Diversity and Inclusion within the *Journal of Case Studies*

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Diversity and inclusion are important topics for students to consider as part of their educational experience. Not only are these subjects important as part of a general education, but also a variety of institutions place value on these constructs, ranging from governments to educational institutions to businesses. The Society for Case Research and *Journal of Case Studies* are no exception to this assertion. Both the organization and our journal value diversity and inclusion.

According to the Merriam-Webster dictionary (2017), diversity is defined as having a group of different people who vary in race or culture. Wise and Tschirhart (2000) explain that diversity is composed of a mix of human “differences and similarities” … “based on race, culture, religion, gender, sexual preference, age, profession, organizational or team tenure, personality type, functional background, education level, political party, and other demographic, socioeconomic, and psychographic characteristics” (p. 387).

Inclusion consists of “bringing together and harnessing diverse forces and resources in a way that is beneficial” (Jordan, 2017). In fact, Jordan (2017) states that inclusion goes beyond diversity and involves the practice of embracing diverse forces and resources to create an environment of “involvement, respect, and connectedness” that results in capturing diverse perspectives and harnessing them for the betterment of the organization. Jordon also argues that organizations need both diversity and inclusion in order to succeed. Thus, these important constructs appear to go hand-in-hand.

Diversity and inclusion are important to organizations for a variety of reasons. Nally (2015) states that diversity and inclusion are important because everyone deserves an equal opportunity; companies that embrace diversity have a higher market share; recruiting a diverse pool of employees fills the talent gap; diverse teams out perform their counter parts more often; and working with a diverse set of people gives everyone a chance to learn and grow. Simply put, diversity and inclusion make organizations more supportive and equitable, which enhances innovation, creativity, and helps improve the group over time.

The Society for Case Research (SCR) and the *Journal of Case Studies*, like other organizations, value diversity and inclusion as important topics for inclusion in its publications. SCR believes that diversity and inclusion in its membership base and in submitted and published cases helps make SCR a better professional organization. Furthermore, we as editors of JCS, believe
that incorporating diversity and inclusion in the journal’s published cases is valuable for our not only our membership, but also for the field of case writing and for students and faculty who use these case as part of their courses.

The Student Perspective

We assert that the use of cases in the classroom enhances the student’s experience and potential for learning and growth. For example, Cellucci, Kerrigan, and Peters (2010) discuss how cases may provide opportunities for students to observe scenarios in class before entering the workforce. Moreover, they enable students to practice working effectively in teams, and hone critical thinking skills through class discussion and individual reflection.

The use of cases on diversity and inclusion also introduces subject matter that students in majority and minority groups may not have experienced. Students who study cases that include discussion on issues of poverty or chronic health conditions are exposed to the role of the other. This exposure allows us to development our self, via reflection of organized attributes of our communities (Mead, 1934). Moreover, our studying cases that have a minority protagonist allows minority students to see themselves in professional settings. As Adichie (2017) discussed, there is a danger of a single story, of only showing people through one lens (i.e., all protagonists as white while others are secondary). To illustrate, Cellucci and Wiggins (2010) present Mr. Khil, a patient admitted to the hospital. He did not speak English, and in accordance with his cultural mores, his family spent the majority of the day and night with him. Because of the noise and congestion caused by the large number of family members in the room, a frustrated nurse called security to have the family removed. The use of this case study in the classroom allowed students to consider cultural relativism and cultural adaptability in the safe construct of the class. That is, the students have the opportunity to study real life examples of professionalism and how to handle cultural differences and situations that will arise at some point in their careers. And hopefully, they will not resort to calling security as did the frustrated nurse.

Literature on Diversity and Inclusion in Case Writing

While there has been a growing literature on case writing that has been in existence for quite some time (Peters, Cellucci and Ford, 2015), there is very little literature on diversity and inclusion in case writing. And, of the few articles published on the topic to date, most focus on examining women and minorities in cases, which we feel is a somewhat limited view of diversity (i.e., recall that Wise and Tschirhart (2000) state that diversity can be based on a much wider set of variables than just race or gender).
Totten (2003) appears to have been the first to examine diversity in case writing. For that paper, Totten reviewed 214 cases published in the Annual Advances in Business Cases, Business Case Journal, and Case Research Journal. He found that of these cases reviewed, only three (i.e., 1.4%) examined minority owned businesses. Around that same time, Gagnon and Morgan (2004) published an article that also examined business cases published in academic journals and online resources. They found that, despite the many significant issues minority businesses face, less than 1% of the cases examined were focused on a minority-owned business.

In 2006, Gagnon, Morgan and Totten decided to survey minority business owners and managers to assess their willingness to participate in case development. Knowing more about the willingness of minority business owners and managers may be part of the puzzle as to why these researchers found such low rates of cases published on minority owned businesses in previous studies. The results of their survey indicated that off the 355 responses, 21 had previously participated in case development related to their business. Furthermore, Gagnon, Morgan and Totten (2006) found that more educated business owners, those that knew what cases were about, those who were trying to sell or expand their business (i.e., undergoing change), and those who were promised confidentiality and a full review of all case documents were more willing to participate.

Gagnon, Morgan, and Totten (2007) then conducted a follow up study to their 2006 survey in which they contacted the 21 minority business owners who had previously participated in case studies and asked them five open-ended questions. With respect to the results, six of those surveyed indicated that cases had been written about their companies, but none of these cases was ever published in a journal. The respondents indicated that the cases were used for classroom purposes or presented at a conference but never published. Furthermore, all survey respondents indicated that they would be willing to participate in case development in the future. Thus, the authors concluded that the dissemination of cases was more of a problem than the writing of cases focused on minority owned businesses (Morgan, Gagnon, and Totten, 2009).

In 2008, Totten and Gagnon also conducted a follow-up study to Totten (2003). Utilizing Totten’s (2003) methodology, they found a slight improvement over that of 2003 in that five (i.e., 2.6%) of the 186 cases examined had a minority business owner. (Note: one case had a minority decision maker but that was reported separately in order to facilitate comparison over time.)

Totten and Irtisam (2013) also did a ten-year follow-up study to Totten (2003). They again followed Totten’s (2003) methodology and examined
219 cases from three journals. Totten and Irtisam (2013) found that 6 (i.e., 2.7%) of the 219 cases focused on minority-owned businesses, which is a similar publication rate to that reported in Totten and Gagnon’s (2008) first follow-up study. Thus, there has not been a steady improvement in the number of published cases on minority-owned businesses overtime, despite these authors’ many calls for more work in the domain.

The State of Affairs for JCS

With respect to the *Journal of Case Studies*, the editors read the work of Totten and his colleagues and were curious as to how our journal has fared with respect to diversity and inclusion, since we assumed leadership in 2011. However, we began our examination of the journal contents taking a wider view of diversity and inclusion, per Wise and Tschirhart (2000). We wanted to see how many published cases within the Journal of Case Studies focused on “vulnerable populations.” “Vulnerable populations” include, “the economically disadvantaged, racial and ethnic minorities, the uninsured, children, the elderly, homeless, and those with chronic health conditions, including those HIV and mental illness)” (AJMC, 2006, p. 1).

Note, women are not included in the definition of vulnerable populations; thus, this demographic group was not included in our analysis. We were also comfortable with this, as Totten and Irtisam (2013) found that 12% of the cases they examined were focused on women-owned businesses or women managers, which was significantly higher than the 2.7% of cases on minority-owned businesses. Furthermore, we did not just focus on the “business owner or manager” but took a broader look at the case in general for our analysis. Thus, our analysis did not just count “minority business owners” or “minority managers.” The sample included cases that related to a vulnerable population in general. For example, if a case included consumers who were part of a vulnerable population that was being targeted by a company, we included it in our analysis.

In addition, since we have taken leadership of JCS, we moved publication of the journal online. Thus, we examined only those issues of the Journal of Case Studies that have been published on our website from 2012-2015 (which was a total of 79 cases). We are pleased to report that the results of our analysis showed that during these three years (with two issues per year), we had more than one case each year that focused on a vulnerable population (See Table 1 below).

Table 1. Summary of JCS Cases that Focus on Vulnerable Populations

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<th>Year of JCS Publication</th>
<th>Volume (Issue Numbers)</th>
<th>Number of Cases Identified</th>
<th>Vulnerable Populations</th>
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Across all four years (2012-2015), we published a total of 79 cases and nine of these were related to a vulnerable population. We suspect that if we had included women as a demographic group in the analysis, the numbers would have been even higher. However, those 9 cases translated into an 11.39% publication rate. While this number could and should be improved, it is higher than the numbers as reported by Totten and his colleagues for previous studies. While this number implies that JCS is above the average, we believe that this number could be higher and would like to encourage more authors to write cases on vulnerable populations and submit them to JCS for review.

In This Issue

Four of the eight cases have minority protagonists or have subject matter that relates to issues relating to vulnerable populations (health conditions, potentially uninsured, and economic status). For example, in “WWJD? Frankincense Distiller Considers Fair Trade Certification,” Mr. Ibrahim, originally from Northern Somalia, was the founder of Boswellness—a firm based in Vermont. As Mr. Ibrahim decided whether or not to obtain Free Trade status for his already certified, organic company, he maintained commitment to the business principles that focused on sustainability, source community development and product quality (Olsen et al, 2017).

Also of note regarding minorities as the protagonist, Butz et al (2017) in “Technological and Consumer Shifts in the Music Industry” address how one
musician (rapper Jay Z) reimagined the Tidal streaming service for music. His effort centered on both economic viability and fairness to artists factors as key factors in the strategic and innovative management initiative.

Harris and Hylock (2017) address issues of what might happen when product quality is in question for a patient with a chronic health condition. In “Was the Hyperglycemia Due to a Bottle of Bad Insulin?” the focus is on medical practice office management and coding of patient encounters. Nonetheless, the case highlighted the significance of health professionals paying attention to detail and listening to patients (especially with chronic health conditions) when they are in their care.

Dalsem (2017) included the variable of community impact when he described the case of “Renaissance Learning, Inc.” As two companies vied to bid for the firm, the founders and majority stockholders of Renaissance Learning, Inc. not only considered price, but also the variables of community and community interests that might be affected by the purchase. Which firm’s bid was accepted reflected the significance the founders and majority stockholders gave to community interests.

**Possible Solutions**

Given that the editors would like to see more cases published in JCS that focus on vulnerable populations, we brainstormed to develop a list of possible activities that the Society for Case Research could do to help rectify the problem. First, we thought that SCR could consider asking one of its journals (i.e., JCS, BCJ or JCI) to publish a special issue on diversity and inclusion. The cases to be considered for this issue could relate to vulnerable populations in general or even focus specifically on minority-owned businesses or minority managers making decisions. Furthermore, the organization could invite some informal leaders in our group that have personal or professional experience with vulnerable populations to guest edit the special issue.

Second, the Society for Case Research could consider giving an award (or some other form of recognition) for the best case that relates to a vulnerable population every five years. The organization could even try to seek a donor to sponsor a cash prize for the award to encourage participation. We believe that this award would potentially highlight the importance of cases that focus on vulnerable populations to our membership and also get our members excited about writing these types of cases.

Third, we also thought that the Society for Case Research could highlight diversity and inclusion in its newsletters and on its website. For example, diverse case writers that are part of our membership could be featured in the newsletter. SCR could also create a special page on its website for the organization to highlight diversity and inclusion cases.
that SCR has published over time. These activities would help to promote and disseminate diversity and inclusion cases to the larger field of academics.

Fourth, SCR could improve its efforts to recruit a more diverse membership base. The editors did not do an analysis of the SCR membership for purposes of diversity and inclusion, and we certainly do have diversity among our membership. However, if the organization increased its efforts to recruit more diverse members and then helped mentor these new case writers, the organization could potentially see more cases written about minority-owned businesses, minority managers, and other vulnerable populations.

Fifth, SCR could task some of its members to identify minority business owners that would be willing to let professors write cases about their companies. This may prove quite a challenge, but organizations (such as the Small Business Administration or NAACP) might be willing to help promote our cause among their minority membership. SCR could then generate a list of minority-owned businesses and share that document with our members who request contacts for purposes of case writing.

In summary, diversity and inclusion are clearly important topics in today’s society. SCR takes these constructs seriously and the editors of JCS value cases published that focus on minorities and other vulnerable populations. And while over 11% of the cases we have published at JCS (from 2012-2015) focus on vulnerable populations, the editors would like to see more cases written in this domain. Moreover, we would like to encourage SCR and our membership to take action in an effort to improve the publication of diversity and inclusion cases over time.

References


Harris, S. and Hylock, R. (2017.) Was the hyperglycemia due to a bottle of bad insulin? Journal of Case Studies 35(1), 91-101


