JoeLouie's restaurants: a business case

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Abstract

This case focuses on an internal investigation that is triggered by a sexual harassment claim. The current General Manager is responsible for a termination that cues the business owners to initiate a deeper investigation of human resource, leadership, and culture issues. Numerous details are provided about daily operations in a small corporate restaurant chain, so students have ample opportunity to analyze and synthesize a broad body of facts toward providing recommendations to resolve a number of problems. The case is designed to expose students to multiple issues, both Human Resources and Leadership, with strategic implications and ties to every function in the organization. The tools found in teaching notes help students capture information in an organized and thoughtful manner thus enabling them to fully assess the current challenges facing the organization. This paper tells the story of an organization that is learning and making decisions to keep it forward thinking for another 30 years.

Keywords: Change, Leadership, Strategic Human Resources, Culture

INTRODUCTION

This case aims to demonstrate the complexities of leadership, culture, and human resources management as they relate to strategic decision making. The teaching notes are designed to expose students to multiple issues with strategic implications and ties to every function in the organization. This case also demonstrates the systemic nature of organizations and how small changes in one aspect can have ripple effects across the entire organization.

Human Resources (HR) professionals are often taught HR as a set of disconnected skills/bodies of knowledge that exist independently within an organization. Teaching vignettes are often small and constrained to a few questions. This case is designed to have students approach multiple issues within context. The case as well as tools provided within the teaching notes are designed to provide a framework within which students can assess any Leadership or HR case toward analyzing and resolving problems in a real organizational setting.

The goal for using this case is for students to internalize that leadership responsibilities are strategically tied to every function in an organization, so undermining or under focusing on leadership creates a fatal bias toward underachieving for organizational success. Human resources processes are control processes within the context of the organization. This opens the class for a discussion of the importance of control systems on the viability of any organization.

HR professionals are expected to be Subject Matter Experts (SMEs) on a number of topics. To foster this broad base of expertise, exercises found in Teaching Notes foster student application immediately to work situations. The tools provide a framework not only for assessing HR functions but also for considering other pivotal areas, e.g. leadership, sustainability, and culture.

As an additional consideration, ethics has been added into the HR analysis, because every HR function has the potential to experience ethical dilemmas. Human Resources professionals are expected to act within a strong ethical environment while simultaneously setting the stage for ethical behavior within organizations (Society for Human Resource Management, 2021). This case provides reinforcement for that expectation by providing exercises that are both timely and meaningful.

With this in mind, culture as an integral component of internal operations has been included in this case. In particular, the importance of understanding both internal and external culture are emphasized by placing this case in the Deep South. Students will be challenged to deal with regional culture as a fact of doing business with this company.

Although 61% of those employed in the accommodation and food services industry work for small businesses, there is a deficit of information and literature about the operations of small businesses relative to the information available about large, publically traded businesses. The Small Business Administration Office of Advocacy (2019) reports a total of 908,281 small businesses registered while Wall Street Journal (Thomas, 2017) reports only 3,671 companies listed on stock exchanges in the U.S.

The Value of Case Studies for Learning

Case studies provide important opportunities for students. Their portrayal of actual events, that is, evidence, is often business students' first step into the world of industry, and this is especially true in the leadership field, a field that is both technical and specialized with little

room for practice sessions. Leaders are often new to the principles of human resources and have few opportunities to practice their work in a live environment.

Since the early 20th century, business cases have become a staple of business education. Some scholars believe that business cases are becoming ever more important as global business adds layers of complexity to everyday business decisions. Citing the financial crisis of 2008 as an indicator for leaders to think more exploratively than categorically, Gonglewski and Helm (2010) emphasize that the global arena is less predictable and requires more innovative decision-making. They tout business cases as an excellent tool for teaching to these ever-changing standards. Their faculty and students, alike, found business cases to be extremely helpful in practicing "real life" decision making. Further, they found business cases to be an important addition to foreign languages classes where collaboration resulted in enthusiasm for the content.

For the educator, business cases provide opportunities to declare and measure student learning outcomes with respect to developing skill sets and demonstrating competencies. Further, business cases provide a framework to guide students in their analysis and decision-making at the organizational level. Through the use of well-developed business cases, students are able to practice decision-making on real, rather than idealized, business situations.

BUSINESS CASE: JOELOUIE'S RESTAURANTS

JoeLouie's is a family-owned, family-operated, family-style restaurant chain doing business in the Deep South (DS). They do not sell alcoholic products. They are organized as a privately held corporation. The owners, Joseph Campana and Louis Campana are brothers and co-owners of the 30 year old business. Both brothers are 60+ years old and have settled into providing for a large extended family (30+ family members). Joe oversees the daily operations of the stores, constantly troubleshooting store problems as well as people problems within each store while Louis oversees the office staff and business end of the operations. Typically, Louis is not seen in the stores and is not part of store operations.

The organization has six stores and employs 300 people including office staff, service staff, kitchen staff, caterers with delivery staff, and managers. The chain serves three meals a day, so operating hours are 6:00 a.m. to 9:00 p.m. In its region, the organization is well known and respected for good food, strong food safety, and strong community ties.

Dylan is a 30something employee who is the General Manager (GM) of one JoeLouie's stores, a restaurant that serves hundreds of people each day. He is considered one of the more effective GM's within the organization as he oversees approximately 45-50 employees each day. In addition to providing take-out orders as well as dine-in services, JoeLouie's also provides catering services. Dylan's daily staff in this single restaurant includes the catering staff and delivery drivers who operate from a dedicated section of the kitchen. Dylan is an attractive, flirtatious, and charming man who works diligently to keep the store moving forward in the face of numerous daily challenges. He often greets well known customers with "Hey, Beautiful. How are you today?" and flirts with the staff as well as customers. But, today, Dylan is spending some time pondering his own actions, because he just terminated a mid-manager for sexual harassment. Further, this incident has triggered the new HR manager, a daughter of one partner, to initiate a "deep dive" investigation into operations. Joe and Louie readily agree, because the new HR Director is so emphatic about the need for change.

Sexual Harassment Incident

Frankie is a mid-20s manager who was recently promoted to a mid-manager position over two women who had longer tenure and more experience in the restaurant and field of hospitality. He's a family man with limited education and no management experience. He's known to yell in servers' faces when he gets distressed but tries to keep it friendly most of the time. He is not well liked or respected by a number of people at the restaurant, because of his arrogance and hard headedness.

A young female server, Tina, reported Frankie to Dylan for sexual harassment after Frankie gave her a friendly pat and tickle on her butt. While Tina was pretty sure her complaint would be overlooked, she felt the need to report to create a record of the incident. As she expected, Dylan said he would look into it, but never did any followup with either Tina or Frankie to indicate his attention to the problem.

Then, it happened again, and Tina asked other female staffers about any problems they might have had with Frankie. The women began comparing incidents around Frankie's behavior. They discovered an ongoing and unaddressed pattern of harassing behaviors from Frankie with several women, including two who claimed to have reported his behavior to managers other than Dylan. Tina decided to report again, and once again, Dylan promised to look into the problem. However, this time, Tina's complaint was followed with complaints from three other women, all of whom reported the behaviors to the sexual harassment contacts for the company, all of whom are men. Frankie's employment was terminated, after the company was reminded by a female manager that three Black men had already been fired for lesser (no touch) harassment behaviors.

One of the sexual harassment contacts is the Director of Operations, John, and he recently joined others for Harrassment Prevention training; shortly thereafter, John was making fun of women who made sexual harassment complaints to two of the female mid-managers. In the wake of Frankie's termination, Joe and Louie decided to investigate other complaints that had previously been "looked into" but never fully addressed, as identified by the new HR manager. They found a number of complaints about the impact of 1) nepotism and 2) sexual harassment, as well as ongoing 3) sex discrimination, 4) race discrimination, and 5) food theft. The new Human Resources Director, a daughter of a co-owner with a degree in HR, was hired to provide sexual harassment training as her first HR initiative. The following sections detail the findings of the investigation.

Human Resources - JoeLouie's Workforce

Staff is composed of groups of employees that include service workers (wait staff and car hops), kitchen workers (cooks and bussers), and caterers (subset of the kitchen, but working independently), as well as office support workers that include an accountant for the company, an information technology worker for the company to keep the website and email working, an office assistant for the company, one staff worker for the company, and one newly hired Human Resources worker for the company. The HR position was filled following Frankie's termination.

Family members employed at JoeLouie's Restaurants include three daughters, two sons, a number of cousins, two wives, and two long time friends. One employee has been with Joe and Louie since the first day of business. Several other long time employees work in the stores. The workforce for the company is diverse in terms of race, age, gender, Christion religion denominations, and sexual orientation. Neither ethnicity nor military experience are well

represented, in spite of availability within the local population. Asians, Hispanics, and Muslims have not been hired.

Job analysis and job descriptions are informal, with employees simply doing what they are told or shown to do. "Task creep" is reported by employees at all levels, as Joe struggles to keep the restaurants fully staffed in the face of 300% turnover. As employees leave, other employees are tasked with additional work and longer hours to keep the stores' productivity stable.

While several members of the workforce have completed college educations, the vast majority of employees have a high school education or less, because college educated employees tend to leave. JoeLouie's is often a way for someone to work his/her way through school. Most staff members have completed high school or GED requirements, but some have not.

JoeLouie's operates a program for the differently abled, employing people who might otherwise be difficult to place. Every store has at least one differently abled employee, often tasked as dishwashers or bussers, and they are less likely to experience task creep, although they are not free of it. The wages for differently abled employees are commensurate with those of any employee in a same/similar position.

During their deep dive into complaints, Joe and Louie working with the HR director discovered that approximately 50% of their full time staff is one flat tire away from bankruptcy. Many employees are near poverty even when working overtime, such that even minor health problems or car repairs can jeopardize a family's housing and food stability. While concerned for the stability of JoeLouie's operations, Joseph and Louis are not inclined to provide raises, an ongoing issue for many employees. Promised increases seldom come to fruition, and the Campana brothers acknowledge that opportunities to change positions for more opportunity or income are sparse in the Deep South, relative to other parts of the country. They are less subject to "walkouts", because there is no place to go except to pack up and leave the state. Leaving is seldom an option, because it requires money to move, and many of the employees have seldom been out of their state, much less the region.

Currently, JoeLouie's stores are all understaffed as the company tries to control costs. As a consequence, employees are over worked and struggling to keep up with demand. Frequent reprimands come from multiple sources, even when employees take federally mandated breaks. Recently, during a rant, John told two managers to "get off your ******! *****! and get back to your ******! jobs!", (Anonymous by request, 2020) even though the jobs were covered and the managers were taking mandated breaks while working 12 hour shifts. *Note*: Use of profanity is a common occurrence in this industry.

Two recurring reasons for termination from the organization include food theft and drug use/sales on site. Kitchens are monitored by cameras, and employees are aware of the cameras. Cameras are also found throughout the rest of each department in each restaurant, including walk-in coolers, dining and prep areas, and dish room. Large food thefts are rare, because the storage areas are also monitored, but employees will try to get by with an order of fries or a burger. At JoeLouie's, stealing a hamburger is grounds for immediate termination. Buying a burger at half price and eating it on the clock is grounds for termination. Buying it at half price and clocking out and then eating it is "the way we do things around here."

All upper management consists of men. Women do not appear in the management hierarchy until mid-managers are needed. Many of the front of the house managers (front line managers) are women, relative to the number of men at the same level. Hearsay from someone

with access to the office has it that John has specifically said that women will never be general managers for JoeLouie's, because they are just too weak.

Compensation and Benefits

Wage scales are lower in the Deep South, relative to the rest of the country. Compensation for wait staff is $2.13/hr plus tips. On average, tipping behaviors are poor in this region and particularly poor in smaller markets. Compensation for other positions begins at $7.25/hr. Drivers are compensated at $7.25/hr + tips and mileage, because they use their personal cars. Joe and Louie recognize the problems inherent in low pay and poor benefits, but defend their compensation plan as one way to keep costs low, so families can afford to eat out. Further, Joe and Louie recognize that many of their employees "just need a job" and have few choices about where they can work in this external environment. *Note*: Many of the wait staff have regular customers who request to be seated in the service sections served by a particular wait staffer. These customers are usually long-term regulars with whom the staffer has a comfortable relationship and who usually tip better than average. Often, tips will improve by 10-25% with a favored server. Anecdotal information indicates that these regulars get quite upset when they cannot have the server of choice, and tipping is reduced to the alternative staffer. Sometimes, regulars will actually follow a favorite waiter/waitress to a new position at another restaurant. As a consequence, regulars are an important part of compensation for many wait staff members.

Perquisites for the JoeLouie's chain include 50% discount on food for servers and kitchen workers while on the clock, and 100% food discount for managers while working. Employees accrue five, 8 hour days of paid time off after one year of averaging 35 hours/week of employment. Servers are compensated at the rate of $7.25/hr for their paid time off, often causing servers to work extra hours to make up for wages lost from taking paid time off, because no consideration is given to the impact of lost tips. Servers often take the vacation pay without taking the vacation to avoid losing money for taking time off.

Toward improving compensation processes, the JoeLouie's company mandated that all paychecks be direct deposited, even for employees who do not have bank accounts. All employees are encouraged to open accounts at a neighborhood bank, so they can receive their wages. If the employee cannot open an account, the payroll vendor issues a paid debit card. This stopped employees from freely stopping by a restaurant at any time to pick up a paycheck from a manager. This also stopped employees from complaining to managers when paychecks were incorrect. Now, if their compensation is problematic, employees are directed to speak with the accountant at the home office.

Insurance plans have been available for employees since the advent of the Affordable Care Act (ACA or Obamacare), but the company does not share any of the cost for providing insurance to the vast majority of employees. With premiums of $300-600/month, most employees simply cannot afford insurance. There is no formal employee wellbeing program toward improving engagement within the workforce (Witters, 2020).

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Recruiting and retention

Most of JoeLouie's recruiting is accomplished by word of mouth and through personnel connections. Servers are particularly prone to turnover, so there is a constant call for more people. When those outlets do not meet needs, online recruiters are used. As noted earlier, this company suffers from 300% turnover each year, a problem that creates a relentless need for training and development of front line employees.

Selection

Employee selection is often based on working knowledge of restaurants and/or references from current employees. Even people with little or no experience are hired, because keeping a fully staffed store is important to increasing productivity. New hires may include someone who needs a second chance or someone who is still in high school and needs a part-time job. Selection is usually made by General Managers or the Director of Operations, but sometimes, selection is simply a mandate from Joe or Louie with little consideration for the background of the new employee.

Performance and Evaluation

Because turnover is frequent, performance evaluations are constant. Someone is always working through probation or attaining a milestone anniversary. However, like many other companies in this industry, this organization has no formal evaluation plan for each employee, and managers have virtually no evaluation training, including Joseph and Louis. Their evaluation plan was found online and has been used many years without any updates to reflect changes within the organization. As noted elsewhere, there are no formal job descriptions or specific expectations set for any task. There is not a formal employee handbook to educate employees about organizational policies. This company uses the "do as you are told" criterion to assess employees and does not include formal records. Promotions are often knee-jerk reactions to everyday problems, thus perpetuating a culture of crisis management. Raises are often rare and insignificant ($.25/hr) and upward mobility is limited. The new HR manager understands the problems involved with this approach but has little time to address the issue immediately.

Training

Most servers and kitchen staff have experience within the industry, so training is often short. Although one mid-manager developed and implemented a full training program, Joe and Louie have been reticent to use the plan, because it requires employees to be trained on the company's time for several days. While used only once at a single store, results following the training plan implementation included reduced customer complaints with fewer meals "comped" because of errors, higher tips for wait staff, and fewer employee complaints. However, the plan was not reinforced as new people were employed, so results were short-lived.

Eventually, JoeLouie's hired an outside consulting firm to develop another training plan, quite similar in form and content to the first. All wait staff were trained using the second system, but again, emphasis on training waned after the consultant left and the organization returned to daily operations.

During onboarding, every employee is specifically informed that JoeLouie's has zero tolerance for sexual harassment. All sexual harassment complaints must be reported to one of three men, Joseph, Louis, or John, the Director of Operations. John works directly with Joseph to keep all the stores moving forward. JoeLouie's employees also regularly retrain through the ServSafe (discussed later) program to assure they stay focused on food safety.

Safety and Health

Safety and health procedures for employees are limited. Skid proof shoes for working in the store cannot be mandated to employees, because the company refuses to provide the shoes or to reimburse for the shoes; instead, the store suggests that all employees wear skid proof shoes. Small burns are common in the kitchen, and often, overlooked, because they are so common and employees are "just used to them". Managers remind some with, "You knew what you were in for when you took the job." Because paid time off is not available to newer employees, new employees often work while sick, because they cannot afford to be away from work for even a single day. Employees have not been routinely tested for fever until COVID-19 became a problem, an industry standard for running a restaurant. Primary care clinics are often used in cases of severe sickness, e.g. pneumonia and severe burns.

Leadership - Vision and Strategy

Strategy is created by male family members only. Strategy is held closely within the family and is seldom/never discussed with employees. There is no obvious mission or direction for either employees or customers.

Nonetheless, everyone learns that food safety is of paramount importance for this organization. Food safety measures are taken regularly throughout each work day as a required task for a manager. Most employees have completed ServSafe training, an extensive program owned and operated by the National Restaurant Association:

> "As the premier provider of educational resources, materials and programs to help attract and develop a strong industry workforce, ServSafe has been the restaurant industry's leading association since 1919 and, together with the National Restaurant Association Education Foundation, our goal is to lead America's restaurant industry into a new era of prosperity, prominence, & participation, enhancing the quality of life for all we serve." (Retrieved from https://www.servsafe.com/About-Us, Sept. 12, 2020)

ServSafe has trained 12.8 million food service professionals for 960,000 locations that have generated $604 Billion in sales. (Ibid.)

All of JoeLouie's restaurants are 4-5 hours from a coastal region that is likely to be hit with hurricanes. As a consequence, hurricanes are, sporadically, big business for this family restaurant system as forced evacuations drive people inland and away from coastal areas.

Similarly, FEMA and volunteer service workers rely on this company during times of inclement weather because of the long work hours, food preparation that travels well, and the delivery services for odd hours and odd locations.

Each store is refurbished and redesigned after 20 years in service. The design plan is decided for the entire organization and adapted to the needs of each store's location. The stores are not freestanding; instead, they are located in shopping strips that have easy access and plenty of parking close to busy streets.

This company has a well-developed website that enables customers to choose store information, menu information, and ordering information as well as provides nutrition information. This company also has house accounts for regular customers whereby food is charged to the account, and the account is paid in full once a month.

Community Involvement

In their efforts to live the best Christian lives they can, Joe and Louie have dedicated themselves to saying, "Yes" to charitable requests as frequently as possible. Whether asking for a sandwich for one or 150, they do their "dead level best" to give back to the community. JoeLouie's is a well-known supporter of many regular, charitable, community events, often providing food at cost, or, sometimes, free.

JoeLouie's provide free meals to support community fund-raising events. Employees consider these hours as their own community service hours. If anyone hears of someone in dire need, they provide food to the homeless. If someone is sick, and especially a devoted employee, they will send a warm meal home with the employee. Stores are closed on Sundays to allow all employees to participate in worship services.

As their city required heightened response to COVID-19, employees volunteered to work after hours as the people in the community ordered food gifts to be sent to the late night workers at area hospitals. Food preparation often continued hours after closing time and deliveries were made directly into hospitals in the middle of the night to serve third shift employees. Delivery people, often women, were met by security personnel at the hospitals to walk them into the buildings and around the floors. Security personnel walked the delivery staff back to their cars, even though parking lots are fully lighted.

COVID-19 Response

Like all similar organizations in the region, JoeLouie's faced a mandated dining room closure for 12 weeks. During that time, the family owners as well as managers strategized ideas about how to keep the business profitable while also protecting employees.

Working to remain compliant with state mandates about masking, social distancing, and closure of onsite dining, JoeLouie's used a number of new processes to assure safety for both employees and customers:
1) Every employee was temperature checked before being allowed into a building, was required to wear a face mask or shield, was required to wear gloves for direct food preparation, was routinely reminded to wash hands, and was taught to work while socially distancing.
2) Initially, many employees were furloughed while trusted employees continued to work exceptionally long hours to fulfill the thousands of orders for takeout food. Later, employees

were rehired to meet the demands for accepting grant monies from the federal government. When the grant monies were spent, employees were once again furloughed.

3) JoeLouie's restaurants devised a system of carhops and drive up service assistants that allowed customers to remain in their vehicles while ordering or picking up food that was sealed in the kitchen. One notable approach to social distancing was accepting orders and delivering food to the rider's side of the vehicle, if there was no rider. All employees were required to wear full personal protection equipment (PPE).

4) Delivery drivers were, similarly, taught to deliver in a "no touch" environment.

5) After 12 weeks, the restaurants closed off sections that could not be retrofitted with plexi dividers between booths/tables or spaced tables to be appropriately distanced. Dining rooms remain at lower than pre-COVID capacity.

6) Recruiting has moved largely to online to make it as touch free and socially distanced as possible.

7) Employees churned through different positions or different departments or both to allow as many healthy employees to remain employed as possible.

8) If anybody was sent home to be tested for COVID-19, that employee was quarantined for 14 days before being allowed to return to work. After using all these new processes for months, only one employee tested positive for COVID-19, and that result was a false positive. To date, only one employee has contracted COVID-19.

9) Later in the pandemic, bottles of hand sanitizer were placed on each table in the dining room while seating remains at 50% of capacity.

Joe Louie's Organizational Culture (Adapted from Johnson and Scholes, 2005)

Control Systems

Control systems are extensive and enacted throughout each work day, to include: dress code for wait staff and managers, compensation and benefits governed by a time clock, rudimentary training for new positions, performance evaluation for some employees, strong inventory controls that make for efficient inventory governance, budgets that include labor hour controls, disciplinary policies, financial controls through cash flow management and common financial statements, employee handbooks, and feedback, just to name some. Controls from food temperature to speed of external delivery to how to close the cash registers at the end of the day are consistently used through daily operations.

The strategic plan projects growth in profit expectations rather than growth in the number of stores. The brothers do not desire more stores. Instead, they prefer to drive efficiencies in each store to improve overall profit. There is no formal marketing budget or marketing plan nor is there a formal communication plan. Company policies include no fraternization among employees, zero tolerance for sexual harassment or hostile environment, and zero tolerance for drug use or sales on the property. Nonetheless, fraternization, sexual harassment, and drug use continue to plague this company as well as this industry.

Routines and Rituals

Stores open and close at the same time, six days a week, and all stores are closed on Sundays. The opening crew arrives at 4:00 a.m. to a clean store that is ready for breakfast preparation to begin. Stores close at 9:00 p.m. and are cleaned by all hourly staff and managers. A floor and sanitation crew comes in each Sunday and sterilizes all "high touch areas." As noted earlier, food inventories are checked for temperature six times a day. Date codes are checked daily. Routine implementation of controls are focused on keeping daily operations "out of the weeds" and forging ahead to make profit and feed customers.

Passive aggressive reprimands are issued by Joe and other family members frequently when production slows or standards are not met. However, John has frequently used curse words to and around employees as he tantrums through a crisis. Women who disagree with him or who may be less than "pretty" have been called "troglodyte w****s as an off color joke to other employees, often forcing other men to feel complicit in his bad behavior. Little has been done to effect change in John's behavior, "...because he's 63, and he's not likely to change." (Anonymous by request, 2020)

Both of the Campana brothers own guns, but do not carry weapons into their stores. However, several of their employees as well as customers routinely carry weapons into the stores, some as "open carry."

Employees are not allowed to clock into work until they are prepared to work immediately. "Riding the clock" is sure to draw a reprimand from a manager, because labor hours are closely monitored.

The home office and all stores are closed for all major Christian as well as national holidays, e.g. Christmas, Thanksgiving, July 4, Easter, Labor Day, and other national holidays. Hourly employees are not paid for these days off. The community fund-raising events for March of Dimes requires substantial planning and are often happily anticipated events for everyone at JoeLouie's. All meetings are opened with an invitation to prayer.

Stories (examples of stories found throughout each restaurant)

Joseph is not afraid of work. This hard working soul is often found wearing an apron and moving rapidly through a restaurant to seat guests, to discuss problems, to prepare food, to meet vendors, and to complete any of a bajillion other tasks that arise within the course of a day. He is congenial and well-liked by most in the restaurants. Nonetheless, he strikes fears in the hearts of everyone when he is displeased.

Profits continue to grow, even in the face of a pandemic and other environmental challenges. JoeLouie's restaurants have shown remarkable resilience in the face of challenging times created by a confluence of factors including, but not limited to, a pandemic, an election year, a volatile stock market, increasing costs of doing business, civil unrest throughout the nation, and increasing reliance on technology to enhance or improve business. JoeLouie's is the go-to caterer for casual lunches or dinners in their market, and keep the catering kitchen and staff working overtime to fill all orders. Profits are never shared with employees, and bonuses are nominal. The Campana brothers believe that employees should be really glad to have such a nice place to work. Restaurants are clean, workers like each other, and business is booming.

At the same time, the grapevine in each restaurant is full of stories about family members or friends who have received positions, along with the associated pay increases, that are typical

within this organization. Nepotism that is not in the best interest of the company haunts the non-family members of the staff. Recently, a General Manager at one store hired a member of his own family as an assistent GM. The pay was more than others in similar positions although the Assistant has limited experience in the field. This position was never posted publicly, and this selection was made in spite of JoeLouie's having two women with more experience, more formal education, and more tenure with the company who expected to be moved up.

Similar problems arise from fraternization among employees. Such relationships are out of compliance with JoeLouie's policy of zero fraternization and create morale problems within every store. Nonetheless, romantic relationships are part of everyday issues faced by all employees.

When women servers are groped by customers, nothing is said to the customers, because no one wants to offend a customer. Being groped is just one of the risks that comes from working around "good ole boys" who really like the girlies. The women are expected to handle the problem for themselves in a manner that is professional and non-confrontational. There is no special training for any of the women.

Employees are commonly shifted from one store to another to fulfill staffing needs. As a consequence, many of the stories within each store become organizational stories through the internal churn of employees between stores. To retain a position, an employee may be required to drive 100 miles round trip. While bonus pay is provided for those who drive extended distances, that bonus does not rise to the state mandated expense pay for travel within state.

Symbols

Everyone in the stores except Joseph and Louis wear JoeLouie's branded shirts. Wait staff wear polo shirts while managers wear button down shirts. In a perfect world, everyone wears black slacks (managers have a choice), black shoes are suggested for everyone, and shirt tails are always tucked in, except in the kitchen and catering. Tattoos are not allowed and must be covered in a manner that is in line with work wear, so they are not evident during working hours.

Some delivery vehicles are branded with logos, but, some delivery vehicles are personal cars and are not branded. The logo is well recognized within the community. All stores are designed in similar styles and colors, whereby customers see desserts as soon as they walk in and are greeted and seated by a manager. There is a Christian cross over most doors, so each store has multiple Christian crosses and other religious iconography, something that is well tolerated because of the location in the Deep South. The single office space in each restaurant is shared by all managers, with the expectation that others can wait if someone is using the office for business purposes. Managers routinely move in and out of the office while others are working, including handling cash drawers.

Access to Joseph and General Managers (GM) is open, but not frequently used, by anyone lower than a mid-manager. Family members are put into positions of power, whether qualified or not. With that said, some family members show expert leadership and knowledge about the internal operations of each store. Others are no more likely to be ready for leadership than the average store employee.

Power and politics

As noted earlier, the Campana Brothers exercise full control over the entire operation. All strategic decisions are made by the brothers, seldom with input from anyone lower than a General Manager. Family members are put into positions of power, whether qualified or not. Thus far, no succession plan has been created. Because both brothers have children and grandchildren, succession is assumed but not formalized.

On average, employees from mid-managers down have little power or opportunity to bring about substantive change within this organization. Information moves informally from wait staff to front of the house managers to mid-managers, often as rumors. Frankie was moved into a management position after he passed along a rumor to Dylan that one of the women who was in line for the assistant GM position was leaving the organization. Without asking either of the women about the rumor, Dylan promoted Frankie into the open management position. Such actions are not unusual with the JoeLouie's organization. Too often, rumors are as good as gospel.

Organizational structure

The structure in this organization is relatively flat and open with few layers: 1) Campana Brothers, 2) Managers, 3) Mid-managers, and 4) Everybody Else. Virtually everyone is on a first name basis from bottom to top. Although organized hierarchically, there is an informal matrix structure that arises through daily operations. Often, upper managers overstep each other in such a way that any employee may be given different tasks all at once. Employees quietly talk about trying to please 3 managers with 3 different tasks given within 5 minutes of each other. Further, when employees indicate to a manager they have already been tasked with other work, the managers are likely to express anger and frustration, but continue to insist that the tasks be completed.

Paradigm

This organization is owned and operated by a clan who grant little of the authority or power necessary to run the organization to others. Change is slow, particularly when Joseph or Louis are on site. When Joseph is in the store, both John and Dylan take a back seat to the mandates coming from Joseph. The company exists to provide community members, and especially families, a safe and affordable place to have dinner out. Employees are a means to an end.

External Environment - Eccentricities of Deep South Culture

Geographically, the Deep South includes the states of Alabama, Arkansas, Florida, Georgia, Louisiana, North Carolina, South Carolina, Tennessee, and Texas, all former slave states that fought for the Confederacy during the Civil War. Regional cultures are notably different within the United States, and the Deep South is certainly unique in its own ways.

Newcomers to this region can expect men to hold the doors for all women as well as other men, and to do otherwise is considered exceptionally rude, making the offender subject to

condescension. Routinely, doors are opened for elders and ladies, smiling is important, and titles, e.g. Miss Tammy or Mr. Joe are commonly used by everyone, including elders.

Drivers are expected to return waves from other drivers as they are driving down country roads or through neighborhoods, even if one doesn't know the other person. Drivers often drive below the speed limit, and might block others to keep them from speeding. There is a large population of older drivers in the DS, and no one fusses at them if they are the ones blocking traffic. JoeLouie's drivers are often waylaid by customers who want to visit.

Church attendance is routine for approximately 50% of the population, with many people attending church at least twice a week. Christians pray freely at both public and private meetings as well as group dinners and always include everyone sitting at the table. Prayer rings take place before athletic events, on university campuses before exams, or any place where Divinity can be called upon to smile favorably on the wellbeing of participants, if not specifically for the results. A newcomer can expect Southerners to ask if the newcomer has a "church home" and to invite the newcomer to visit their church. Services start at 11:00, except during football season. Some churches begin service at 10:30 on Sunday morning during football season.

Many people are, or aspire to be, property owners, in spite of the added costs and responsibilities associated with property ownership. Paradoxically, home ownership by Blacks is higher in the South than the North. While Black home ownership in New York is only 31%, home ownership in Mississippi is 54%. In 2018, Black home ownership was just 24% in Minnesota where 77% of Whites owned their homes; at the same time, Black home ownership in Georgia was 47% where 63% of Whites owned homes (Wake, 2020; Suburban Stats.org, 2020)

Public transportation systems tend to be city buses or light rail systems, but neither is particularly well developed, relative to large cities in either northern or western states. As a consequence, cars, trucks, and motorcycles are the primary means of moving around the region. Many towns and cities are not pedestrian or bicycle-friendly. Parking is free or exceptionally inexpensive. Parking meters may cost as little as $.05 for 5-10 minutes, allowing people to dash indoors to complete a quick transaction. Often, the DS does not require parking fees on weekends. Meter maids are considered hostiles, and a parking ticket is likely to set a vehicle owner "back" (cost) $10.00 in some places.

Weather is important to the comfortable lifestyle lived by many in this region. Summer brings days that are long, sunny, hot, humid, and air conditioned. All businesses and virtually all homes and rental properties are air conditioned. There is limited snow and ice south of the lower Tennessee border. From an environmental perspective, buildings and roads last longer, because winters are mild and less destructive. Spot construction is rarer than in other parts of the country. Every building is still the same after 20 years, because they don't deteriorate as badly in the mild winters. People, including school children, stay home during inclement weather, including when there is a high probability of ice or snow. Roads are well maintained, relative to other parts of the country that experience heavier winters, and facilitate heavy travel from ports and coastal recreational areas throughout the year. People work outdoors throughout the year or until the temperature drops below 40 Fahrenheit. Barbeque is spectacular, all day, every day, with a plethora of choices facing consumers. Families routinely barbeque dinner or order in to avoid making the house hot from cooking during hot weather.

Hurricane is a weather condition that is unique to the DS states because of frequency. At this time, three hurricanes have hit the gulf coast within three weeks with five more storms sitting in the Atlantic Basin showing the possibility of becoming hurricanes. Forced closures and evacuations are common across the Gulf of Mexico states during hurricane season, roughly June

1 through November. Hurricanes are big business for many organizations, including home improvement stores, insurance companies, hotels, and restaurants. Hundreds of volunteers rush to the damaged areas to help with rescue attempts, and every volunteer requires housing and food.

Human interaction often includes frequent hugs, honks, handshakes, kisses, holding babies, lunches, dinners, communal prayer, and all manner of togetherness. Human interaction is less reserved than in other parts of the country. There is a strong focus on the village rather than the individual, although individualism is applauded, if it fits within social norms. One of the strongest social norms is that for Effort. People are expected to put effort into improving their own lives, and when they do, they are frequently rewarded with help from others. Conversely, people who are *perceived* as lazy or less motivated, either physically or emotionally, will not fit well within much of this region. People in the DS want to witness one's effort, and without visible confirmation that one is making a concerted effort to do "right", one is not likely to garner interest from anyone. Individualism without effort is often ostracized as selfish and less than true Christian behavior. Effort begets effort in the Deep South.

Socially conservative, the Deep South tends to have a tighter sense of community, particularly in smaller markets. There is a strong focus on giving to help others, even if "others" are not known. There is a generosity of spirit that is hard to find in other regions of the country, if one puts forth effort. That generosity does not always extend to the government. Government initiatives, e.g. collecting Census Data, is less likely to be as successful in this region as in other regions. All DS states had lower overall Census participation in spite of marketing and participation efforts to have people answer a few questions. (United States Census 2020, Sept. 23, 2020)

Gun ownership is prevalent, with all but one of the DS states placing in the upper half of gun ownership by state. At 28.7%, North Carolina has the fewest gun owners while Arkansas has the most gun owners with 57.9% of the population owning a gun. Ownership is measured as a percentage of population. (World Population Review, 2020). In the DS, concealed weapons are common, often as boot guns, purse guns, or knives. Women are more likely to own just handguns, but recent anecdotal evidence suggests more women in the DS region are expanding their holdings to include coach guns and some rifles. While there is prolific wildlife to foster hunting in this region, the overwhelming reason given for having guns is protection from humans. Nationwide, a notable percentage of women as well as men both keep at least one weapon loaded and unlocked. (Wolfson, Azrael, & Miller, 2020)

There are no union states in the Deep South. All states are Right to Work (RTW) states, whereby state laws prohibit forcing employees into union membership as a condition of work. Although state laws are constantly changing, unions and their benefits are not likely to be legislated into the DS. As a consequence, wages on average are lower, because coalitions have not been able to bargain for higher wages. RTW states have significantly higher subpopulations of Blacks and Hispanics than non-RTW states. (Gould and Kimball, 2015) Recently, there have been moves to unionize Amazon sites, but thus far, they have not been successful.

Poverty

One of the well documented social issues of the DS is poverty. While the poverty rate in the United States averages 11.8%, the average poverty rate in DS states is 17.5%. In the U.S., women are much more likely than men to suffer poverty, and that is especially true of women in

the DS. See Figure 1. On average, women throughout the United States are more likely to be povertized than men, regardless of age, marital status, or race. Having children under the age of 18 in the home is especially likely to contribute to poverty among women. (Glassman, 2020)

As indicated in Table 1 (Appendix), a mother with two children who earns $7.25/hr ($14,500/yr) earns well below the poverty standard of $21,720. That mother will require additional help simply to feed and house the family even though she is fully employed. By holding wages to the lowest possible standard, the restaurant industry drives its own problems with employee reliability.

Labor pool

A common problem found in the labor pool for the restaurant industry is the prevalence of drug use among employees, both during work time as well as free time. As seen in Figure 1 (Appendix), the accommodations and food services industry had the highest past year substance abuse as indicated by data for 2008 and 2012 on the National Survey on Drug Use and Health (NSDUH). Substance abuse for the graph below includes alcohol and illicit drug use.

Another feature of the food services industry that impacts the labor pool across the region is poor compensation. As noted earlier, wages in the DS are somewhat lower than the rest of the country. This is especially true for the food services industry, where a manager may earn as little as $10-12/hr with limited chances for upward mobility. Such poor compensation drives its own set of employee problems that feed mental health problems, reliance on welfare, and supplementary activities that drive poor outcomes for employees as companies tacitly collude to keep wages low. As indicated in Table 2 (appendix), median pay in the United States for Food and Beverage Service workers is $11.06/hour or $23,000/year for employees for whom there is no formal education credential and routinely short on-the-job training.

Finally, women in the DS labor pool face challenges of constrained inclusion, justice, and security, with seven of the DS states falling in the bottom 20% of states where it is more difficult to be a woman. As seen in Figure 2 (Appendix), the DS states fulfill the lowest ranks of the country with Louisiana placing 50th in the nation. Other positions by state are Mississippi at 49th, Arkansas at 48th, Alabama at 47th, Tennessee at 44th, South Carolina at 43rd, and Texas at 40th. None of the DS states scored at the national average or higher as good places for women to live and work. As seen in Figure 2 (Appendix), on average, women are less secure, have fewer opportunities, and have greater healthcare challenges than women in other parts of the U.S.

CONCLUSION

Dylan is worried that he has caused Frankie to lose his employment by being a poor role model and poor administrator. The recent investigation has alerted Dylan to the importance of knowing more about how to help the people in his organization, and he wonders if Joseph and Louis Campana are going to allow him to stay as he learns more.

Questions that need answers:

1. What strengths does this restaurant have that Joe and Louie can use to support change?
2. What weaknesses does this restaurant have that are barriers to change/improvement?
3. What are the external opportunities that apply to this industry?
4. What are the external threats that apply to this industry?

5. What are the high priority changes needed in this restaurant?
6. What are your recommendations to the Campana Brothers about leader development?
7. What are your recommendations to the Campana Brothers about organizational development?
8. What are your recommendations to the Campana Brothers about controls for each of the following problem areas?
    a. Nepotism
    b. Sexual Harassment
    c. Sex Discrimination
    d. Race Discrimination
    e. Food theft
9. What additional advice would you give the Campana brothers about how to improve their organization for all stakeholders?
10. What is next for Dylan? How would you counsel the Campana brothers about actions for Dylan?

TEACHING NOTES

Student Learning Goals for this case:
1. Identify external opportunities and threats.
2. Identify internal strengths and weaknesses.
3. Discuss corporate social responsibility and ethics, as it applies to this set of facts.
4. Synthesize analysis-based information to create a base of knowledge toward supporting evidence-based management.
5. Integrate evidence-based solutions for corporate issues.

The tools below can stand alone or function as part of a larger analysis. Instructors can choose to use one, two, or all the analyses, because each was intended to be independent of other tools and exercises.

The tools below can easily be replicated by upper division or graduate business students and are designed to be shared. For the first HR analysis, let students work in teams to generate the first analysis. This engaging approach provides support to students while instructors are free to move from group to group toward listening and learning how students are working through material from case and course texts. After the completion of the first analysis, hold a class discussion to find where groups have commonalities and differences. Finally, use the discussion as a springboard into future analysis. This tool works well for any HR analysis.

Note: Often, when initially learning organizational analysis, students feel as if their judgment is insufficient or "less than" in some way. Please, spend considerable time getting students to trust their own judgment. The authors do this, primarily, by having them defend a response. They provide short explanations for clarity and to corroborate that the students understand how pieces fit together from an analytical point of view.

Human Resources Analysis

The table below is provided to help students internalize how to analyze human resources (HR) from a holistic perspective. Taking direction from Saleeby (1992), this approach empowers

HR professionals to use the organization's resources to work through many of the its current problems.

Every aspect of human resources has both strengths and weaknesses, and this case has been written to provide examples of both in context. Entries do not have to be balanced in terms of numbers. For example, students may find that three strengths in Strategic Management are offset by five weaknesses in Strategic Management. The goal here is to identify major issues as well as major resources.

Exercise 1.

As seen in Exercise 1 (Appendix), a table is used as a means of organizing information resulting from analysis. Have students include information into each cell, so they develop a well-balanced approach to human resource analysis. There is no support "cherry-picking" information, such that bias is invited into the analysis, because no HR system is either all good or all bad. As students enter information phrases into the table, have them write or verbally explain each entry. This table is designed to be shared by the instructor to students as an ancillary for the course.

Leadership Analysis

As seen in Exercise 2 (Appendix), a table is used to organize information from analysis. The table is provided to help students internalize how to analyze and assess leadership within an organization. Every aspect of leadership has both strengths and weaknesses, and this case has been written to provide examples of both in context. Have students include information into each cell, so they develop a well-balanced approach to leadership assessment. There is no support for "cherry-picking" information, such that bias is invited into the analysis, because no leader/leader system is either all good or all bad. This table is designed to be shared by the instructor to students as an ancillary for the course. This exercise is adapted from Baldridge Performance Excellence Program criteria (2021).

Exercise 2. Definitions for Current Leader/Leadership Analysis:

Visionary Leadership
1. Leads the organization in setting and owning organizational vision and values
2. Guides the creation of strategies, systems, and methods to ensure ongoing organizational success
3. Inspires the organization and partners to achieve high performance
4. Demonstrates authenticity, admitting to missteps and opportunities for improvement

Systems Perspective
1. Sets a systems perspective across the organization so that the organization and all its parts are viewed as a whole
2. Causes holistic thinking and cross-functional synthesis, alignment, and integration
3. Requires a focus on strategic direction and results to improve overall performance
4. Leads with recognition of a larger, interconnected ecosystem (partners, suppliers, customers, communities) in which the organization operates and has opportunities for innovation

Customer-Focused Excellence

1. Builds a customer-focused culture and integrates customer engagement and loyalty as a strategic concept
2. Creates a focus on anticipating changing and emerging customer and market requirements
3. Ensures differentiation from competitors through the development of innovative offerings and unique relationships

Valuing People
1. Builds and reinforces an organizational culture that focuses on meaningful work, engagement, accountability, development, and well-being of workforce members
2. Creates an organizational environment that is safe, trusting, and cooperative
3. Builds partnerships with internal and external people and stakeholder groups
4. Builds a culture of equity and inclusion that capitalizes on the diversity of the workforce, partners, and collaborators

Agility and Resilience
1. Develops a capacity for rapid change and for flexibility in operations
2. Anticipates and recovers from emergencies and other disruptions to protect and enhance organizational performance and key stakeholder and community well-being.
3. Leads and inspires the organization to manage risk and make transformational changes despite ever-shorter cycle times
4. Anticipates opportunities and threats and adapts strategy internally and through the organization's business ecosystem

Organizational Learning
1. Creates an empowered and cross-trained workforce that effectively develops and uses evolving organizational knowledge
2. Embeds systematic learning in the way the organization operates
3. Improves the organization through innovation and adoption of best practices

Focus on Success and Innovation
1. Creates a focus on short- and longer-term factors that affect the organization and its future marketplace success, including managing uncertainty and risk and adjusting to a changing technological and economic environment
2. Accomplishes strategic succession planning for leaders and workforce
3. Builds an environment where strategic opportunities are identified, and the   workforce is supported to take intelligent risks
4. Fosters collaborative thinking among people who do not normally work together, including members of the organization's business ecosystem

Management by Fact
1. Compels the organization to measure performance both inside the organization and in its competitive environment
2. Uses data and analysis in operational and strategic decision making.
3. Challenges the organization to extract larger meaning from data and information to support improvement and innovation

Societal Contributions
1. Acts as a role model for public responsibility and actions leading to societal well-being and benefit
2. Motivates the organization to excel beyond minimal compliance with laws and regulations

3. Drives environmental, social, and economic betterment of the community as a personal and organizational goal

Ethics and Transparency

1. Exhibits and requires highly ethical behavior in all organizational activities and interactions
2. Leads with transparency through open communication of clear and accurate information
3. Builds trust in the organization and its leaders

Delivering Value and Results

1. Leads the organization to achieve excellent performance results
2. Defines and drives the organization to exceed stakeholder requirements and achieve value for all stakeholders
3. Selects a composite of measures that include, financial, product and process, customer, workforce, leadership, strategy, and societal performance

Section retrieved from https://www.nist.gov/baldrige/self-assessing/improvement-tools/are-you-role-model-leader, May 27, 2021

Exercise 3.

As seen in Exercise 3 (Appendix), a table is used to organize information from analysis Exercise 3 is designed to reinforce relevant leader and management theory toward engaging students in real world application of theory/evidence driven decision making. Students complete the table by identifying theories and concepts from the case as required by the questions below.

1. Describe the styles of leadership demonstrated by management/leadership in the case.
2. Identify the culture in the organization and discuss 3-5 key areas of the culture.
3. Identify pros and cons of leadership in the organization.

Ethics

As seen in Exercise 4 (Appendix), a table is used to help students organize information from analysis. Exercise 4 is designed to reinforce relevant leader and management theory toward engaging students in real-world application of theory/evidence-driven decision making. Students complete the table by identifying theories and concepts from the case as required by the questions below.

Exercise 4.

1. Discuss two or three different approaches to ethics in this case. Select the one that appears to be most prominent and discuss why it is.
2. Describe at least two ethical issues in this organization based on the different ethical theories.
3. Is the organization ethical or unethical? Please explain.
4. What role does the Ethic of Care play in this organization?

Sustainability

As seen in Exercise 5 (Appendix), a table is used to help students organize information from analysis. Exercise 5 is designed to reinforce relevant ethics theory toward engaging students in real-world application of theory/evidence-driven decision making. Students complete the table by identifying theories and concepts from the case as required by the questions below.

Exercise 5.
1. Name sustainability efforts in this organization (as many as you can find). This can include but is not limited to areas of leadership and culture, ethics, and human resources.
2. Identify practices that are not sustainable (this can include but is not limited to leadership and culture, ethics, and human resources).
3. What does this business need to enhance sustainability? Please explain.

Organizational Culture Analysis

As seen in Exercise 6 (Appendix), a table is used to help students organize information from analysis. With an ever increasing focus on diversity and inclusion, organizational culture knowledge remains at the forefront of many, if not most, diversity and inclusion initiatives. However, many HR students have only a rudimentary understanding of culture/culture analysis. The tool is based on Johnson and Scholes's (2005) mapping of internal organizational culture. The table is provided to help students internalize how to analyze organizational culture. Every aspect of culture has both strengths and weaknesses, and this case has been written to provide examples of both in context.
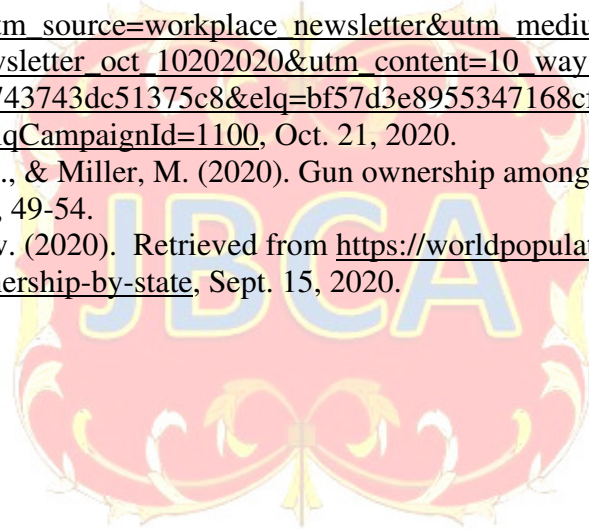
Exercise 6.
Have students include information from the case into each cell, so they develop a well balanced approach to cultural analysis. We do not support "cherry picking" information, such that bias is invited into the analysis, because no organization is either all good or all bad. This table is designed to be shared by the instructor to students as an ancillary for the course.

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Appendix

Table 1. 2020 Poverty Guidelines for the 48 Contiguous States and the District of Columbia*

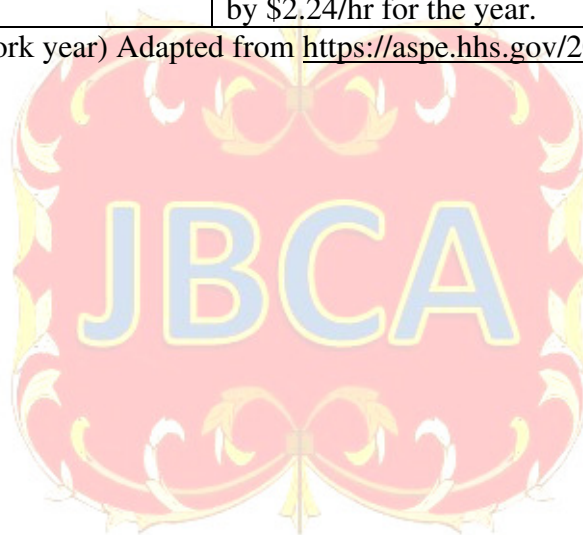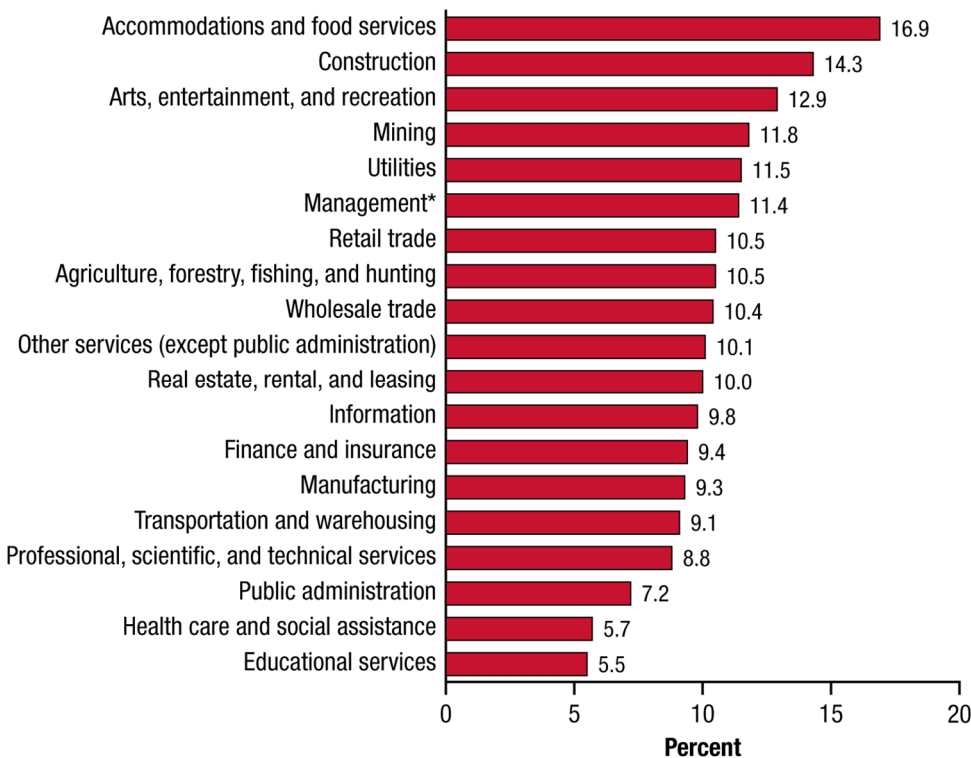| Persons in Family/Household	Poverty Guideline
1	$12,760 ($6.38/hr)
2	$17,240 ($8.62/hr)
3	$21,720 (10.86/hr)
4	$26,200 ($13.10/hr)
5	$30,680 ($15.34/hr)
6	$35,160 ($17.58/hr)
7	$39,640 ($19.82/hr)
8	$44,120 ($22.06/hr)
For families/households with more than 8 persons, add $4,480 for each additional person.	The ninth person and each additional requires that family income increase by $2.24/hr for the year.

(*Assumes 2,000 hour work year) Adapted from https://aspe.hhs.gov/2020-poverty-guidelines)

Figure 1. Past year substance use disorder among adults aged 18 to 64 employed full time, by industry category: combined 2008 to 2012*

Industry	Percent
Accommodations and food services	16.9
Construction	14.3
Arts, entertainment, and recreation	12.9
Mining	11.8
Utilities	11.5
Management*	11.4
Retail trade	10.5
Agriculture, forestry, fishing, and hunting	10.5
Wholesale trade	10.4
Other services (except public administration)	10.1
Real estate, rental, and leasing	10.0
Information	9.8
Finance and insurance	9.4
Manufacturing	9.3
Transportation and warehousing	9.1
Professional, scientific, and technical services	8.8
Public administration	7.2
Health care and social assistance	5.7
Educational services	5.5

*The full title of this category is "Management of companies and enterprises, administration, support, waste management, and remediation services." (Substances Abuse and Mental Health Services Administration (SAMHSA), 2020).
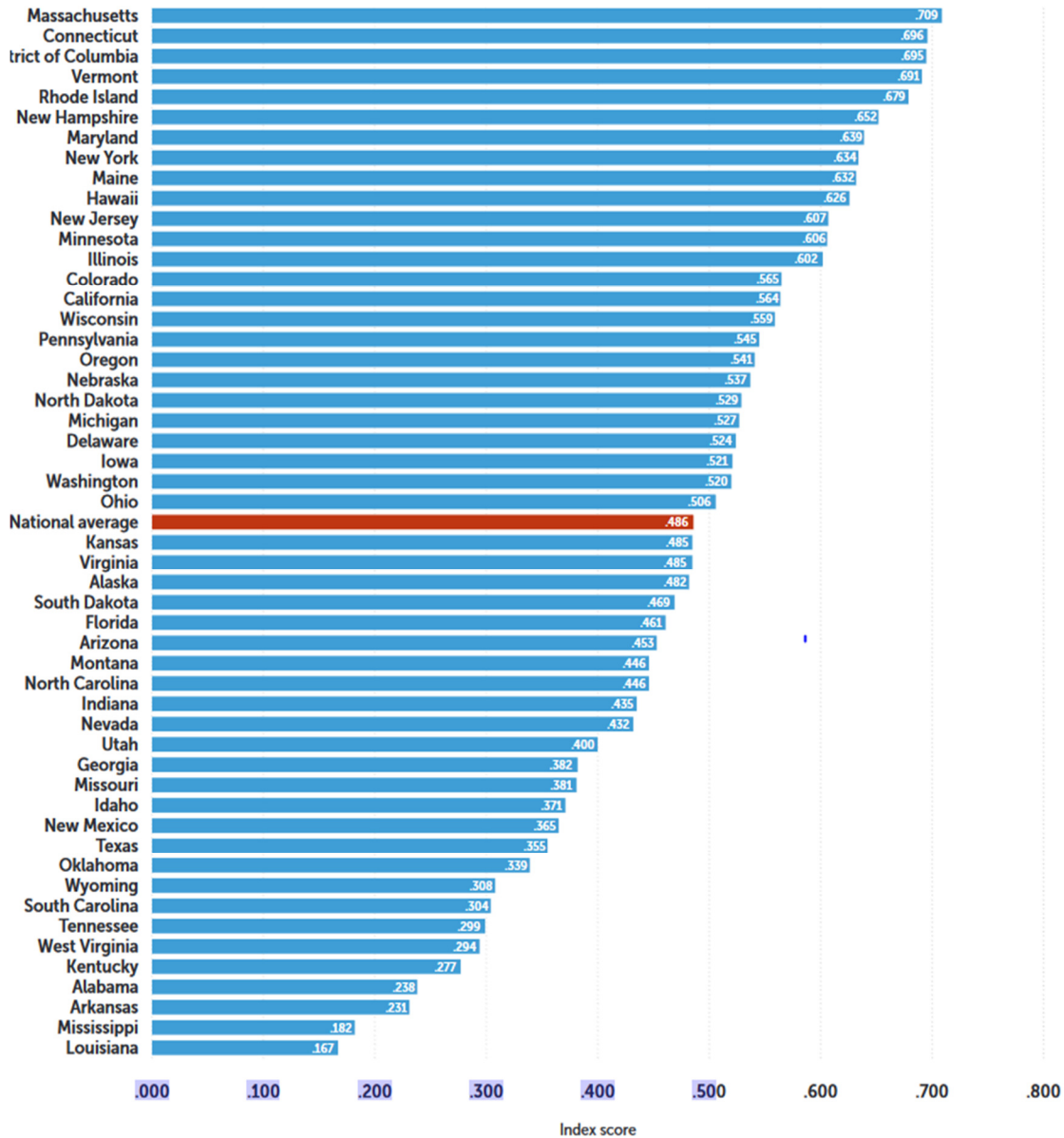Retrieved from https://www.samhsa.gov/data/sites/default/files/report_1959/ShortReport-1959.html, Sept. 23, 2020.

Table 2. Quick Facts: Food and Beverage Serving and Related Workers in the United States

2019 Median Pay	$23,000/year $11.06 per hour
Typical Entry-Level Education	No formal educational credential
Work Experience in a Related Occupation	None
On-the-job Training	Short-term on-the-job training
Number of Jobs, 2019	5,324,100
Job Outlook, 2019-29	10% (Much faster than average)
Employment Change, 2019-29	552,400

(Retrieved from https://www.bls.gov/ooh/food-preparation-and-serving/food-and-beverage-serving-and-related-workers.htm, September 4, 2020.)

Figure 2. State rankings on the United States Women, Peace, and Security Index, 2020 (Georgetown Institute for Women, Peace, and Security (GIWPS). (2020). The Best and Worst States to be a Woman.

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Exercise 1. Human Resources Analysis

Human Resources Dimension	Strengths	Opportunities for Improvement
Strategic Management	1. 2. 3.	1. 2. 3.
Staff	1. 2. 3.	1. 2. 3.
Compensation and Benefits		
Recruiting and Retention		
Selection		
Work force Development		
Occupational Health, Safety and Security		
Legal Compliance		
Ethics		

Exercise 2.
Current Leader/Leadership Analysis

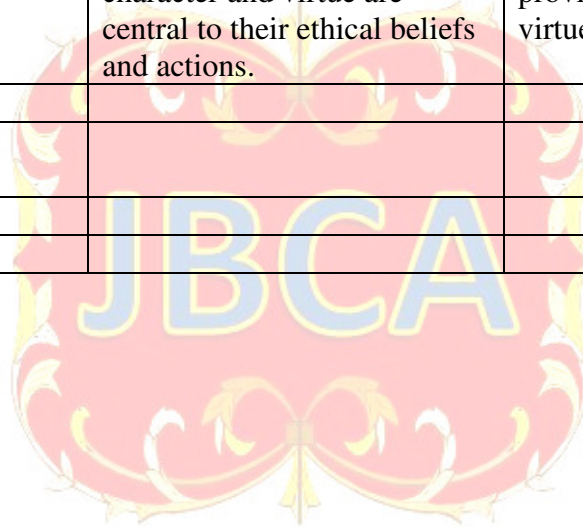| Leadership Dimension	Strengths	Opportunities for Improvement
Visionary Leadership		
Systems Perspective		
Customer-Focused Excellence		
Valuing People		
Agility and Resilience		
Organizational Learning		
Focus on Success and Innovation		
Management by Fact		
Societal Contributions		
Ethics and Transparency		
Delivering Value and Results		

Adapted from "Are You a Role-Model Leader?" Baldridge Performance Excellence Program, (2021).

Exercise 3. Examples from students for Leadership

Theory/Concept	Characteristics of the Theory/Concept	Example from the Case
Theory X	Traditional management	Frankie micromanages experienced employees.
Theory y	Humanistic management	
Laissez-faire	Lack of management	GMs have little supervision within each store's operations
Bias	Favoring one employee over another	Nepotism creates problems, because some employees are promoted without the necessary skills.
Passive aggressive behavior	Inconsistent leadership and management	
Mission/Vision/	Mission is a statement of purpose. Vision is a goal statement.	
Clarity of operating processes and procedures	Routines and key people make up for lack of processes.	
Strategic, operational, tactical goals	Must be written as goal statements. Often, nothing is aligned or researched yet.	
Expectancy theory	What is rewarded will be repeated	
Fundamental attributional bias	Employees are always blamed	

Exercise 4. Examples from students for Ethics Analysis

Ethical Theory	Brief Description	Example from Case
Utilitarianism	John Stuart Mill: The most good for the most people. Usually focuses on money and consequences.	No Ethics code. No Code of conduct.
Deontology	Immanuel Kant: moral intent, doing your duty, duty first	Expected of employees but not of leadership
Ethic of care	Aristotle: Developed from the moral man and comes from benefice, later referred to as part of feminist theory. Beneficence - what is right and good is related.	What is good for the business is good for everybody.
Virtue theory	Aristotle: A person's character and virtue are central to their ethical beliefs and actions.	The organization believes that providing jobs for people is a virtue
Human Rights		
Corporate social responsibility		

Exercise 5. Examples from students for Sustainability Analysis

Elements of Sustainability		
Environmental	Social	Economic
Zero waste	social responsibility	corporate governance
Recycle, reuse	treating employees fairly	risk management
Less material used	social license	economic growth
Financial responsibility	stakeholders	profit
Carbon footprint	equal opportunity/diversity	reduce costs
	Good neighbor	
	Respect the individual	

Exercise 6. Culture Analysis using the Cultural Web

Cultural Dimension	Strengths	Opportunities for Improvement
Controls		
Routines and Rituals		
Stories		
Symbols		
Power and Politics		
Organizational Structure		
Paradigm		

Adapted from Johnson & Scholes (2005).