The Decline of a Professional Academic Organization: Examining a Regional Association

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Organizations, civic clubs, volunteer associations, academic societies and associations, and religious and non-profit organizations have experienced declines in membership and participation during the past decades. The advent of COVID and the disruption to travel, gathering, and social activities is often cited as hastening what had already been seen as a trend and perhaps providing the death knell for many organizations and associations. Academic organizations and professional societies dedicated to fields of study and the advancement of knowledge in specific disciplines are no exception to these trends, and many have seen steep declines in participation and membership. This paper examines the case of a regional academic organization, the Southwest Case Research Association (SWCRA), and the negative trend lines experienced by the organization. Potential solutions are discussed in preparation of strategic planning and positioning for the future.

Keywords: society, professional association, declining membership, academic organizations

INTRODUCTION

Many organizations go through what is referred to as the *organizational life cycle* made up of several stages: startup, growth, maturity, renewal, or decline. This paper focuses on a professional academic organization, Southwest Case Research Association (SWCRA). The issues involved in this organization are unique in some respects but also follow the typical life cycle model. The association has annual conferences in which association members and academicians submit business cases and case teaching notes for presentations in a roundtable discussion format. SWCRA is part of a larger association, the Federation of Business Disciplines (FBD), which consists of 11 different business academic organizations that meet annually at FBD Board-selected locations, primarily in the southwest United States.

Academic society membership is declining worldwide, with the Mainichi Shimbun and the Japan Science and Technology Agency finding 70% of surveyed societies reporting a decline in membership (The Mainichi, 019). "Detachment from such groups appears to stem partly from personnel expenditure cuts at national universities due to a government policy of lowering grants to those institutions for operational expenses. Private companies' Cost-cutting measures are also considered to be behind the drop" (p.1). Such declines are basic to almost all organizations. Putnam in 1995 spoke of fraternal organizations during the 1980s and 1990s suffering substantial drops in membership, noting possible explanations including demographic and technological transformations. Relevance is a common theme among those studying professional groups and organizations (Morris, 2005; Brock, 006; Beaton, 2010). Morand found in *the 2020 Membership Growth Report* that 68% of organizations surveyed had difficulty growing their membership, 5% had no growth, and 11% shrank. Several interviewed by Moran discussed that effect of COVID but noted that most membership organization engagement metrics were already declining.

ORGANIZATIONAL LIFE CYCLE (OLC)

Like the life cycle of living organisms, the life cycle of an organization begins at the organization's "birth" or beginning and ends at its "death" or termination. There are four stages in the organizational life cycle (OLC): start-up, growth, maturity, and decline. Organizations move from one stage to the other as each organization's relationship to the environment (external influences) and efficiency/effectiveness (internal influences) change. Therefore, as the organization moves through these stages, leadership needs to examine and change the organization's objectives, strategies, culture, and technology as necessary. Each of the OLC stages are discussed below. While the literature focuses on the OLC of businesses, the following discussion adapts the OLC model to a professional organization.

Start-up: SWCRA was formed in 1992 at the behest of the North American Case Research Association (NACRA). NACRA is a collaborative organization of approximately 500 researchers, case writers, and teachers mostly in the business disciplines, who support each other's research and writing efforts. SWCRA is an independent group with its officers, conference schedule, et.

Growth: As with many new organizations, initial growth was explosive, with 84 members in the first few years. There was not only a published proceeding of each conference but an active peer-reviewed journal as well

Maturity: For several years, the organization had robust attendance and participation in several tracts representing different disciplines: accounting/finance, marketing, ethics, strategic management, and a track for new case writers and students. The roundtable format was maintained, and that encouraged participation and discussion of submitted cases.

Decline: One factor in decline for traditional businesses is a drop-in demand for the product. This may be a factor with SWCRA as attendance has struggled to cover the conference expenses and remain a viable organization. In the decline stage, leadership must reframe the organization's mission and make necessary changes to stimulate demand. Many of the previous members of the association have retired or become inactive in writing and presenting cases, which has contributed to the decline in attendance.

BACKGROUND OF THE CASE METHOD

The case method evolved from the casebook method—a mode of teaching based on Socratic principles pioneered at Harvard Law School by Christopher C. Langdell. Like the casebook method, the case method calls upon students to take on the role of an actual person (or actor) faced with a difficult problem. The Harvard Business School later adopted this method of teaching, where it is still used. The first published business case was one page in length and proposed two questions for readers after identifying the situation: (1) What factors should be developed in the investigation on the part of management; and (2) What are the general policies following which these conditions should be remedied? (Biddle, 1921). Readers of the case are given relevant details and then asked to describe the situation, analyze provide diagnostics, and propose solutions to the problem presented.

Unlike that first published case study, cases today are much longer, have more data, and are moving toward including video and sometimes virtual reality components (Stephens, Silver, Whitlock, Richards, 2022). Case studies were first developed from edited cases of court decisions to teach law students. However, business education is unique from law education (Exploring, Harvard, 2021). Business case study methods have, therefore, evolved into the world of business, and there are not always well-defined and consistent practices and procedures that can be definitively cited. Furthermore, the areas being addressed in business cases are often ill-defined managerial problems under time constraints, uncertainty, and everchanging conditions (Donham, 1922). Such turbulence and ambiguity provide situational analysis, diagnosis, and problem-solving solutions that require creative thinking, and holistic and strategic decision-making, making them ideal preparation and activities for business students preparing for careers and leadership in such environments.

Cases are narratives, situations, select data samplings, or statements that present unresolved and provocative issues, situations, or questions (Indiana University Teaching Handbook, 2005). The case method is a participatory, discussion-based way of learning where students gain critical thinking, communication, and group dynamics skills. It is a type of problem-based learning. Often utilized in the professional schools of medicine, law, and business, the case method is now used successfully in disciplines such as engineering, chemistry, education, and journalism. Students typically work through a case during class as a whole or in small groups.

Case studies typically have an exciting introduction that captures the audience by telling a story of a situation that guides the student to answer questions of "how" and "why." When a case discussion starts, professors often ask students to lay out the facts as they see them (The Art, 2021). Contextual learning is enhanced through this experience of immersing students in a situation and providing the backdrop for active learning and better retention. One of the best components of case studies is the "real-world" scenario of relative values and uncertainty. Situations are not always absolute in the real world of business as they often are in problems presented in and by textbooks. There are unknowns and variables students must create and utilize in the solution to the case study. Professors can lead students through the scenario without prejudging their outcomes but by offering a focus on relevant points and applicable theories.

Case studies are often accompanied by a synopsis so that professors can quickly review to see if the case study fits a certain class level or subject. Professors seek cases that fit their class and address the uniqueness of the students, their experiences, what they already know, and need to know (The Art, 2021). In addition, the case study (story), sometimes with discussion questions and sometimes not, will be accompanied by a case study solution that often suggests answers written by the case study authors. However, students may produce varied answers based on their perspectives and assumptions in the scenario. In addition to working through the case study, students will also benefit from sharing their thoughts and solutions within groups or the entire class for discussion and debate (Bruner, 2002; Christensen, Garvin, Sweet, 1991).

Because case studies mimic real-world scenarios and involve the ancient method of story-telling or parables as an instructional method, students may be more likely to engage in the material and retain the knowledge learned throughout the research process. Professors become facilitators who guide students to figure it out as if they were a character in the case study by utilizing what they have learned or are learning in the class/program in which they are enrolled. Students must then decide based on facts and assumptions and not only present it, but often present it professionally to an intended audience at their level of understanding of the subject.

When working in groups, case studies can take on the role of developing trust, respect, and risk-taking (Bruner, 2002). Students take on distinct roles in the case study or address different situations based on their major, area of expertise, or research interest. They then must trust their group to (1) complete their responsibilities and contributions and (2) share their assumptions and ideas with cooperation and mutual respect, and professionalism as they cooperatively determine their recommended course of action. When making assumptions, students take a risk that the teacher/facilitator will support their assumption and must base their conclusions and recommendations on facts given, research conducted, and critical thinking skills. Two great components of case study in groups are the opportunity to evaluate student's understanding

against perceptions of other students and to help prepare students for discussions in the classroom by predicting and understanding feedback as well as prepare students for real-world discussions, which is the aim of case studies in the business courses (The Heart, 2021).

Student preparation is essential for successful case study and subsequent discussions (The Heart of the Case Method, 2021). The heart of the case study teaching method lies in how students learn. Rather than the professor/teacher simply lecturing, the students must take an active role in understanding, researching, making assumptions, discussing, and then ultimately providing answers to underlying or obvious issues with the case study. Student participation must be active and involved. Not only does this reinforce learning, but case study participation may also lead to higher integrity in a classroom due to the ambiguity of the "correct answers" to the case studies. Because of the assumptions and critical thinking involved, students must submit original work for grading and thereby decrease levels of academic dishonesty in courses.

HISTORY OF SOUTHWEST CASE RESEARCH ASSOCIATION

The origin of the Southwest Case Research Association is traced to the efforts of members of the North American Case Research Association (NACRA) and their desire to sponsor workshops at the annual meeting of the Southwest Federation of Academic Disciplines (SWFAD) as a service to that organization's members. SWFAD was later rebranded as the Federation of Business Disciplines (FBD). In March 1991, Tim Singleton, past president of NACRA, challenged case researchers to do something "different" to reenergize the NACRA involvement at SWFAD. The challenge was answered by a few dedicated scholars who formed SWCRA during the subsequent year.

Supported by NACRA, the new association held its first formal meeting in San Antonio in March 1992 when it published its first volume of proceedings. The first president at that meeting was Robert McClashan of the University of Houston, Clear Lake. Carl Ruthstrom served as program chair and as the first editor of the Association's journal, the *Journal of Applied Case Research*. While the initial participants numbered 79, 84 charter members were identified.

The first full slate of officers was elected at the 1992 meeting: Carl Ruthstrom, President; Walt Green, 1993 Program Chair; Secretary and Historian Michael Menefee; and Robert Carter, Treasurer. See Appendix 1 for a list of presidents of SWCRA. The Association wrote and enacted a Constitution and By-Laws. These were updated significantly at the 003 meeting in Houston and have been amended periodically.

The history of registrations with SWFAD/FBD can be found in Figure 1. The trendline shows a steady decline in registrations. In 2020, the public was just learning about Covid days before the conference. While attendance suffered, registrations did not due to the nature of early registrations. FBD did not honor refunds for the Covid cancellations. In 2021, FBD did not hold an annual conference due to Covid regulations; however, Southeastern Oklahoma State University hosted a combined conference via Zoom with the Association of Small Business and Entrepreneurship (ASBE). The registrations for SWCRA from 2015 to 2023 are shown in figure 2. Each case submitted should have an author present to discuss the case at round table sessions.

FIGURE 1 SWFAD/FBD REGISTRATIONS

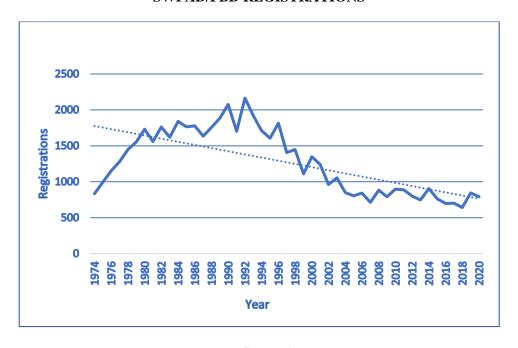
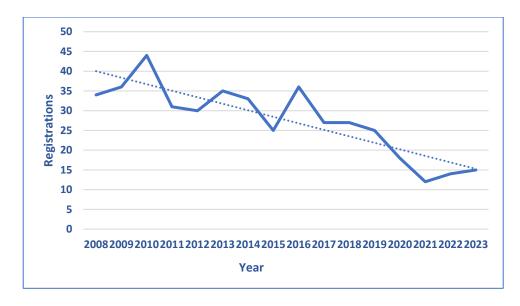


FIGURE 2 SWCRA REGISTRATIONS



CASE SUBMISSIONS TO SWCRA

Teaching cases are related to the program tracks listed in the call for cases sent out each year several months before the annual meetings and in coordination with FBD. Cases are required to be typed, double-spaced, and no longer than 30 pages. Each case must include an instructor's manual (teaching notes), which should include:

- Case Overview Analysis
- Objectives

- Courses and Levels Epilogue (if appropriate)
- Discussion Questions
- Answers to the Discussion Questions
- References

Figure 3 shows the number of cases submitted from 2015-2023. SWCRA recently discovered that historical data was lost due to the passing of the historian.

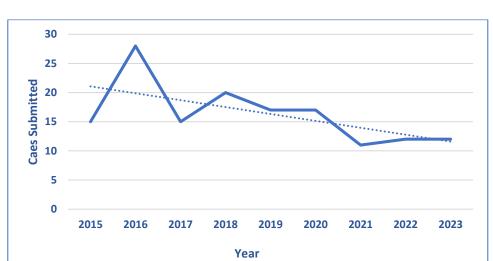


FIGURE 3 SWCRA CASES SUBMITTED

Cases are to be based on actual organizational data, either from primary or secondary sources. Cases that are not based on factual situations and organizations, but were written as specific teaching tools, are also considered but will not be eligible for the Best-Case Award or for publication in the association's *Journal of Applied Case Research*. Each case is double-blind reviewed and the author(s) who revise the cases/teaching notes according to the instructions of the reviewers will have their case considered for publication in the *Journal* that meets the requirements as a peer-reviewed journal publication for promotion/tenure considerations. The type of case is to be identified when submitting and presented in a round table discussion format:

Decision Cases: Decision cases are distinguished by ending at a decision point. Usually, this is a decision facing the central character in the case, the decision-maker. A strong opening paragraph, often referred to as "the hook," should telegraph the decision scenario faced by the decision maker. No introductory paragraph is needed. Most often, decision cases are based on primary field research and are enriched by real characters and quotations, where appropriate. Beyond these basic conventions, the format of a decision case may vary based on the discipline, subject matter, and situation.

Descriptive Cases: Descriptive cases illustrate a broad scenario for organizational analysis. These cases must be based on real events and organizations but utilize secondary research where direct access to the organization is unavailable or may not be required. They are usually quite extensive and may blanket a broader timeframe than normally encompassed in a decision case. For example, a decision case might examine a CEO decision at SAP, while a descriptive case might explore the evolution of the ERP software industry from 1990 to 2010.

Critical Incidents: Critical incidents are also decision-focused, so they should open with a hook and end at the decision point. The distinguishing features here are focus and length. Critical incidents are five pages or less, tightly focused on a specific situation or decision, and intended to illustrate a singular teaching point. They are also real events, organizations, and characters.

Student Cases: SWCRA also provides students (both graduates and undergraduates) with an opportunity to submit cases for the conference. The student cases must be in the required format and submitted to the appropriate track for review. To encourage the submission of student cases, a special award of \$500 is given and is to be divided among the co-authors of the case. The following stipulations apply:

- 1. The case must be accepted in the appropriate track.
- 2. There can be no more than four co-authors.
- 3. The case must have a faculty sponsor, but the sponsor cannot do significant work on the case.
- 4. At least one student and the faculty sponsor must register for the conference and be present to present the case at the conference.
- 5. The accepted student cases will be submitted to a judging panel made up of the Board of Directors of the Association to select the best case.

HISTORY OF THE JOURNAL OF APPLIED CASE RESEARCH

The Journal of Applied Case Research

The *Journal of Applied Case Research* was founded by SWCRA to publish cases and papers dealing with issues in all business-related disciplines that involve case writing, research, and teaching. At the time, the *Journal* originally started, there were few publication outlets for cases. However, now there are several case journals, and many article-oriented journals will carry cases regularly. The *Journal* focuses on real-world cases based on field research or research from secondary sources. Fictitious cases are not considered for publication. An instructor's manual (teaching notes) must accompany each case to facilitate classroom use.

Dan Jennings of Texas A&M University succeeded Carl Ruthstrom as Proceedings and Journal Editor in 1997 and held those positions until 2000 when Leslie Toombs, University of Texas -- Tyler, became Editor. Alex Sharland of Barry University was appointed Editor in March 2002. Steve Maranville became Editor in 2007 and served for just over two years. Alex Sharland edited the Journal for one year (2009-2010) on an interim basis. At the 2010 meeting, Joe Kavanaugh was appointed to fill a three-year term as Vice President, Publications, and *Journal* editor. At the 014 meeting, Irfan Ahmed was appointed Vice President, Publications and Journal editor for a three-year term. During Steve Maranville's tenure the *Journal of Applied Case Research* became a fully digital and online outlet for case research. During recent years, the journal experienced technical issues and was published without clear ownership by the association. In 2023, the ownership was officially transferred to SWCRA, and a new editorial board was elected. The first journal edition in the newly formatted and redesigned format is scheduled for publication in the summer of 2023. Appendix lists the Editors of the Journal of Applied Case Research.

Factors Affecting Conference Attendance

Although the Association had around 90 members when it was first organized, membership and attendance has declined over the years to less than 0 attendees. This has become a major concern of remaining members and officers. One explanation for the decline is discussed in the topic of organizational life cycles. Over the last ten years, SWCRA—like many other academic organizations—has struggled to maintain attendance, much less increase participation and involvement. Many factors affect academic attendance at conferences, especially in recent years¹. One study of conference attendance evaluated five factors that might influence attendance (Challenges). Respondents were asked to rank five factors for their influence on conference attendance. These factors included: location, cost of attending, role at the conference, university reimbursement or travel to a conference, and value for tenure and promotion. The result of the ranking of these factors is shown in Table 1.

TABLE 1 FACTORS INFLUENCING CONFERENCE ATTENDANCE

Factor	Rank
Location	2
Cost of Attending	4
Your role at the conference	1
University reimbursement for the cost of the conference	
Value for tenure and promotion	

The two primary factors based on weighted averages were role in the conference and location. A person's role at a conference could range from being an attendee to a presenter, a track chair, or an association officer. Many, if not most universities, are more likely to fund a conference trip for presenting, being a track chair or officer. Some, but fewer, schools may fund attendance only to encourage networking and greater participation in the future.

The location factor was expected to be highly ranked. But it also represents a problem area for conference planners. More attractive locations may also entail higher budget commitments for the conference in terms of guaranteed room bookings and food and beverage budgets. In addition, some locations involve higher travel budgets based on airfare and per diem for the conference locations. These factors in turn mean higher requests for travel funds and higher out-of-pocket expenses for participants and discourage attendance. One association, the authors, are affiliated with intentionally avoids planning conferences in more attractive locations because the food and beverage guarantee are more than the conference can afford. Less attractive locations may offer a much lower guarantee for rooms and food and beverage to encourage that location as the conference venue. Still, for those who place a high value on location, these less attractive locations discourage attendance. This would be especially true for those attendees provided only one budget trip per year and multiple conference venues to choose from in deciding about conference attendance.

Increasing SWCRA Attendance

To address the issue of declining attendance, a meeting of current and past officers was held in the Spring of 2022. In this meeting, the participants reviewed prior years and their respective attendance numbers and focused on what changes could be implemented to encourage attendance at future meetings.

One idea was to have submitted cases that were double-blind reviewed to be rewritten following the reviewers' comments and then published in the *Journal*. Since the Journal is a peer reviewed journal, this would allow case submitters to get credit for a peer-reviewed publication. Since many business schools categorize publications into peer and non-peer-reviewed journals, this would raise the status of a published case and might result in an author using the publication for tenure and promotion if recognized as a peer-reviewed publication by the business school or college. This has been an issue for many associations in the publication of proceedings of annual association meetings, in that they are not recognized as peer-reviewed and are not counted for tenure and promotion. This would mean that a case submission could be counted as a presentation at an association meeting and a peer-reviewed publication. This idea might lead to potential case submitters view submitting a case to the annual meeting in a different light. Since at least one of the co-authors would have to attend to present the case, attendance would increase at the annual meetings.

A second idea discussed was to offer a \$500-dollar stipend for the best paper presented at the annual conference. Since a "best paper" selection was already used to recognize the best case submitted to the

annual conference, this might increase submission and, attendance. While \$500 was not a significant amount, especially if split among several co-authors, it would cover some expenses that might not be covered by the participants' school for conference attendance. This would be possible due to the large reserves held by the conference in a checking account accrued over the years of the association's existence.

The third idea was to encourage current association attendees to seek out colleagues interested in writing cases to submit a case to the annual conference. The current attendee could even function as a "mentor" to the colleague if they had not written or submitted cases to a conference prior to this time. This might also create the opportunity to get younger colleagues interested in the association and help rejuvenate SWCRA with newer, younger members to offset the retirements and departures of existing members.

There was agreement among all members that some of these suggestions should be implemented, but additional definitive solutions will require formal strategic planning.

CONCLUSION

Declining membership and participation are phenomena decades in the making and experience across a wide spectrum of organizations, clubs, societies, and associations. Continued relevance, demonstrating the value proposition, and ease of membership and attendance will be key for such organizations navigating sustainability. Though COVID certainly hastened the decline and even demise of many organizations, those trend lines existed before the pandemic. A relaunch of purpose, methodologies, a commitment to adaptability, and a renewed focus on value proposition will be necessary for those associations that want to remain viable over the next decades.

ENDNOTE

COVID completely upended academic conferences, professional and learned societies for at least two years. Many conferences and professional meetings were cancelled and travel—both nationally and internationally—virtually grounded to a halt. Institutional administrations were restricted by regents and trustees and state governments mandating no interstate travel, and it is likely that some of these travel cuts may not be fully and completely restored once COVID-related travel restrictions and related limitations completely subside.

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APPENDIX 1: PAST SWCRA PRESIDENTS

1992-1993	Carl Ruthstrom	2008-2009	Alex Sharland
1993-1994	Walt Green	2009-2010	Steve Vitucci
1994–1995	Michael Menefee	2010-2011	Don Mosley, Jr.
1995–1996	Doug Grider	2011–2012	Rodney Vandeveer
1996-1997	Daniel Jennings	2012-2013	Jeffrey Miller
1997–1998	Stanley Phillips	2013-2014	Irfan Ahmed
1998–1999	Leslie Toombs	2014–2015	Simon Medcalfe
1999-2000	Patricia Feltes	2015-2016	Robert Stevens
2000-2001	Marlene Reed	2016-2017	Timothy D. Wise
2001-2002	Wilke English	2017–2018	Lawrence Silver
2002-2003	Carol Cumber	2018–2019	Courtney Kernek
2003-2004	Kay Guess	2019-2020	Rhonda Richards
2004-2005	Steve Maranville	2020-2021	Kendra Ingram
2005-2006	Hank Maddux	2021-2022	David Whitlock
2006-2007	Carol Cumber	2022-2023	Cody Bogard
2007-2008	Joe Kavanaugh	2023-2024	Robert Stevens

APPENDIX 2: EDITORS OF THE JOURNAL OF APPLIED CASE RESEARCH

1992–1997	Carl Ruthstrom
1997-2000	Daniel Jennings
2000-2002	Leslie Toombs
2002-2007	Alex Sharland
2007-2009	Steven J. Maranville
2009-2010	Alex Sharland
2010-2015	Joseph J. Kavanaugh
2015-2023	Irfan Ahmed
2023	David Whitlock, Interim