD, Distinguished University Professor, H.R. Horvitz Professor in Family Business and Professor of Organizational Behavior, and Anthony Jack, PhD, Assistant Professor of Cognitive Science, Philosophy, and Psychology at Case Western Reserve and Director of the Brain, Mind and Consciousness Lab, announced the results of a study conducted using functional magnetic resonance imaging (fMRI) technology to look inside the brain of a person receiving coaching. The resulting article, “Coaching with Compassion: An fMRI Study of Coaching to the Positive or Negative Emotional Attractor,” was met with acclaim at a recent Academy of Management Annual Meeting, where it received a Best Paper award.

Dr. Boyatzis and Dr. Jack found that encouragement improves cognitive function, causing the recipient’s brain to “light up,” while criticism causes the recipient to “close down” cognitively. When student volunteers were encouraged to envision a positive future for themselves, the resulting fMRI images displayed marked activity in parts of the brain associated with vision, positive emotion, and imagination. When those same volunteers received advice that focused on correcting their shortcomings and addressing their problems, on the other hand, their visual cortex was much less active. The conclusion that managers and mentors in all walks of life can draw, says Boyatzis, is that positive coaching is an effective way of eliciting sustainable change.

WEATHERHEAD STUDENTS PLACE 1ST AND 2ND AT ACG CASE COMPETITION

Three teams from the Weatherhead School of Management participated in a day-long merger advisory competition hosted by the Cleveland chapter of the Association for Corporate Growth (ACG) on January 21, 2011. The teams had a week leading up to the competition to prepare analyses of a real-world merger case developed by Houlihan Lokey, a boutique investment banking firm based in Chicago and Los Angeles. At the competition, each team made a 20-minute presentation to a panel of judges playing the role of the owners and board of directors of the company. The panel included senior professionals from investment banking, consulting, and private equity firms such as KeyBanc Capital Markets and Blue Point Capital Partners.

Weatherhead students competed against teams from the University of Akron, Baldwin-Wallace College, Cleveland State University, John Carroll University, Kent State University, and The Ohio State University. Weatherhead team Andrew Gibbons, JD/MBA ’12; Anand Gomes, MBA/MSM-Finance ’11; Bernardo Orellana Heredia, MBA/MSM-Finance ’11; Jay Vaidya, MBA/MSM-Finance ’12; and Hui Wang, MBA/MSM-Finance ’12 won first place. They received an invitation to the Cleveland ACG Deal Maker Awards, a cash prize, and an all-expenses-paid trip to San Diego for InterGrowth, the national ACG conference to be held in May. Weatherhead team Zhuowen Chen, MSM-Finance ’12; Mayur Jethva MBA/MSM-Finance ’12; Wei-An Lin, MBA/MSM-Finance ’12; Mo Shen, MSM-Finance ’12; and Yuting Yan, MBA/MSM-Finance ’11 won second place, and received an invitation to the Deal Maker Awards and a cash prize.

Scott A. Fine, Professor of Banking and Finance and the team’s faculty coach, says, “It was a great pleasure to work with these students. All three teams did an outstanding job and represented themselves and the school ably and proudly.”

MEXICAN BUSINESS MAGAZINE TOUTS WEATHERHEAD MBA

Weatherhead’s MBA program placed 32nd in the U.S. and 55th globally in a recent ranking of “The Best Global MBAs for Mexicans” by Expansión, Mexico’s premier business magazine. This year’s ranking marks an improvement from 2010, when Weatherhead placed 56th globally.
WEATHERHEAD STUDENTS OBTAIN PRESTIGIOUS CLIMATE CORPS INTERNSHIPS FOR SECOND CONSECUTIVE YEAR

The Environmental Defense Fund (EDF), which runs the Climate Corps program, selected MBA candidates Shunsuke Numata, MBA ’12, and Amogh Garg, MBA ‘12, from among hundreds of applicants from leading U.S. business schools for summer 2011 internships. According to the EDF, the program “trains top-tier business students and embeds them in corporations to identify energy savings and develop practical, actionable plans for companies” with results that have a noticeable impact on the bottom line. Numata worked at Hospital Corporation of America, while Garg’s internship was at Ingersoll Rand.

STUDY BY SCOTT SHANE MAKES MEDIA SPLASH

On February 14, 2011, The Wall Street Journal published analysis by Scott A. Shane, PhD, A. Malachi Mixon III Professor of Entrepreneurial Studies and Chair and Professor of Economics, of research he conducted with Mark Schweitzer, senior vice president and director of research at the Cleveland Fed, showing that entrepreneurs’ dependence on home equity loans contributed to the small business credit crunch. The study was also covered by Inc. on December 23, 2010, in an article entitled “Falling House Prices Hurt Small Businesses.”

Dr. Shane’s summary commentary on the study’s conclusions, published on the Cleveland Fed’s website on March 24, 2011, was covered in Columbus Business First in the article “Rising Entrepreneurship is Great Recession Myth, Fed Researcher Says.” The New York Times’ Economix blog picked it up for a post entitled “A Decline in American Entrepreneurship,” as did the Times’ You’re the Boss blog under the headline “Tracing a Decline in New Businesses.” It was further analyzed by The Huffington Post on April 5, 2011, in the article “What Happened to Entrepreneurship During the Recession?” and by Dow Jones’ Tell It to Al blog in “Great Recession Didn’t Create New Entrepreneurs.” It received mention in SmartCompany’s article “A Myth Busted?” and an article entitled “U.S. Lost 1 Million Self-Employed Firms” in the Orange County Register.

A prolific writer, Shane has been a regular columnist for Businessweek, Small Business Trends, and The American (the journal of the American Enterprise Institute). Recent opinion columns have focused on the Patient Protection and Affordable Care Act, the small business credit crunch and its relationship to the housing bubble, and economic recovery prospects for small businesses. Now, Shane has started a new blog for Forbes.com called Smart Charts. In each post, Shane will discuss and interpret an infographic related to small business. Read more about Shane’s current activities in Weatherhead by Department on page 39.
Economics faculty Jack Kleinhenz, PhD, Adjunct Professor of Economics, and Susan Helper, PhD, Frank Tracy Carlton Professor of Economics, have founded a new student chapter of the National Association of Business Economics (NABE) at Weatherhead. There are only eight such chapters in the U.S.

With the help of Gary Murphy, PhD, Assistant Professor of Economics and Faculty Director of the Undergraduate Economics Program, and founding student members Yue Qi, Di Tang, and Alexander Warofka, Dr. Kleinhenz and Dr. Helper started the organization to broaden undergraduate learning opportunities in economics, create connections between Weatherhead students and the business community, and inspire students to investigate careers in economics.

The Weatherhead chapter of NABE plans to offer a number of activities to enrich the undergraduate experience. These may include guest lectures by economists like current NABE president Rich Wobbekind, panel discussions featuring area professionals, and visits from alumni. Students may even get the chance to attend NABE policy meetings in Washington, DC, where executive branch officials, federal legislators, noted economists, and Federal Reserve officials and staff participate and address the attendees.

NABE is the premier professional association for business economists who use economics in the workplace and implement research findings in real-life business situations. Business economists are often on the staff of large companies or organizations, charged with forecasting the economic outlook for their industry, investigating changes in the economy, and explaining how changes will impact their company. Kleinhenz hopes to introduce NABE members at Weatherhead to these career possibilities.

“We’re in the formative planning stages, but we hope to have internship opportunities available through the chapter, perhaps as early as spring 2012. I have had Weatherhead students intern in my consulting practice, and they are talented and capable. Internships would create value for them and for Cleveland companies,” says Kleinhenz.

March 2011 saw MBA student teams compete in no fewer than four case competitions based around questions of sustainability or design—fitting challenges to students of Weatherhead’s signature themes, Manage by Designing and Sustainable Enterprise. The Aspen Institute Case Competition invited teams from 25 business schools to innovate at the intersection of corporate profits and environmental, social, and ethical issues. Net Impact teamed with xpedx to offer students a chance to create a sustainability scorecard for xpedx’s suppliers. The Hult Global Case Challenge, in partnership with Clinton Global Initiative, focused students’ efforts on a mounting environmental and social crisis: water access in developing countries. Meanwhile, Rotman School of Management, IDEO, and Mayo Clinic Center invited students from North America’s most prominent business and design schools to the Rotman Business Design Challenge, where teams solved a “wicked problem” using design methodologies and business acumen.
WEATHERHEAD TEAM AMONG TOP 10 IN PEARSON’S PROJECT (RED)™ CHALLENGE

Weatherhead undergraduates were among the front-runners in a fall 2010 marketing competition sponsored by academic publisher Pearson together with (RED)™, a brand that teams with companies to divert a share of profits from special (PRODUCT)RED items to the UN Global Fund to fight HIV/AIDS in Africa. Pearson, (RED)™, and the authors of Pearson’s Marketing: Real People, Real Choices, Michael R. Solomon, Greg W. Marshall, and Elnora W. Stuart, challenged marketing students around the country to develop the next (PRODUCT)RED concept aimed at college students. Each team produced a short video explaining and promoting their product. The Case Western Reserve team, consisting of management majors Jessica Borth, BS ’12, and Hillary Conidi, BS ’12, and marketing major Shuang Chen, BA ’11, submitted a proposal that was among the top 10 chosen by popular vote. They came up with an idea for an independent film festival, PREMIERED(RED), that would tour college campuses with proceeds going to the UN Global Fund.

CHALLENGE INSPIRES ALUMNI COUNCIL TO RAISE MORE THAN $21,000

In an effort to remind Weatherhead alumni that their philanthropic participation helps improve their alma mater’s ranking in U.S. News & World Report, the Alumni Advisory Council challenged themselves to increase their own participation in the Annual Fund during 2010. As a further incentive, one member agreed to match members’ gifts, dollar for dollar, if they achieved their goal. The challenge was a tremendous success, with the 35-member Council raising over $21,000 for Weatherhead’s students, faculty, and programs, and increasing their participation to 94%.

WEATHERHEAD STUDENTS PLACE 1ST IN CHARTERED FINANCIAL ANALYST GLOBAL INVESTMENT RESEARCH CHALLENGE

The Cleveland chapter of the CFA Institute sponsored a case competition that asked teams to perform in-depth fundamental equity research on J.M. Smucker’s, the Orrville, Ohio-based food company whose brands include Folger’s, Jif, and Dunkin’ Donuts. Weatherhead’s winning team included Allison Hollister, MBA ’11; Arindam Jha, MBA ’11; Wen “Claire” Qin, MSM-Finance ’12; Vikram Tuscano, MBA ’11; and Yuting ”Grace” Yan, MBA/MSM-Finance ’11.

The students overcame teams from Ashland University, Cleveland State University, Hiram College, John Carroll University, Kent State University, and Walsh University to advance to the super-regional final in early April, where they competed against more than 35 teams from the U.S., Canada, and Mexico. This is the second consecutive year Weatherhead has made it to the super-regional final.

Coaching and supporting this year’s team were Scott A. Fine, Professor of Banking and Finance; Deborah Bibb, senior director of admissions; and Warren Coleman, MBA ’03.
“I had no idea what I was doing,” says John Paul Stephens, PhD, Assistant Professor of Organizational Behavior, with a laugh. He is at once referring to joining the University Musical Society (UMS) Choral Union in Ann Arbor, Michigan, and to studying the UMS Choral Union as part of his doctoral work in organizational psychology.
During Stephens’ very first term with the choir, they performed Beethoven’s Ninth Symphony and Ralph Vaughan Williams’ “very technically crazy” choral work, A Sea Symphony. These were demanding pieces, and the choir, which had just participated in a multiple Grammy-award-winning recording, is amateur only in the sense that no one gets paid. Joining the choir is not an extracurricular activity for the faint of heart!

Stephens sang with the UMS Choral Union for two years before he decided to dig deeper and actually study the group as a central component of his doctoral research. The choir’s members were both excited to take part in the study, and “a little nervous that I would be taking notes on their singing,” says Stephens with a smile. Jerry Blackstone, DMA, the choir’s conductor and chair of the Conducting Department at the University of Michigan, ended up on the committee that evaluated Stephens’ dissertation.

“In part, it was my experience as a novice that motivated me to study the choir,” Stephens says. “Ideally, a member of the choir both sight-reads his or her vocal part and tunes in to others to shape his or her own sound. I was not the best sight-reader, so I had to really listen.”

Stephens calls this challenging endeavor coordination. Coordination denotes a kind of collective action that entails the harmonization (in this case, both literal and figurative) of individual contributions towards a common goal. It requires each group member to pay simultaneous attention to his or her own performance, to the performance of individual colleagues, and to the cumulative performance of the group. Music groups present an especially clear example of coordination, but Stephens says that it works its way into all facets of our lives.
The interplay of self-awareness and other-awareness as a cognitive experience has attracted the interest of many psychologists. Karl E. Weick, a noted OB scholar, called the phenomenon “heedful interrelating.” In conducting interviews with choir members, Stephens was intrigued to recognize that many experienced heedful interrelating as a sensation of oneness with others. This was a sensation that, again and again, Stephens heard described as “beautiful.”

“Even when we drive, we adjust our foot on the pedal and our hands on the wheel constantly, depending on who is in front of us, behind us, and to the side. It’s a very direct response to our environment.”
“People were very articulate about what was beautiful, and that was a sense of enacting a whole,” he says. “Choir members would tell me, ‘We all came together as one voice,’ or ‘We were able to communicate the whole of the story that this piece of music is telling.’ On the other hand, when individuals in the group were not coordinating well, the results were not deemed as beautiful.”

Beauty, by the way, is not just the icing on the aesthetic cake of the UMS Choral Union experience. Indeed, Stephens finds that beauty is fundamental to the experience, and to the cohesion of the choir.

“When you associate beauty with the feeling of wholeness, it’s motivating. It’s a sensation that doesn’t always happen. It keeps you coming back, hoping, even yearning for it to happen again,” says Stephens. “After all, we were not getting paid, and it can be tough to rehearse for three hours night after night, or to drive to Detroit to perform four nights in a row.”

The volunteer singers show up faithfully because they are hooked on an aesthetic experience, a kind of beauty that they cannot access except through collective action; as Stephens says, “When self, other, and the task are successfully brought together in coordination, we perceive beauty.”

Stephens based his dissertation in part on an ethnographic study of the UMS Choral Union. He took two years’ worth of field notes. He conducted interviews with participants and analyzed his data to discern patterns. An anthropological method that describes cultures or groups, ethnography is an unusual technique in OB and psychology, although Stephens says that organizational ethnographies like his are becoming more widespread.

“What’s useful is that the very rich stories you get [through conducting an ethnographic study] kind of prime the pump. You try to generalize based upon your study. Then others may test your observations. Does this work in this other choir? This hospital? This aircraft carrier?” Stephens explains.

After completing his analysis of the data he gathered, Stephens presented his research to the choir to make sure that his conclusions were true to their experience. Ethnographers call this step “member checking.” Stephens’ presentation was “well received, and seemed to resonate with [choir members],” he says. But were they curious to read his PhD dissertation (entitled Towards a Psychology of Coordination: Exploring Feeling and Focus in the Individual and Group in Music-Making) in full?

“I advised against it,” Stephens says with a laugh.
In addition to articles based upon his doctoral research, Stephens is currently working on a paper prompted by Convergence: Managing + Designing, a conference held at Weatherhead in June, 2010. In the paper, he argues that management and design converge in the field of aesthetics. Aesthetics is a branch of philosophy not usually associated with management science, although according to Stephens, interest in the intersection of the two fields is growing. He argues that the connection is there.

“Aesthetics—specifically, the appreciation of beauty—is a part of positive psychology,” explains Stephens. “Positive psychology examines what it is that humans excel at. Our appreciation of beauty is one of our ‘character strengths.’ Another is our ability to organize.”

Stephens continues, “Bees and ants have organization, of course, but not the variety of different organizations we can create. Our ability to develop sophisticated organizations is an advantage because together, we humans can handle massive tasks.”

A choir, of course, is one example of a sophisticated organization, Stephens says. But there are myriad others.

“Think of any large company. How are all these people brought together to accomplish something? Especially now, when employees are often geographically widely distributed and so much work is done virtually?”

Studying collective action in a knowledge-based organization like an accounting firm, a consulting business, or even a management school, is difficult, because the activities involved in running the organization are abstract, intangible. So are the organization’s objectives. For Stephens’ purposes, therefore, part of the appeal of the UMS Choral Union was the sheer obviousness of the activity in which the group was engaged. Stephens is now excited to apply his findings to other complex collective enterprises.

“I try [in my work] to flesh out the fact that implicitly, the self/other dynamic is there in cross-functional teams, product design teams, and so on,” he says.
As part of his doctoral work, Stephens also conducted a lab study in which he made video recordings of small groups composing songs in order to study the embodiment of the cognitive and aesthetic aspects of coordination. Of course, he already had an excellent example of the embodiment of coordination in the group leadership demonstrated by Dr. Blackstone, conductor of the UMS Choral Union.

Stephens cited Dr. Blackstone’s expertise in communicating with the choir via facial expressions, speech, artifacts, and writing as a particularly valuable leadership skill. “He used broad media to reach as many people as possible. He also modeled action: he would sing how he wanted us to sing, then imitate us and make fun of us to get us to laugh.” Blackstone would use mimicry and would convey emotions through speech, gesture, and expression to show the choir what he was seeing and hearing from them. His method of mirroring the singers also, in a sense, allowed him to become them.

Stephens explains, “The conductor is the embodiment of the whole. Dr. Blackstone, in this instance, is not just a manager, but a reflection of what the choir is doing. It’s fascinating how leaders and managers are able to embody the whole through actions and symbols.” He gives the example of a CEO’s visit to the shop floor, a symbolic action that communicates solidarity with employees. “That CEO is the face of the company, literally. Seeing and hearing that person makes a difference to employees,” he says.

Stephens’ current research projects include a related study with Curtis LeBaron, PhD, at Brigham Young University. Together, they are analyzing video evidence of leadership in various fields. Subjects include an attending surgeon interacting with less experienced doctors and an architect consulting with a group of clients. “Leader isn’t really the best word for people in these positions,” says Stephens. “I like the word co-performer to describe the individual who’s the most invested in guiding the group.” Meanwhile, a co-performer himself in the classroom, Stephens affirms that coordination is essential to teaching and learning.

“You have to constantly ask yourself, Am I getting what the students are saying? Are they getting me? What about communicating with each other? You must make sure that you’re talking with each other—that your classroom is not just a collection of individual voices.”

Stephens has even gotten his students to sing together as a team-building exercise. Small groups are assigned notes: do, re, me, fa, and so on, and have to coordinate to eke out tunes like “Happy Birthday.” “When it doesn’t go well, we talk about why it is so difficult to pay attention to others’ notes,” says Stephens. “When it does go well, it’s a lot of fun, and there’s a lot of laughter.”
A SCANDINAVIAN DESIGN EXPERIENCE BEYOND IKEA:

Akhila Skifteness and Tim Anderson Attend a Danish Design Camp
Sustainable transportation faces certain obstacles. Not just potholes and traffic jams, but cultural obstacles. And they vary less across borders, even oceans, than you might think. Akhila Skiftenes, MBA ’11, and Timothy Anderson, MBA ’11, learned as much when they were invited to take part in new ways of transportation, an event at the Kolding School of Design (DK:) in Kolding, Denmark, to which students from around the globe flocked November 1-12 last year.
How, then, should sustainable transportation advocates entice the public to use mass transit or to buy cars that emit no gas-powered roar? How do cities alleviate pollution and traffic without resorting to measures like the system Beijing used during the 2008 Olympics, when cars with odd-numbered license plates and those with even numbers were assigned alternate days on the road? (How would Europeans, never mind Americans, react to such restrictions?)

etrans aims to popularize electric cars in Denmark by stimulating consumer interest and the development of a sector to service the cars. While they are at it, DK: and collaborators plan to change the way Danish people view transportation across the board. New Ways of Transportation is one crowd-sourcing method by which DK: is gathering ways to sell the public on getting around in greener fashion.

“These etrans design camps are a relatively inexpensive way for DK: to get a global perspective,” says Skiftenes. The first camp was convened in China in 2009, and in 2010, 38 students came to Kolding from China, New Zealand, India, Syria, Europe, and the U.S. Their backgrounds included graphic, fashion, textile, industrial, and interactive design. But what this diverse group had in common was that all of them were current design students—except for Skiftenes and Anderson, the lone MBAs.

“We were so out of our element, it hurt!” Skiftenes remembers. “But we were open to being in that environment, because Fred [Collopy, PhD, Senior Associate Dean and Professor of Information Systems] and Dick [Buchanan, PhD, Professor of Information Systems] had us out of our comfort zone already. The Design in Management: Concepts and Practices course that they co-teach was preparation for this.”
“My take on it is that the designers out there were doing the complete opposite of what we do at Weatherhead,” Anderson adds. “We use design techniques in management. They wanted to bring business sense into things related to design.”

Participants were divided up into teams of three that would work together on a sustainable transportation project for the duration of the camp. Skiftenes found the experience of working exclusively with design students invigorating. “A lot of times, in MBA classes, it’s easy to fall back into the business framework because you are surrounded by like-minded people,” she reflects. “It was a good experience to be immersed in the design mentality.”

“Out of the frying pan, into the fire, I’d say!” Anderson replies with a laugh.

Indeed, the students’ first exercise was an unusual team-building task: cooking a potluck dinner.

Says Skiftenes, “They had us design ‘tablescapes,’ too”—decorative place settings that added enhanced sensory interest to the dinner table.

“Honestly, these designers! I was cutting up vegetables, and they were all looking around for stuff to make our tablescape,” Anderson remembers with a smile.

The following day, the teams received their brief: devise fresh, design-driven ways to reduce transportation-related CO2 emissions. A tall order—but the student groups could tackle it in any way they chose.

“They didn’t constrain us at all, just told us go with it! We could make a system more functional or more fun, in whatever direction we wanted to go,” says Skiftenes.

THE BRIEF INCLUDED A PRESENTATION BY CORDY SWOPE, DESIGN DIRECTOR OF CONSULTING FIRM IDEO AND A CAMP FACILITATOR, IN WHICH HE DISCUSSED FOUR PRINCIPLES THAT INSPIRE HIS COMPANY’S DESIGN CONCEPTS:

1: SPEAK JOY, NOT FEAR: DESIGN PRODUCTS AND SERVICES SHOULD CREATE NOT FEAR, BUT JOY.

2: USE JUDO: TAKE YOUR POINT OF DEPARTURE IN PEOPLE’S CURRENT BEHAVIOR, AND MODIFY IT. REDIRECT HUMAN BEHAVIOR JUST AS YOU WOULD REDIRECT AN ATTACK IN JUDO.

3: CREATE THE CROWD: CREATE A SENSE OF UNITY AND COMMUNITY.

4: GAME THE MUNDANE: PEP UP THE PLAIN; MAKE IT INTERESTING AND CREATE “AHA” EXPERIENCES.

(The four principles can be accessed on the DK: website at www.designskolenkolding.dk/index.php?id=3278)
Interestingly, 9 of 12 teams proposed improvements to public transportation rather than centering their efforts around personal vehicles. There seemed to be an unspoken consensus that ample opportunity existed to “pep up” the experience of riding buses and trains, as Swope’s fourth design principle suggested.

“My Danish colleague talked to a handful of people who didn’t like taking the bus,” says Anderson. “They said, ‘I have a kid, I have a guitar case, I have groceries....’” These passengers complained of difficulties boarding and navigating the bus with a child or a bulky item in tow.

Anderson and his teammates zeroed in on helping burdened shoppers access buses more easily. “We experimented with designs for a seamless process, where they go into a store and fill up a basket that can connect physically to the bus. It could plug in under their seat. They could take it home, empty it, and return it to the store—or own one.” The team constructed a special basket that earned praise from Swope for “hardcore, old-school, annoyance-driven design that makes a problem go away.” Anderson’s team called their invention the “BusKit.”

Skiftenes’ group got bus passes and rode around the city, watching how commuters used the vehicles. “One thing we observed is that standing on the bus feels insecure, but of course, you don’t have a guaranteed seat. So my team sought to make it more appealing to stand on the bus, without increasing congestion on board.” They came up with a vertical device that enables passengers to stand more comfortably and safely, and called their product “Lean on Me.” Swope noted that Skiftenes and her colleagues did well to build a product around their observations of human behavior and approvingly declared that her team “did their homework.”

Skiftenes and Anderson agree that in evaluating the myriad complex ideas that such a broad assignment can elicit, “prototyping is key. You come up with an idea and prototype it immediately,” says Skiftenes.

“One big takeaway was, if I’m telling you a simple idea, it’s easy to understand. For example, this laptop is black. If I say I want to make a blue laptop, okay, that’s easy to grasp. But if someone tells you something really abstract, between what you’re saying and what I’m hearing, it’s easy to poke holes in the idea without really understanding what it is. But when you show it to somebody—‘Here, I’ll take cardboard and tape and build you what I mean’—then others’ criticism is more relevant,” says Anderson.

Dr. Collopy states as much in a recent article for the German management journal *Revue für postheroisches Management*. He quotes Maya Lin, the architect of the Vietnam Veterans Memorial, in her book *Boundaries*: “I think with my hands.” Collopy goes on to say that at the heart of the design process—whether it be of a product, service, experience, or system—lie hands-on activities like sketching, modeling, and building. Experimentation with model after model of a concept, as Skiftenes and Anderson discovered, helps the designer channel his or her efforts into the best bet. Sometimes, a picture really is worth a thousand words.

Proof positive that words are not always the most effective means of communication, the foreman of the workshop where teams constructed their prototypes spoke no English, Anderson recalls. “But ‘Vrrrr! Vrrrr!’ for ‘Where’s the drill?’ worked just fine!”
Karen Braun, PhD, CPA, Associate Professor of Accountancy, and a colleague copresented “Integrating Sustainability in an Introductory Managerial Accounting Course” at the 2011 American Accounting Association Annual Meeting in Denver, August 6-10. In January 2012, a revised version of Dr. Braun’s popular textbook, Managerial Accounting, will be published that will include extensive information on environmental sustainability. Says Braun, “Each chapter has a small section, and corresponding homework problems, on how the chapter topic relates to sustainability. In addition, we added a whole short chapter on environmental sustainability: why it’s important, why businesses are working towards it, the newly emerging field of environmental management accounting (EMA), and some of the challenges in implementing EMA systems.”

Timothy J. Fogarty, PhD, CPA, Professor of Accountancy, and Larry M. Parker, PhD, CPA, Associate Professor of Accountancy, coauthored “Seeing What You Want to See: Perceptual Biases of Auditors.” Their paper was selected for the 2011 Distinguished Paper Award in Ethics by the North American Management Society Division of MBAA International.

Gregory Jonas, PhD, CMA, Assistant Professor of Accountancy, was inducted into the Stuart Cameron McLeod Society (SCMS) in recognition of his contribution at the regional and global level of the Institute of Management Accountants. The SCMS—also known as the Society for Continuing Member Service—honors and encourages continued outstanding service in the accounting profession.

Gary J. Previts, PhD, CPA, Distinguished University Professor, E. Mandell de Windt Professor in Leadership and Enterprise Development and Chair and Professor of Accountancy, was consulted by online magazine Software ThinkTank for an article on the history of double-entry accounting from the 13th century to the present day entitled “How a Bunch of Italian Merchants Led the Way to ERP.” The Journal of Accountancy also asked Dr. Previts about his leadership journey for an April 2011 article entitled “What Does It Take to Lead?”

Previts and collaborators Peter Walton, PhD, of the University of Sydney, and Peter Wolnizer, PhD, of Paris’ ESSEC Business School, recently published the first in a series of books detailing the international history of accounting and financial reporting. A Global History of Accounting, Financial Reporting and Public Policy: Europe, published by Emerald Group in 2010, covers around 30 countries. The second volume in the series will follow swiftly; it will focus on the Americas. Dr. Wolnizer, the recently retired Dean of the Sydney Business School, will be visiting the Accountancy Department in fall 2011. Among Wolnizer’s recent honors was a Medal of the Order of Australia in the General Division issued in the 2011 Queen’s Birthday Honours list for service to higher education in the field of business and economics as an academic and administrator.

Previts also gave the opening plenary address on April 8, 2011, to the 63rd Annual Meeting of the Southeast Region of the American Accounting Association, in Florida. His theme was “Why Accounting Must Change!” A past president of the American Accounting Association (2007-8), Previts is currently involved as a member of the Sponsoring Committee for the Pathways Commission, a private-sector group studying ways to improve higher education in the field.
Previts was invited by the Comptroller General of the United States to an October 20, 2011 forum on improving financial literacy in the U.S. held at the Government Accountability Office headquarters in Washington, DC.

**BANKING AND FINANCE**

Christa Bouwman, PhD, Associate Professor of Banking and Finance presented two papers: “Director Overlap and Firm Financial Policies” at the American Finance Association Meeting held January 7-9, 2011 in Denver, and “The Geography of Executive Compensation” at the University of Vienna in Austria on July 20, 2011. A third paper, “Corporate Governance Propagation through Overlapping Directors,” was accepted for publication in the Review of Financial Studies. Dr. Bouwman also wrote a book chapter on “Overlapping Boards of Directors: Causes and Consequences for Corporate Governance,” which appeared in Financial Contagion: The Viral Threat to the Wealth of Nations (2011).

Bouwman also coauthored the paper “Bank Liquidity Creation and Risk Taking During Distress.” Bouwman was on the program committees for the annual meetings of the Western Finance Association (held in Santa Fe, New Mexico, June 19-22, 2011) and the Financial Intermediation Research Society (held in Sydney, Australia, June 6-8, 2011). At the latter conference, Dr. Bouwman presented “How Does Capital Affect Bank Performance During Financial Crises?” She also chaired a session on “Regulations and Banking” and discussed a paper on “Debt Ownership in Chapter 11 Restructurings.”

Scott A. Fine, Professor of Banking and Finance, weighed in on the issue of airline executive compensation in the Plain Dealer on March 5, 2011. He spoke to the controversy surrounding the aptly-named “golden parachutes” that have become standard for CEOs who steer airlines through mergers.

William Mahnic, Associate Professor of Banking and Finance, appeared on the television program “Good Company” on WKYC-TV, a Cleveland NBC affiliate, on February 21, 2011. In the interview, Mahnic provided perspective on the recent surge in food and energy prices. WKYC again consulted Mahnic on February 25 for best practices to avoid credit report woes when cancelling credit cards. He was also interviewed for a news segment that ran on Cleveland ABC affiliate WEWS-TV on February 23-24, 2011, exploring the impact that rising oil prices will have on the U.S. rate of economic growth in 2011. On August 9, 2011, Mahnic took part in WKYC’s “@ the Table” discussion of the volatility of the stock market after the U.S. credit rating downgrade.

J.B. Silvers, PhD, John R. Mannix Medical Mutual of Ohio Professor in Health Care Finance and Professor of Banking and Finance, spoke to the Plain Dealer on January 27, 2011, regarding the local business support that exists for a new medical mart complex under construction in downtown Cleveland; 30 of 57 prospective tenants for the complex are companies located in Northeast Ohio. On April 5, 2011, Dr. Silvers weighed in on Marketplace Morning Report on a budget bill proposed by Representative Paul Ryan of Wisconsin. He also provided commentary to the Plain Dealer on multiple occasions in June 2011 on plans to shutter East Cleveland’s Huron Hospital.

Silvers presented “Healthcare Reform: Policy and Management Decisions” at a National Society of Hispanic MBAs (NSHMB) event: 2011’s Hispanic Summit: Improving Healthcare in Our Community, held May 19-20 at the Cleveland Clinic. In June 2011, he was named to the board that oversees Cuyahoga County’s MetroHealth System by county executive Ed FitzGerald.
Robin A. Dubin, PhD, Professor of Economics, was a guest on Cleveland NPR affiliate WCPN’s The Sound of Ideas on January 13, 2011; she was part of a panel invited to discuss the pros and cons of developing retail establishments on the former grounds of the Oakwood Country Club in the Cleveland metro area.

On September 12, 2011, the Plain Dealer interviewed Dr. Dubin about the surprisingly robust sales currently enjoyed by Northeast Ohio automotive dealers. Dubin suggested that the hot market for the Chevy Cruze (made in Lordstown, OH) may have contributed to the sales figures.

On March 21-22, 2011, MSNBC and WEWS, Cleveland’s ABC affiliate, sought the opinion of Susan Helper, PhD, Frank Tracy Carlton Professor of Economics, about the impact that the 2011 earthquake and tsunami in Japan will have on the U.S. automotive industry. Many automotive parts are manufactured in Japan, where these natural disasters halted plant operations and shipping—disruptions that will result in shortages in the U.S.

In an article on group performance published March 18, 2011, New York Times columnist David Brooks cited findings by Dr. Helper and research partners Morris Kleiner and Yingchun Wang. Helper and coauthors found that manufacturing companies that reward teams rather than individuals for performance inspire greater motivation among workers. Virginia Heffernan, a columnist for the Times’ Opinionator, spoke with Helper about the hidden costs of coupons to the economy and the environment on May 1, 2011.

Helper also spoke at a manufacturing summit held May 6, 2011, at the Federal Reserve Bank of Cleveland. She spoke to the viability of many Northeast Ohio manufacturing companies, depending on their ability to find new opportunities and, significantly, to reach out to other businesses within or outside of their sector. Helper’s research has showed that by engaging other companies in dialogue about the obstacles that face them, manufacturing companies actually increase their productivity by 10%.

In response to a wave of media stories on a possible “manufacturing renaissance” in so-called “Rust Belt” states like Michigan, Ohio, and Pennsylvania, Helper spoke with outlets like Crain’s Cleveland Business and Delaware Online, and was a guest on May 24, 2011 on Boston NPR affiliate WBUR’s news and commentary program On Point.

Automotive News highlighted Helper’s new, comprehensive study of the U.S. automotive supply chain in the aftermath of the industry crisis, on February 18, 2011. The study analyzes results from a nationwide survey of companies of all sizes that serve the automotive industry. Helper moderated a panel on the outlook for automotive manufacturing and technology jobs at Driving Change: Greening the Automotive Workforce, a conference held in Dearborn, Michigan, on May 3-4, 2011. For more on Helper’s research into the changes affecting the automotive industry, turn to page 48-49.

Jack Kleinhenz, PhD, Adjunct Professor of Economics, was recently named Chair of the National Association for Business Economics (NABE) Education Committee, which under his leadership is working on a proposal for a certificate program in business.
Dr. Kleinhenz presented papers at the Bank of America Merrill Lynch Consumer Conference and the Telsey Conference on Retail Sector in New York City. In addition, he published the article “Regional Competitiveness: Labor Management Relations, Workplace Practices” in the April 2011 issue of Business Economics magazine.

Scott A. Shane, PhD, A. Malachi Mixon III Professor of Entrepreneurial Studies, Chair and Professor of Economics, who recently appeared on SmallBizTrends' 2011 list of the top 100 Small Business Influencers, appeared in the documentary SHINE: The Entrepreneur’s Journey, created by Dan McComb and Ben Medina and produced by Biznik, a networking site for entrepreneurs and small businesspeople. The film can be viewed for free at biznik.com/shine. Dr. Shane also provided expert commentary for Wanted: Leaders, a documentary television series on global leadership that ran on Teleac, a Dutch public broadcasting station, in 2010.

Shane was heard on WCPN’s The Sound of Ideas on January 24, 2011, when the program covered the spread of entrepreneurship in Northeast Ohio, particularly in the healthcare and technology fields. He also spoke on Columbus’ NPR affiliate, WOSU, on January 31, 2011 about how government regulations affect business expansion.

In a March 22, 2011 article in the American, Shane explored federal contracting policies towards small businesses, pointing out that although funds channeled to small businesses for federal contracts have increased over the last half-dozen years, businesses of this size have actually lost market share overall. Recent mentions of Shane's work have appeared in print and online outlets such as The Washington Post, Psychology Today, the Toronto Star and the Medicine Show blog on Forbes.com, and Black Enterprise recently named Shane's book The Illusions of Entrepreneurship to its list of “5 Books Every Entrepreneur Should Read.” Shane also contributed an opinion column to The Wall Street Journal on June 13, 2011, entitled “To Create More Jobs, Go Where the Jobs Are.”

The October 2010 issue of Virtual Mentor, the online ethics journal of the American Medical Association, was devoted to the topic of “Ethical Challenges in Modern Cardiovascular Medicine.” The issue included a submission from Mark Votruba, PhD, Associate Professor of Economics and director of the Health Economics Unit in the Center for Health Care Research & Policy at MetroHealth Medical Center. Dr. Votruba was also a guest on WCPN’s The Sound of Ideas on April 14, 2011, where he discussed politics and the national debt following President Barack Obama’s speech to the nation calling for a balanced approach to reducing the nation’s massive debt.

“Search frictions arise whenever consumers are unable to easily compare the products available. If consumers have a hard time evaluating value, competition becomes less about value, and more about marketing,” says Votruba. Such a breakdown of the rules that usually govern the marketplace is known to economists as a “search friction.”
InFORMATIOn SySTEMS

At the 2011 Academy of Management (AoM) meeting August 12-16, 2011, Richard J. Boland Jr., PhD, Elizabeth M. and William C. Treuhaft Professor of Management and Chair and Professor of Information Systems, discussed “Industrial Pricing Orientation: The Organizational Transformation towards Value-Based Pricing.”

Richard Buchanan, PhD, Professor of Information Systems, presented at Interaction Eleven, the premier conference for interaction designers, which met in Boulder, Colorado, February 9-12, 2011.

Each week, the Financial Times chooses a business luminary to define five key terms from his or her field. Fred Collopy, PhD, Senior Associate Dean and Professor of Information Systems, was named the Financial Times’ Professor of the Week on February 3, 2011. Dr. Collopy defined the terms “default solution,” “design attitude,” “design thinking,” “systems thinking,” and “wicked problem.”

A January-February 2011 Inside Business magazine article discussed increasing enrollment in MBA programs that, like Weatherhead’s, approach business studies from a holistic standpoint. The magazine quoted Collopy as a source, and also spoke with alumna Mackenzie King, MBA ’11. He was also cited in an article in The Christian Science Monitor on March 23, 2011 that explored the integration of art and design into contemporary management culture and questioned the marginalization of the arts in the U.S. educational system.

Kalle J. Lyytinen, PhD, Iris S. Wolstein Professor in Management Design, Professor of Information Systems and Faculty Director of the Doctor of Management Program (DM), also attended the 2011 AoM meeting, participating in a panel on “Funding Opportunities for AoM Scholars from the National Science Foundation” and a panel on “The Co-production of Social Contagion: A Comparative Analysis of Two Social Networking Sites” with DM student author Mike Fischer, Dr. Boland, and others. Dr. Lyytinen also participated in a panel on the “Evolution of Digitally-enabled Design Processes: The Case of a Large Design and Construction Firm,” chaired a session on “Decoding the DNA in Social Sciences: A Sequence Analysis Method for Analyzing Complex Process Data,” and spoke on “The DNA of Design: Using Sequence Analysis to Analyze Design Processes.” Lyytinen cochaired the opening ceremony of the plenary session at the 10th International Conference on Mobile Business, June 20, 2011, in Como, Italy. He copresented on “The Paradoxes of Change and Control in Digital Infrastructures: The Mobile Operating Systems Case” and “Mobile Payments: Towards Another Clash of the Titans?” He also organized the June 8, 2011, CIO Symposium for the European Conference on Information Systems (ECIS) in Helsinki, Finland. On May 18, 2011, Lyytinen gave an invited talk at MIT Research School in Eskilstuna, Sweden, entitled “How to Publish High-Impact Business Research.” Most recently, Lyytinen participated as an international reviewer for the ProcessIT Innovations project supported by the VINNOVA foundation in Umeå, Sweden.
Sayan Chatterjee, PhD, Professor of Marketing and Policy Studies, has presented his paper “Business Model Design: Towards a Taxonomy and Heuristics” at numerous conferences over the past year, beginning with the 2010 Strategic Management Society Meeting in Rome, Italy. Dr. Chatterjee was invited to give the lecture at the University of St. Gallen, Switzerland; at IE Business School in Madrid; and (as the Böhm-Bawerk Lecture) at the University of Innsbruck, Austria. He also delivered it as the keynote speech on business model innovation at the IMP Conference at Innsbruck in 2010, and will present it at the Strategic Management Society Meeting in Miami, Florida, in November 2011. Chatterjee also presented “Crowdsourcing: Democratizing Strategy” at the June 2011 European Academy of Management conference in Tallinn, Estonia.

Jagdip Singh, PhD, H. Clark Ford Professor and Chair and Professor of Marketing and Policy Studies, presented “Theorizing Capabilities of Organizational Agility: A Paradox Framework” with Dr. Lyytinen at the 2011 AoM meeting. He also presented “Paradoxical Tensions of Hybrid Business Models: A Framework and Case Study” and “Profit Meets Social: A Framework for Hybrid Business Models” with colleagues.

Dr. Singh presented a paper on “Crafting Manuscripts for a Career in Marketing” at the American Marketing Association/Sheth Foundation Doctoral Consortium, and copresented “Managerial Innovativeness and Project Effectiveness in Nonprofit Organizations: A Test of Trust-Control Framework” at the International Conference on Engaged Management Scholarship at Weatherhead, both in June. The latter was awarded the Best Paper award for the conference.


In September 2011, Singh also presented a keynote address at the Brazilian Management Society meeting.

Paul F. Gerhart, PhD, Professor of Marketing and Policy Studies, an expert on labor and human resource policy, spoke with the Plain Dealer on March 5, 2011 about Senate Bill 5, the proposed bill to limit collective bargaining rights in Ohio. Dr. Gerhart, an experienced arbitrator in labor disputes, spoke to the bill’s potential effects on the education and public sectors in particular, and to the likelihood of legal challenges to the bill should it become law.

The Plain Dealer interviewed Rakesh Niraj, PhD, Assistant Professor of Marketing and Policy Studies, on December 28, 2010 to find out how, why, and under what circumstances free samples stimulate increased buying. Dr. Niraj told the newspaper that research has shown that consuming a free sample of food or drink causes people to buy more freely, but not necessarily to buy what they sampled.
**OPERATIONS**

Ankur Goel, PhD, Assistant Professor of Operations, spoke with *Industry Market Trends* on February 1, 2011, about the outlook for commodity prices in 2011. Dr. Goel brought up the volatility of prices in commodities like industrial metals, energy derivatives, and agricultural products, and suggested that buyers consider combating cost uncertainty with strategies like signing long-term contracts, hedging risk in the case of short- and medium-term contracts, and paying close attention to demand.

**ORGANIZATIONAL BEHAVIOR**

Diane Bergeron, PhD, Assistant Professor of Organizational Behavior, organized an AoM session at the 2011 meeting on “The Productivity Process: Research Tips and Strategies from Prolific Junior Faculty.” She also presented on “Proactive Personality as a Blessing or a Curse? Relationships to Work Activities and Career Outcomes.”

Diana Bilimoria, PhD, Professor of Organizational Behavior, was on a panel discussion at the 2011 AoM meeting of “Current and Future Inclusion Efforts in the Academy of Management,” and she also facilitated a “New Doctoral Students Consortium.” She chaired a session on “Individual and Organizational Strategies to Increase Women’s Participation in the STEM Workforce,” and spoke on “The Outcomes of Institutional Transformation Efforts to Advance Gender Equity.” Dr. Bilimoria also discussed “Promoting Diversity Among Faculty in Higher Education: Challenges, Insights, and New Collaborations.” She organized “Women on Boards of Higher Education Institutions” and also presented on “Seeing Leaders in Context: Implicit Leadership Theory Formation of Academic Department Chairs.”

Richard E. Boyatzis, PhD, Distinguished University Professor, H.R. Horvitz Professor in Family Business, and Professor of Organizational Behavior, chaired a session on “The Power of Vision in Team and Organization Development” at the 2011 AoM meeting. He also copresented on “Enlightening Modern Management with Ancient Wisdom: Eastern Mindfulness in Organization Science” with John Paul Stephens, PhD, Assistant Professor of Organizational Behavior.

Susan S. Case, PhD, Associate Professor of Organizational Behavior, delivered a paper on “Developing Integrity in Management Education by Bridging Religious Values;” in a panel on Emerging Issues in Management Education in the 21st Century Including Social Media Usage and Developing Integrity at the Business and Economics Society International Conference in St. Thomas, Virgin Islands, in January 2011.

At the 2011 AoM meeting, Dr. Case’s activities included presenting on “Educating Managers About Integrity: Sensitizing Learners to Universal Values and Cultural Variation;” facilitating and participating in a paper session on “Work-Family Conflict and its Influence on Work Outcomes and Personal Relationships,” and designing
a caucus session with two doctoral students on the question: “Is Eastern Wisdom Incompatible with Western Scientific Epistemology?” Of the more than 1300 research paper reviewers for the AoM Annual Meeting, Case received the Outstanding Reviewer award for the Organizational Behavior Division. Learn more about Case’s research on religious ethics and management science on pages 52-55.

Corinne A. Coen, PhD, Assistant Professor of Organizational Behavior, presented on “Operationalizing Team-Level Constructs: What Lies beyond Aggregations?” at the 2011 AoM meeting. The New Zealand Herald devoted a May 3, 2011 article, “Try Starting with the Positives for a Change, Academic Advises,” to a discussion of Appreciative Inquiry, the positive change technique developed at Weatherhead by David L. Cooperider, PhD, Fairmount Minerals Professor in Social Entrepreneurship and Professor of Organizational Behavior, and Ronald Fry, PhD, Chair and Professor of Organizational Behavior. Dr. Cooperider provided the newspaper with extensive commentary on the implementation and utility of the technique, including a number of success stories.

Cooperider was also a participant in a panel discussion featuring former U.S. Secretary of Energy Spencer Abraham at Sustainability 24, a conference hosted by Accenture on May 25, 2011. He spoke on the radical energy and productivity gains that can be generated when managers convene an Appreciative Inquiry Summit that involves players from throughout a system.

Dr. Fry participated in a workshop on “Positive, Dynamic, Talent-Based Organizational Change” and in a session on “Creating the Future of ODC” at the 2011 AoM meeting. He also presented, with Chris Laszlo, PhD, Associate Professor of Organizational Behavior, on “Embedding Sustainability Across the Great Divide: Holistic Business Strategies in a Fractured World.”

John Paul Stephens, PhD, Assistant Professor of Organizational Behavior, organized a session entitled “Learning to Coordinate: The Dynamic Interplay between Relationships and Structures” and presented “Learning to Coordinate as a Large Performative Group: The Roles of Leaders and Rehearsals” at the AoM meeting in 2011. He also presented on “Relationship Capacity as a Source of Resilience in Individuals and Teams in the Workplace” and gave the paper “Performing Beauty: Attention, Aesthetics and Action in the Coordination of a Community Choir.”

THE MANDEL CENTER FOR NONPROFIT ORGANIZATIONS

Richard E. Boyatzis, PhD, Distinguished University Professor, H. R. Horvitz Professor in Family Business, and Professor of Organizational Behavior, was appointed Interim Director of the Mandel Center. Dr. Boyatzis will be taking on a complete review of the Mandel Center and its programs with the help of an advisory group of faculty, staff, and outside experts in order to further our involvement and participation in nonprofit leadership and management.

THE FOWLER CENTER FOR SUSTAINABLE VALUE

The Fowler Center and CWRU’s Campus Sustainability Alliance sponsored a visit from Simon Fineman, chairman and CEO of Timbmet, a leading British wood products trader. In his February 17, 2011 presentation, “From Bull to Berries: A Trader Grows Greener,” Fineman related his journey from sustainability skeptic to environmental advocate, and discussed his new venture, LaHave Forests in Nova Scotia. LaHave Forests is intended to show how agroforestry can help to preserve woodlands for future generations.
DID YOU KNOW THAT YOU CAN CREATE A FINANCIAL MARKET IN A LAB? MUCH LIKE A GENIE IN A BOTTLE, THE EXPERIMENTAL SET-UP THAT YI-JING WU, PHD, ASSISTANT PROFESSOR OF ACCOUNTANCY, USES TO CONDUCT HER RESEARCH SHOWS THAT BIG IDEAS CAN FIT INTO SMALL PACKAGES.
SOX, as the act is commonly known, was a response to a rash of such accounting scandals. It was intended to restore investor confidence by imposing more rigorous accounting protocols on publicly-traded companies. This included mandating internal control audits (IC audits) to evaluate the accuracy of companies’ financial reporting. Under the new regulations, CEOs and CFOs are also personally required to vouch for their companies’ internal controls over financial reporting (ICFR) and are legally liable for the effectiveness of those controls.

Interestingly, the SEC found in a survey of financial executives that most did not believe that the required IC audits, above and beyond expanded managerial liability, contributed to investor confidence or enhanced stock prices. Yet investors disagreed: the SEC study found that they valued internal audit reports in making investment decisions.

Managers have limited resources, and improving internal controls is just one of the things they have to consider when allocating those resources,” says Wu, shedding light on the discrepancy between the managerial perception of IC audits and the investor perception of IC audits.

It became clear to Wu that investors were broadly right about SOX: IC audits did improve the accuracy of financial statements. The first year that SOX regulations were in place, sure enough, firms with ineffective ICFR frequently issued restatements (corrections of their previous financial statements). But to Wu, the more interesting question was how far the domino effect went: Was it the IC audit, increased manager liability, or a combination of both regulatory mechanisms that improved investor confidence in the reliability of financial statements? If IC audits lead to more accurate financial statements, then do more accurate financial statements lead to investor confidence, as reported by the SEC? Finally, does investor confidence drive up firm value—toppling the last domino?

Wu decided to investigate the hypothesis for her doctoral studies at the University of South Carolina. She did so by setting up a lab experiment and recruiting MBA students to participate.

“I created a ‘market’ with three investors and one firm manager, and set up the experiment so that it mirrors the existing incentives in a real market,” she explains. The use of an experimental market was necessary in order to study the incremental effect of each regulatory mechanism (increased manager liability and mandatory IC audit) given that both were simultaneously implemented.
DID YOU KNOW THAT YOU CAN CREATE A FINANCIAL MARKET IN A LAB? MUCH LIKE A GENIE IN A BOTTLE, THE EXPERIMENTAL SET-UP THAT YI-JING WU, PHD, ASSISTANT PROFESSOR OF ACCOUNTANCY, USES TO CONDUCT HER RESEARCH SHOWS THAT BIG IDEAS CAN FIT INTO SMALL PACKAGES.
In Wu’s experimental market, the manager starts out with $1,000 experimental dollars. This amount represents the limited resources available to the company. The manager must decide how much to allocate towards improving ICFR and how much to use towards generating profits for the company. Every dollar spent on ICFR makes accurate financial reports more likely, but reduces the amount available for the company to use to generate profits. This tradeoff, created in the experimental setting, is consistent with decisions managers face in the real world.

“The manager knows what he or she has spent on controls, but does not know with certainty whether it was enough to prevent and detect errors. The accounting system then spits out earnings numbers that the manager in turn reports to investors,” says Wu.

But here’s the rub: The accuracy of the earnings numbers depends on the funds allocated towards improving ICFR. If the manager spent enough—i.e., if the controls are effective—the earnings numbers are correct. If he or she did not, the earnings are overstated.

“And just as in the real world, the manager has to assess whether the system is reliable based on the amount invested in internal controls. Then he or she must report back to the investors. There’s an incentive to produce high earnings for your investors, obviously, and there’s a disincentive to report inaccurate numbers because it will tarnish the manager’s reputation,” Wu explains.

Wu wanted to know what would happen in the presence of SOX-mandated managerial liability, and in its absence. She also wanted to know how an IC audit would affect outcomes. So she built these different scenarios into her experiment. To make it really interesting, the student participants were compensated with real money based on investment decisions made during the experiment.

“It’s a real setting where your decisions have consequences,” says Wu. “Everything is anonymous, and the students do get into it. Towards the end they always start demanding to know, ‘Who is the manager?’”

Wu’s experiment showed that investors perceive expanded managerial liability and IC audits not as complementary measures, but as substitutes for one another. Studies have demonstrated that legal liability does encourage managers to communicate with their investors in good faith. However, Wu discovered that investors find managerial liability less reassuring than IC audits when it comes to buying stock with confidence.

“Internal controls are just one part of the SOX picture, and they are mainly a stay against unintentional mistakes, rather than fraud. It’s a hard call whether scandals like Enron would have happened had SOX been in place. Hopefully, the regulations do scare managers!” Wu says with a smile. “But I tend to think that if someone in top management wants to commit fraud, they’ll find some way to do so. What SOX does really well is to provide a safety net against unintentional errors.”

Wu’s market in miniature demonstrated not only that IC audits produce higher stock value, but that the SOX regulatory actions, particularly requiring IC audits, are appropriate measures in terms of improving investor confidence.

In her latest research, Wu has continued to explore the impact of SOX.

“I’ve been looking at the market effect of SOX regulations in my studies. But there have also been shifts in the traditional [external] audit process, so my current research evaluates the effects of these changes on external auditors’ practices, judgments, and decision making,” says Wu.

The lab experiments will continue as Wu integrates decision-making research from the field of psychology into her study of accountancy. Meanwhile, she also enjoys teaching financial and auditing courses for undergraduates and master’s-level students. One of the most enjoyable parts of teaching, says Wu, is when my students ask questions that I don’t know the answer to, but perhaps research can provide insight into the problem!”

And that about covers Wu’s attitude as a scholar, too: the greatest thrill comes from discovering an unanswered question.
It is no secret that the automotive industry is still churning through a period of historic disruption. Since 2008, Helper says, there has been no less than a 40% decline in automobile production in the U.S. Of Detroit’s Big Three manufacturers, only Ford declined government assistance and avoided bankruptcy during the current recession. Nor are car manufacturers themselves the only ones who have been affected: 25% of all U.S. manufacturing is tied to the auto industry. Given this fact, the Department of Labor is understandably eager to find out what the impact of the 2009 automotive bailouts has been on these related sectors.

“We are seeking to understand where recovery is happening, what is blocking recovery, and which workers and technologies are most resilient,” says Helper.

She is also after an understanding of the extent of the damage.

“We know there have been layoffs in the aftermath of the automotive crisis, and we know there have been bankruptcies. But we don’t know which firms have been affected,” Helper says.

Brian Peshek, project manager of Helper’s study, continues, “The federal government granted rescue ‘from above’ to Chrysler and GM. How this helped them, and their first-tier suppliers, has been examined. But the effects of the crisis on the thousands of smaller, lower-tier firms, and whether or not the benefits of the bailout have trickled down, remains unchronicled. That is part of what we are documenting.”

Helper says that some commentators have spoken of the crisis as a “Darwinian moment” from which only the strongest parts of the industry would emerge: “There have been claims that the fittest survived while the least fit perished, but we don’t have evidence of that,” she states.

The Department of Labor, meanwhile, is very interested in knowing which manufacturing sectors (particularly “green” sectors) are most receptive to former automotive workers. Where might their existing skills and expertise be maximized?

“For example, could a worker go from making auto parts to wind turbine parts? That would be the politician’s dream!” Helper says.

Susan Helper, PhD, Frank Tracy Carlton Professor of Economics, has studied the automotive industry for 20 years, a research interest that has taken her all over the U.S., and to Italy, Germany, France, England, Japan, Korea, Mexico, Brazil, and Canada. “’See the auto industry, see the world,’ is what they say,” Dr. Helper comments. Her latest project, however, is concerned with events much closer to home: The Department of Labor recently awarded Helper a grant of $850,000 to conduct a survey of American auto suppliers post-bailout.

Susan Helper, PhD, Investigates The Aftermath of the Auto Crisis

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It’s wonderful to have the ability to tap into this pool of brilliant students,” says Peshek. “We are so impressed with them.”

The Department of Labor grant also allows the survey team to take advantage of data collection services not available to Helper the last time she conducted such a sweeping survey, in 1993.

“It’s very different from the last time,” Helper says with a smile. “Then, we had armies of students licking envelopes. Even faxes were in their infancy. And our study was designed jointly with Japanese colleagues, so we made a lot of $80 phone calls.”

This time, Helper was able to hire DataStat, a company that specializes in data management, to make phone calls to companies and obtain the email addresses of willing survey respondents. These participants receive a link to a web survey. When the survey is complete, DataStat compiles and “cleans up” the results, sketching the big picture that Helper and her team will look at in detail.

But even though data collection is faster and easier in the 21st century, drafting survey questions remains a labor-intensive process.

“First, you need to decide what you want to know,” Helper explains—and this is a more nebulous target than one might think, especially given the scope of the events in question. There is much to know, but respondents’ time and knowledge are limited; the survey must turn up the data that will paint the fullest picture of the changing automotive industry given these limitations.

After deciding what she wanted to know, Helper canvassed the industry to gather “theories of what is happening. We conducted formal interviews with about 30 firms for this project.” Most of these firms are in Ohio, but Helper also interviewed subjects in Michigan, South Carolina, and Tennessee; the auto industry has been moving south over time. The next step was to set up an industrial and academic advisory board for the study.

Then, with input from her team, colleagues at other institutions, and a handful of trade organizations that are supporting the study, Helper developed the survey questions herself over the course of several months. Crafting survey questions is not a straightforward process. An article in the previous edition of this publication outlined the survey process faculty member Silvia Prina, PhD, Assistant Professor of Economics, used in rural Nepal. This involved a translator and home visits where much tea was drunk over conversations about the weather. Although Helper does not require a translator for her project, the study posed its share of challenges.

“You have to find ways of asking questions that can yield useful conclusions. Your questions must enable people to give you useful information without having to look anything up,” Helper explains. Asking someone to consult his or her records to answer a question is a sure way to put off a survey respondent.

Peshek continues, “What’s plaguing us is the nature of the sample. Some of the companies we are surveying are mom-and-pop shops, some are 10,000-member locations. How you ask questions varies greatly between two such different respondents. For example, our study has three areas of focus: operations issues, HR issues, and customer relations issues. In small firms, one person will answer all of the questions. In larger firms, many people will answer each of them.”

Helper has already revealed the initial results of the survey to the Department of Labor in a report entitled “The U.S. Auto Supply Chain at a Crossroads;” and will continue to pore over the data for months and years to come, mining it for information about the lay of the land post-bailout. In 1993, Helper’s survey produced a 60% response rate. Now, companies are so short-staffed that the team struggled to generate a robust rate of response.

“Now the survey is much shorter, but staffs are smaller and much busier,” she says.

“Companies are extremely reluctant to add staff, with good reason. But in many cases, they are too close to the bone to look strategically at changes going forward. Reducing headcount may be a way to weather a crisis, but it may not be good in the long run, for individual firms or for the supply chain as a whole,” says Helper.

Peshek adds, “Our survey, in part, encourages strategic thinking. Beyond that, we are producing firm-specific benchmarking reports for all respondents, so they can gauge themselves against other firms.”

Firm by firm, then, Helper and her team are starting to fill in the big picture of the U.S. auto industry in recovery mode. Media interest in the study has been strong, with Helper talking to outlets from local NPR affiliate WKSU to London’s Financial Times. The fate of this industry, long a vital part of the U.S. national identity, feels all too personal for many Americans. Those wishing to participate confidentially in the study should contact Peshek at brian.peshek@case.edu.
REGULATORS, INVESTORS, BANKERS, AND ECONOMISTS ALL KEEP AN EYE ON THE U.S. TREASURY YIELD CURVE, WHICH IS DETERMINED BY THE INTEREST RATES OFFERED ON TREASURY SECURITIES IN U.S. DOLLARS. THE YIELD CURVE REFLECTS THE CURRENT AND EXPECTED COST OF CREDIT AND THE EXPECTED RATE OF INFLATION—SIGNIFICANT CLUES TO THE STATE OF THE ECONOMY.

Yet when the shape of the yield curve changes, the cause (or causes) can be hard to pin down. It could be because expectations of future levels of inflation have changed; it could be because real rates have changed; or it could be the case that inflation risk premia, the compensation investors expect for bearing inflation risk, have changed. Thus, something as changeable as investors’ mood can alter the yield curve. For example, investors’ changing expectations for long- or short-term yields could be making them hesitant to buy now; or investors could be feeling conservative, demanding higher-risk premia to sweeten the deal when they take on longer-term bonds or what are perceived as riskier securities. Clearly, explaining the shape of the yield curve can mean factoring in fluid, rather unpredictable influences.
Peter Ritchken, PhD, Kenneth Walter Haber, Professor of Banking and Finance, has been working with Joseph Haubrich, PhD, Vice President and Economist at the Federal Reserve Bank of Cleveland, and George Pennacchi, PhD, Professor of Finance at the University of Illinois College of Business, to shed light on the factors that shape the yield curve.

Mathematical models have, until recently, not been completely satisfactory in accounting for all of the variables that influence the yield curve, as Dr. Ritchken says, “It seems that whenever a model is created to solve one feature, it is at the expense of other desirable properties. It has been difficult to have your cake and eat it, too!”

Now, Ritchken and his colleagues have succeeded in creating a superior model of the yield curve that better uncovers the trends underlying changes in the curve.

Through their research, the team of scholars has been able to decompose nominal yields into their real yields, expected inflation, and risk premia components. To do so, they analyzed decades’ worth of information on nominal and real term structures, together with historical data from surveys on inflation expectations, such as Blue Chip Financial Forecasts. They combined this with records of realized inflation and information provided by inflation swap contracts and Treasury Inflation-Protected Security (TIPS) prices. Inflation swaps are a type of derivative that investors use to hedge their bets against the risk of inflation. The researchers found that the inflation swap market “offers more precision in giving us information regarding real rates” than TIPS, primarily because the prices of TIPS have been heavily influenced by changing liquidity shocks, and because they seem to have been mispriced during and after the financial crisis.

Ritchken adds that, to his knowledge, his team is the first to exploit the information offered by the inflation swap market in this context, and notes that demonstrating the utility of inflation swap data is itself a fortuitous by-product of this project.

Decomposing the yield curve into real yields, inflation expectations, and risk premia also offers policymakers and finance professionals important information about the effects of policy. Real interest rates, for example, provide a measure of the economic cost of financing investments and the tightness of monetary policy.

The gap between nominal yields and real yields of the same maturity (the break-even inflation rate) depends not only on expectations of inflation, but also on inflation risk premia and on the differential liquidity risk between nominal and real bonds. Inflation expectations, meanwhile, can indicate the credibility of a government’s fiscal and monetary policies.

Disentangling these effects has attracted significant attention in both academic and practitioner circles. The results of the model—a dynamic arbitrage-free multifactor term structure model—have generated discussion in media outlets such as The Wall Street Journal and The Economist, and the Federal Reserve Bank of Cleveland now updates the model’s outputs on its website monthly. Much of the discussion has focused on its forecasts of expected inflation over different time horizons, as well as the changing magnitude of inflation risk premia. Given the significant response to these results, Ritchken expects to continue working in this “very fertile field.”
In a country—and a world—wracked by the “Great Recession,” films like Inside Job and daily news of the foreclosure crisis and widespread unemployment suggest that amorality is endemic on Wall Street, that financial sector workers simply leave their values at the door when they step into the office. However, a new study from Susan S. Case, PhD, Associate Professor of Organizational Behavior, and colleague Jaye Smith, PhD, Associate Professor of Business at Pepperdine University, suggests ways in which business school professors may work to change that.

Dr. Case and Dr. Smith, who completed her PhD in the Organizational Behavior Department at Weatherhead in 2002, recently coauthored “Contemporary Application of Traditional Wisdom: Using the Torah, Bible, and Qur’an in Ethics Education,” to be published in fall 2011 in a new Handbook of Research on Teaching Ethics in Business and Management Education.

Case and Smith acknowledge in their paper that in the contemporary business world, ethics are not the chief consideration in most decision making; in fact, studies have shown that many people who embrace religious values outside of work do not behave according those values while on the job. Essentially, these people separate the personal sphere from the professional, and exercise different morals in different contexts.

Yet at the same time, Case and Smith reveal in their article, at least five studies have indicated that business leaders with deep religious convictions are more likely to espouse ethical positions at work, including “poverty relief, human rights, community support, equal opportunity,

GOOD BOOKS, GOOD BUSINESS
SUSAN CASE EXPLORES RELIGIOUS TEACHINGS ON WORKPLACE ETHICS
environmental stewardship, and going beyond the law’s requirement.”

Case says that this area of study is in its infancy, but feels that what existing field studies have found is significant: “that people who have a strong religious identity consider the ethical implications of their actions more deeply while at work, and are more dismayed by actions they perceive as unethical while at work.”

Seemingly, two opposing takes on morality are at work here: one that views all of life as an opportunity to behave ethically, and another that sees the workplace as somehow outside the jurisdiction of moral values. Case and Smith write, “Bringing the weekend ethical standards of the synagogues, churches, and mosques into the weekday marketplace could significantly improve the workplace.”

In their paper, Case and Smith explore what the major monotheistic world religions, Judaism, Christianity, and Islam, have to say about business practices and raises the possibility that management professors should engage students in discussions of business ethics that are based around religious traditions the students may find familiar and powerful. The Torah, the Bible, and the Qur’an all discuss topics of morality in business, from the ethics of buying, selling, and lending, to social justice and environmental stewardship more broadly speaking. Commentary from these sacred texts in all three faiths further develops viewpoints on organized labor, collective bargaining, the workplace environment, and compensation that show how religious principles for behavior that are hundreds of years old can be applied in contemporary situations.

Codifying moral behavior at the workplace is vital, because the concept of work is at the heart of each religion’s ethical teachings. In Islam, perhaps because the Prophet Muhammad, himself, was a businessman, much emphasis is placed upon ethical behavior in business to avoid zulm: inequality, exploitation, oppression, or injustice. In the New Testament books containing the Letters of Paul, work is portrayed as a kind of worship. In Judaism, work confers dignity, or kavod (respect), upon the worker.

The three religions agree: The worker is responsible to his or her employer. In Islam, work is considered to be a religious duty that “must be done to perfection, with maximum effort, and loyalty to employers,” in Case and Smith’s words. In the Parable of the Master and Servant, Jesus suggests that one should go above and beyond the call of duty at work, not merely fulfilling minimal requirements. Jesus says, “To whomever much is given, of him will much be required; and to whom much was entrusted, of him more will be asked” (Luke 12:35-48).

This implies that the higher a person moves in a workplace hierarchy, the higher the moral standards, and the greater the care for subordinates, that person should have. Not only are employees called on to respect their employer and execute their work to the best of their ability, but the employer or manager has a mutual obligation to his or her employees. The story of the Jews’ enslavement in Egypt is central to Judaism, and Case and Smith explain that “dehumanizing or degrading labor”—which the Jews experienced in Egypt—“robs a worker of kavod.” The Sahih al-Bukhari, an important collection of hadith (sayings by or about the Prophet Muhammad recorded by early Muslim scholars), states that Muhammad said, “Those are your brothers [workers]…Allah has placed them under you…He said feed him out of what he himself eats, clothe him like what he himself puts on…” (Bukhari: 2359). In other words, a supervisor should treat his or her employee just as well as he or she is treated.

The employer’s responsibilities go beyond the individual employee, or even the company, however; he or she is also responsible to the community. A company creates jobs and brings prosperity to a community. It should also use natural resources respectfully and, when something goes wrong (for example, if it pollutes the air or water), clean up its own mess. “All three religions hold a biblical notion of people as trustees, in co-stewardship of the world that God created,” write Case
and Smith. In Islam, there is a term—khilafah—that describes humankind as God’s stewards of the earth. In the Old Testament, God tells human beings, “The land is Mine, for you are sojourners and residents with me” (Leviticus 25:23). Just like anything borrowed, the earth should be preserved in as good condition as it was lent.

Case surmises that the sacred texts of Judaism and Islam in particular are so densely populated with behavioral commandments because of the need to create political and legal systems for governance. For example, she explains, the laws of the Torah were conceived not only as religious commandments, but also as a legal framework that would govern the state of Israel when the Jews established it after their exodus from Egypt.

“Many of the laws, therefore, have nothing to do with God or spirituality, but are about creating an actual political and legal system which would govern people’s lives, and is still in place today,” Case says. “Codifying ethical behaviors in religious texts helped establish civil society, including people being responsible for one another, and responsible for ensuring that everyone was accorded dignity and respect at work.”

Interestingly, abiding by robust ethical principles may also be good for business. Case and Smith state that companies addressing environmental issues more effectively than their competitors enjoy accumulated returns over 60% higher than environmental laggards over a three-year period, and 10% higher returns over one year. Total per share returns on equity and earnings growth also correlate positively with environmental leadership, regardless of sector.

Another principle that Judaism, Christianity, and Islam have in common is transparency in buying and selling. The current financial crisis precipitated by unethical business practices is an example of what ignoring this principle can mean.

“When we do not have conversations about ethics, when we leave them at the door to the office, we get Enron, WorldCom, AIG, Goldman Sachs. Smart people acting stupidly,” says Case.

Nor is it solely money that is being mismanaged. In a world, Case and Smith write, that is faced with “global warming, biosphere erosion, rain forest destruction, and the greatest extinction of species since civilization began,” there is little evidence that humankind is taking its stewardship of the environment to heart. Furthermore, “poverty, illness, drought, homelessness, illiteracy, political unrest and despair,” and an ever-widening gap between rich and poor suggest that the Golden Rule that exists in Islam, Christianity, and Judaism alike is too often ignored.

Case has a suggestion as to where to begin to rectify these problems, and that is in management education. “Business schools are mandated to teach ethics by the Association to Advance Collegiate Schools of Business. But empirical research shows that ethics classes as they are taught do not lead to more ethical behavior. I think this is because these classes fail to speak to people’s own core values,” Case explains. “Perhaps by more directly engaging with people’s religious beliefs, we might do better.”

But Case and Smith do not propose turning business majors into comparative religion majors. Their view is much more practical than that: “Business goals include more than profit maximization and enhancing shareholder value. Students need evidence that honesty, fairness, trust, and doing right by employees, customers, and the global community can be profitable,” Case and Smith assert. They cite a number of companies that exemplify exactly that, such as Johnson & Johnson, which
still includes the “Credo” that was penned by founder Robert Woods Johnson in 1943, in its business plan. The Credo reads in part:

*We believe our first responsibility is to the doctors, nurses and patients, to mothers and fathers and all others who use our products and services. [...] We are responsible to our employees, the men and women who work with us throughout the world. Everyone must be considered as an individual. We must respect their dignity and recognize their merit. [...] We are responsible to the communities in which we live and work and to the world community as well. We must be good citizens—support good works and charities and bear our fair share of taxes. We must encourage civic improvements and better health and education. We must maintain in good order the property we are privileged to use, protecting the environment and natural resources.*

The Credo concludes with Johnson & Johnson’s responsibility to shareholders, and states that “When we operate according to these principles, the stockholders should realize a fair return.”

Case calls this Credo a “strategic moral compass” that has served Johnson & Johnson well. As evidence, she cites the company’s response to six 1982 deaths that resulted from consuming Tylenol capsules that had been tampered with. The tragedy prompted Johnson & Johnson to recall all Tylenol from stores and to openly warn the public—a move that risked the company’s reputation but ended up winning greater customer loyalty.

Case has drawn upon some of the most ancient wisdom known to show that corporate social responsibility is nothing new. And by helping business students to understand that, and to tune their moral compasses as finely as they tune their analytic skills, she is helping a next generation of leaders to live by words that are generations old.

**IMPORTANT TEXTS AND CONCEPTS:**


**Ethics education.** Education that encourages students to analyze their reasoning system for resolving ethical dilemmas.

**Hadiths.** Traditions based on what the Prophet Muhammad said or did on his own initiative, supplementing the Qur’an.

**Halacha.** The total body of Jewish Law. The Five Books of Moses contain 613 direct commandments concerning proper conduct that include more than a hundred to do with business and economics.

**Management education.** Education that takes place in schools of business and schools of management and prepares students to lead others.

**Qur’an.** Consisting of 114 suras, or poetic utterances, this spiritual guide and legal compendium contains provisions to govern daily life and local Muslim law.

**Talmud.** Oral commentaries on the Torah, compiled over seven centuries and filled with practical advice and moral guidance covering a wide range of human activities, including business dealings.

**Torah.** The basic source of Jewish law, comprising the Five Books of Moses (or Old Testament).
Much has been claimed about the characteristics of a great leader. The term itself is so familiar that it has lost its force; “leadership,” like “innovation,” is in danger of becoming a buzzword drained entirely of its meaning. Yet, again like innovation, leadership remains essential to a viable business, and a great leader can make all the difference between a dysfunctional organization and a working one.
Leaders who possess Emotional Intelligence (EI)—who are in tune with their own and others’ emotions—lay the groundwork for a positive atmosphere and a sense of purpose throughout their organization. What Dr. Boyatzis, Dr. Goleman, and Dr. McKee call “resonant” leadership inspires and motivates employees. If a leader’s manner and remarks do not resonate with employees, if his or her signals to employees are disjointed, an unpleasant tension may reign where there should be harmony.

And again, contrary to popular misconceptions about such traits, EI can be deliberately cultivated. One organization that takes this principle to heart is Scottish Enterprise, a government agency that promotes economic development throughout the greater part of Scotland. Weatherhead’s executive education team has worked with Scottish Enterprise since 2009 to tailor a leadership program to the agency’s changing needs.

“I suppose a definition of leaders as opposed to managers is that leaders are expected to work as strategists in addition to managing people, and that strategic aspect has been our focus,” says Steve Slater, director of human resource development at Scottish Enterprise. “So all of our leaders, including Lena Wilson, our chief executive, and the six members of her Executive Leadership Team (ELT), have been through our Personal Leadership Program. That cuts right across our organization in terms of functional responsibility. Graduates of the program are everywhere.”

Scottish Enterprise works with high potential companies like Senergy, an energy services company; BiP Solutions, a supply chain management firm; and Vets Now, an innovative supplier of emergency veterinary care, helping them to scale their business to the next level. These growing companies are also able to reap the benefits of the relationship that Scottish Enterprise has built with Weatherhead.

“We offer executive education opportunities to selected companies based on the potential they have to impact disproportionately on the Scottish economy, whether through a great business model, a particular tech edge, or a strong and growing position in the market,” says Scottish Enterprise’s Clive Palmer, who is responsible for executive education programs. “These companies have impressive growth records and a level of ambition for the future that sets them apart,” Palmer says.
However, these companies face the same challenges in strategy, leadership, and culture change that any fast-growing business does.

“All of the companies we work with agree that their most important resource is the potential of their own people,” says Clive Palmer. “So culture change and leadership issues have risen to the top of these businesses’ agenda.”

Melvin L. Smith, PhD, Associate Professor of Organizational Behavior and Faculty Director of Executive Education, has taught EI and leadership around the country and across the world, and has travelled to Scotland many times to deliver leadership workshops for Scottish Enterprise and a number of its client organizations.

Palmer calls Dr. Smith’s workshops “transformational” and notes that companies he introduced to Weatherhead leadership development have gone on to contract with the school independently. “This speaks volumes about the value delivered by Weatherhead faculty,” Palmer says.

Says Janelle Luz, product development specialist at Weatherhead Executive Education, “Our clients at Scottish Enterprise are very discerning when it comes to the type and quality of education they are looking for. They met their match when they started working with Melvin: they found an amazing, charismatic instructor, EI learning that has years of study to back it up, a trusted source, and a methodology that has impact. Melvin brings content with the right intellectual heft for our clients.”

Smith says of his work with Scottish Enterprise, “One thing that has started to sink in is that the essence of what we are teaching about emotionally intelligent leadership transcends cultural differences.” He continues, “The things that we teach and the things we believe about leadership really are universal.”

Between assessing the results of their Personal Leadership Program experience with Weatherhead and gaining feedback from the companies they serve, leaders at Scottish Enterprise decided that EI material should be made more broadly available to the organization’s own employees.

“Our leaders have been through the Personal Leadership Program, but we wanted to cascade this to all people managers throughout our whole organization,” Slater explains. He came up with a way to do so when Smith visited Scottish Enterprise while the organization was hosting a conference for Scottish Development International (SDI). Slater asked Smith to come a day earlier to lead a two-hour session for SDI managers.

“Watching Melvin deliver a two-hour vignette, I thought, ‘That’s exactly what I need,’” says Slater. “Afterwards, I asked him how he would feel about us taking that two-hour workshop and delivering it ourselves. So Melvin took part of his total model and put together a video-based course.”
The course covers quadrant self-awareness, a foundational concept in emotionally intelligent leadership. EI is broken down into four behavioral clusters: self-awareness, self-management, social awareness, and relationship management. Mastering these personal and social competencies is a vital step on the journey to resonant leadership.

The course content is delivered by Smith in prerecorded web videos that alternate with group activities facilitated on-site by Scottish Enterprise team members who have completed the Personal Leadership Program. The delivery method combines the intangible, but vital, energy that an engaging teacher like Smith brings to the subject at hand with the convenience and cost-effectiveness of local facilitation.

The chief executive, the ELT, and selected members of the human resources team at Scottish Enterprise participated in a training program in January to prepare them to facilitate the coursework themselves. “We called it ‘Train the Trainer,’” says Luz, who flew to Scotland to help administer the training session. “But we also ended up referring to it as ‘Melvin in a box’!”

Separately, the Hay Group formally accredited the Scottish Enterprise HR team members as facilitators of the 360-degree assessment and development process developed by Boyatzis, Goleman, and the Hay Group, which is completed in advance of the EI program by all participants. During the workshop, each participant receives a copy of their feedback report and a follow-up one-on-one session with an accredited HR member to fully understand the data, which allows them to plan their subsequent development.

The Scottish Enterprise cohort spent a day with Smith to go through the EI video learning program step by step. “Of course, the participants learned the functionality of the course site, but more importantly, they got access to Melvin and his years of experience,” says Luz. Smith was on hand to dispense advice and to answer questions like, “If this comes up, what do you usually say? What do you do if people just stare at you like deer in headlights?” Along the way, the team discovered how to give the program that Scottish Enterprise flavor. We had created a facilitator guide, and they enhanced it to infuse it with their specific organizational values,” Luz says.

Luz says that Scottish Enterprise has chosen an unimpeachable route to “ingraining this material throughout their organizational culture.”

She continues, “They were unbelievable! At Weatherhead, we have an ideal model for training and development. Scottish Enterprise is literally implementing that ideal model. Their top leadership have all accepted the challenge to practice resonant leadership, mentor and coach their people, and support 360-degree feedback. They knew that this was not an ordinary leadership training gig, that if they really believed in it, its impact on their organization would be huge. And Scottish Enterprise touches the whole country of Scotland. So these leaders can have a national impact.”

Palmer has trained as a facilitator for Smith’s video-based course, and has started taking the show on the road to client companies. According to Luz, feedback has been overwhelmingly positive and has already helped the Executive Education team enhance and improve the product.

Slater says, “We do miss having Melvin in the room, but we discovered that as a team, we have the ability and knowledge to do this.”
Celebrating the Fowler Center for Sustainable Value

An audience of Weatherhead students, faculty and staff, friends of the school, and well-wishers from the community gathered on May 9, 2011, to celebrate philanthropists Char and Chuck Fowler and their $7.5 million gift to establish the Fowler Center for Sustainable Value at Weatherhead. Employees of Fairmount Minerals, the Cleveland company headed by CEO Chuck Fowler, were also sprinkled throughout the audience as Roger Saillant, PhD, executive director of the Fowler Center, praised the Fowlers' commitment to “doing well by doing good.” “We need more people like Chuck in business. We need more people like Char in philanthropy,” said Dr. Saillant.
The Fowler Center leverages interdisciplinary scholarship and practice to help leaders capitalize on new profitable business opportunities to solve the world’s growing social and environmental problems. It does so through a three-pronged effort: research, collaboration, and outreach, with an emphasis on value creation for businesses through embracing sustainability. Since the Fowlers made their 2009 funding commitment, Fowler Center staff have been hard at work building the three facets of this ambitious mission from the ground up.

Says Beau Daane, manager of the Fowler Center, of the timing of the celebration, “We’ve reached a critical point where our projects have traction. We are helping to shift paradigms, but culture change doesn’t happen overnight. With our commitment to scholarship, networks, and outreach, we are literally trying to change the world. It will take a long time to get where we need to be, but we have made great progress.”

And that, in a nutshell, is why notable figures—Saillant; Barbara R. Snyder, president of Case Western Reserve University; David L. Cooperrider, PhD, Fairmount Minerals Professor in Social Entrepreneurship and Professor of Organizational Behavior; and keynote speaker Peter M. Senge, PhD, Senior Lecturer in Leadership and Sustainability at MIT’s Sloan School of Management—came together to endorse the center’s work and praise its benefactors.

Dr. Senge, a recent addition to the Fowler Center advisory board, spoke about how business leadership can and must lead the way for society by deciding to make sustainability a priority while enhancing profit. A prime example is Fairmount Minerals itself, a large industrial sand company that includes environmental and social sustainability in its mission statement.

Chuck Fowler, himself a graduate of the Weatherhead Executive MBA program, addressed the assembly with characteristic brevity, speaking to the importance of the Center’s mandate to “build the road map companies need to use” to achieve sustainable growth in harmony with their communities and the planet.

Read more from Senge in his editorial on page 4.
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CLASS OF 1964
Norbert Lewandowski, MBA, was inducted into Cleveland’s Benedictine High School Alumni Association’s Hall of Fame.

CLASS OF 1970
Richard Crossland, MBA, was appointed to the board of directors of Mobile Protective Space, a startup developing armor shielding for military vehicles to protect against IEDs and EFPs primarily in war zones.

CLASS OF 1972
F. David Coleman, MS, was appointed Director of Officiating for the National Football League.

Nina Rosoff, PhD, recently published The Power of Paradox: The Protean Lender and Leading in Uncertain Times which can be found on www.routledge.com/books/details/9780415875110.

CLASS OF 1975
Michael E. Gibbons, MS, was appointed judge at the 2011 Northeast Ohio Entrepreneur of the Year Awards gala.

CLASS OF 1978
Richard D. Thomas, AMP, retired from a long career in the healthcare field.

CLASS OF 1979
Donald Washkewicz, MBA, was featured in Crain’s Cleveland Business’ “Who’s Who in Northeast Ohio.”

CLASS OF 1980
Raymond L. Cushing III, MBA ’80, MAcc ’87, was appointed treasurer at the Beck Center for the Arts.

Joseph Scaminace, MBA, was featured in Crain’s Cleveland Business’ “Who’s Who in Northeast Ohio.”

CLASS OF 1981
Robert S. Strickland, MA, was appointed project superintendent of PCS, Inc.

CLASS OF 1982
Philip Alexander, MBA, was featured in Crain’s Cleveland Business’ “Who’s Who in Northeast Ohio.”

Dennis Conrad, MAcc, received the Accounting Alumnus of the Year award presented by Weatherhead’s Accountancy Department.

CLASS OF 1983
Lawrence Francis Cruise, MAcc, was appointed treasurer of First Tee of Cleveland.

Kathryn Loomis Kaesberg, MBA, was elected chair of the board of directors of the Benjamin Rose Institute on Aging.

CLASS OF 1984
Beth Draegin Rosenberg, MBA, was appointed vice chair and secretary of Youth Opportunities Unlimited.

CLASS OF 1985
Daniel Samuel Herman, MBA, completed a recent online interview by HIStalk regarding his company, Aspen Advisors.

CLASS OF 1986
James E. Merklin, BS ’86 and MAcc ’87, was appointed treasurer at Northeastern Ohio Universities Colleges of Medicine and Pharmacy (NEOUCOM) Foundation.

CLASS OF 1988
Col. George F. Qua, CNM, was appointed to the Ohio Veterans Hall of Fame, Class of 2010.

Mark James Royle, MBA, was appointed treasurer of the JD Breast Cancer Foundation.
CLASS OF 1989

Alan Zang, MBA, was appointed vice chair for development at Young Audiences.

CLASS OF 1990

Arthur Anton, MBA, was recently featured in *Crain's Cleveland Business*’ “Who's Who in Northeast Ohio.”

Chuck Fowler, EMBA, was featured in *Crain's Cleveland Business*’ “Who's Who in Northeast Ohio.”

CLASS OF 1991

Radhika Reddy, MBA, was featured in *Crain's Cleveland Business* for development of the Ariel International Centre.

Susan Irene White, MBA, was appointed president and CEO of Enterprise Cleveland Group.

CLASS OF 1992

Michael Petras, Jr., MBA, was featured in *Crain's Cleveland Business*’ “Who's Who in Northeast Ohio.”

CLASS OF 1993

Elisa Riva Budoff, MBA, was appointed senior vice president of investments for Wells Fargo Advisors.

Robin Gantt, BS, was appointed CFO for the Northwest Pipe Company.

CLASS OF 1994

Lloyd W.W. Bell III, MBA, was featured in *Crain's Cleveland Business* discussing purchasing a business.

Fiona Chambers, BS, was named one of *Crain's Cleveland Business*’ 2011 “Forty under 40” rising business stars.

Kay Molkentin, MBA, was appointed director for the Centre for Integrated Entrepreneurship at Hiram College.

CLASS OF 1995

Ted Evans, Jr., MBA, was appointed to the Newry Corporation.

Stephen Abraham Lippman, MBA, was promoted to assistant vice president at Bank of America.

CLASS OF 1996

Michael C. DeAloia, MBA, was appointed director of e-marketing at Insivia.

Gail Liggett, PFP, was appointed branch manager for First Federal of Lakewood.

CLASS OF 1997

Gene George, MS, was appointed senior human resources manager for the Power Quality Operations Divisions of Eaton Corporation.

Eric P. Hollinger, MBA, was appointed senior vice president and commercial lender of FirstMerit Bank.

Ronald Ulle, MBA, was appointed senior director of portfolio management of the Ohio region for BNY Mellon Wealth Management.

Todd Wade, MBA, was appointed senior vice president at KeyBank.

CLASS OF 1998

Daniel Berry, EDM, was featured in *Crain's Cleveland Business*’ “Who's Who in Northeast Ohio.”

Delfino Lares, MBA, was appointed business manager of the oil field and fuels unit of Vantage Specialty Chemicals.

Russell Lombardo, EMBA, was appointed director of the Wellspring and Stockamp Division of Huron Healthcare.

Scott Michael Simon, MNO, was appointed chair-elect of Shoes and Clothes For Kids.

CLASS OF 1999

Odell Coleman, MBA ’03, MNO ’99, principal of ColemanWick, LLC, is involved in researching and integrating wind energy in Warren, Ohio.

Carmen Dumitrescu, MBA, was ranked among the “Most Important 1,000 People in Business” by *Who's Who in Business Romania* 2010.

Betsy Figgie, MBA, was named one of *Crain's Cleveland Business*’ 2011 “Forty under 40” rising business stars.

Matthew Figgie, MBA, was appointed to University Hospitals’ board of directors.

CLASS OF 2000

Brian Douglas Bornino, MBA, was promoted to partner at GBQ Holdings, LLC.

Leslie Dickson, PFP, was appointed chair of the Greater Cleveland Better Business Bureau.

Gulam Khan, MBA, was featured in *Crain's Cleveland Business*’ “Who's Who in Northeast Ohio.”

Randolph Markey, EMBA, was appointed president-elect at the Association for Corporate Growth Cleveland.

Tyrone Scott, MBA, was appointed vice president of small business customer retention at Citibank.

Elaine Szeto, MBA, was appointed senior vice president at PNC Financial Services.

CLASS OF 2001

Kristin Walker Boose, JD/MBA, was appointed trustee of the Cuyahoga Valley Scenic Railroad.

Jason Wei, MBA, founded and was appointed president of the GLocalizing Group.
CLASS OF 2002

Patrick Mulloy, MBA, was named one of Crain's Cleveland Business’ 2011 “Forty under 40” rising business stars.

Patrick Gerald Paoletta, MBA, was appointed vice president, senior commercial relationship manager at Huntington Bank.

Kiley Patricia Smith, MBA, was appointed business client relationship manager of U.S. Bank.

Joseph Paul Starck, EMBA, was appointed president of the Great Lakes Towing Company.

CLASS OF 2003

Akan Abdula, MBA, was recognized in the U.K’s Daily Telegraph for his presentation for the Thought Exchange trip organized by the newspaper with HSBC.

Michael Brink, JD/MBA ’03, BA ’99, was appointed counsel at Tucker Ellis & West LLP and participated in the Ohio State Bar Association’s Leadership Academy.

Susan McTiernan, EDM, was appointed associate dean for the graduate programs and associate professor of management at Quinnipiac University School of Business.

Barbara K. Mistick, EDM, was appointed president of Wilson College.

CLASS OF 2004

Dr. Karie Ann Willyerd, EDM, was appointed vice president of learning and social adoption at Jambok, a division of SuccessFactor.

The cover story of the April 2011 issue of Smart Business Cleveland, “Why Jennifer Deckard Listens and Collaborates at Fairmount Minerals,” featured Jennifer D. Deckard, EMBA.

Erin C. Hewitt, JD/MBA, was appointed associate at Thompson Hine LLP.

Theodore Hoffman, MBA, was appointed vice president of support services at Lake Health.

Brett Johnson, MBA, was appointed vice president of senior capital markets at FirstMerit Corp.

Max Krumpholz, BS, was appointed manager at Grant Thornton LLP.

Cynthia McMeeken, MBA, was recently married.

Jill M. Paulsen, MNO, was appointed director of grant programs at Cuyahoga Arts and Culture.

CLASS OF 2005

Jeannine Gury, MBA, established a new business, Freshwater Coaching.

CLASS OF 2007

Randall Bret Autrey, MBA, was appointed research programs coordinator at the University of Florida’s Department of Pediatrics.

Jeffrey Thomas Cicarella, JD/ MBA, was appointed associate at Taft Stettinius & Hollister.

William DiMenna, MBA, was named Laird Technologies’ EMI solutions division’s product director.

Darren Theodore Hamm, MNO, was promoted to deputy director at Neighborhood Housing Services of Greater Cleveland.

Monika L. Hudson, EDM, was appointed tenure-track assistant professor in the areas of public administration, entrepreneurship, and organizational behavior at the University of San Francisco.

Brent Leslie, MBA, was named one of Crain’s Cleveland Business’ 2011 “Forty under 40” rising business stars.

Jonathan Nook, EMBA, started a new brand: Genius Chargers.

CLASS OF 2008

Ryan A. Terry, EMBA, was named one of Crain’s Cleveland Business’ 2011 “Forty under 40” rising business stars.

CLASS OF 2009

Darren Good, PhD: see above under Class of 2007.

Rhoan Izar Hernandez, EMBA, was promoted to senior vice president and real estate services manager for First National Bank of Pennsylvania.

Barbara Lund, MBA, was appointed development research analyst at Georgia Institute of Technology.

CLASS OF 2010

Michael Houseman, EMBA, was appointed treasurer at the American Advertising Federation’s Akron chapter.

Erica L. Jones, MS, received the 2011 Women Trailblazer Award from the University of Akron.

Patricia Jurca, MBA, was appointed director of marketing at the Weatherhead School of Management.

Christopher Male, MBA, was appointed senior financial analyst in the real estate and development group at Hyatt.

Kyle Orban, MBA, was appointed consultant at Jaguar Mining.
FORWARD THINKING:  
THE CAMPAIGN FOR CASE WESTERN RESERVE UNIVERSITY

Case Western Reserve University and its distinguished Weatherhead School of Management are home to visionary leaders for whom the unknown is not the destination—it is the starting line. Members of our campus community stretch creativity, push innovation, and help others exceed their potential.

On October 13, 2011, President Barbara R. Snyder announced a $50 million commitment by Al and Celia Weatherhead to be divided equally between the Weatherhead School of Management and a new Weatherhead Institute for Family Medicine and Community Health.

This extraordinary gift is the single largest contribution in our history and a commitment that inspires us to think beyond the possible to reach our $1 billion fundraising initiative.

We are honored by the Weatherheads’ legacy of generous support and unwavering commitment. Please join the Weatherhead community in engaging in Forward Thinking, so that we may all work together to transform our world for the better.

“BEFORE YOU RIGHT NOW IS THE OPPORTUNITY TO PUT YOUR PROBLEMS IN PERSPECTIVE AND THUS TRANSFORM YOUR WORLD—AS WELL AS THE WORLD—BY GIVING OF YOURSELF TO OTHERS.”

– ALBERT J. WEATHERHEAD III, THE POWER OF ADVERSITY

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