Journal of Strategic Management Education 12: 59-74.

Beyond the Business Case

Gary Shaheen
Syracuse University, New York, USA

Abstract. From 2009-2014, Gary Shaheen, MPA, ABD was primarily responsible for creating, and then co-taught a section of the Syracuse University, NY Whitman School of Management course: 'Emerging Enterprises Consulting' that was subtitled 'Inclusive Entrepreneurship', that received a Chancellor's Award for Academic Excellence in 2010. This case study is a composite of a situation faced by an aspiring entrepreneur with a disability, and could be very representative of the challenges faced by people with disabilities as they create new, small scale business ventures. The case study is intended for students of social entrepreneurship, and is also appropriate for students of social work and disability studies who are intent on exploring the social value of assisting people with significant work-related barriers to become self-employed. The case study introduces the 'Inclusive Entrepreneurship Template' that provides a framework for aspiring entrepreneurs and those assisting them as business consultants to explore the individual (person-centered), venture (business operations) and context (environmental) factors that are necessary to consider in launching and growing small scale business ventures. The case example then proceeds to a description of the individual entrepreneur, including both his strengths and challenges, and allows students to examine these by responding to a series of questions using the Inclusive Entrepreneurship Template. Instructors can follow the Teaching Notes for use of the case example and refer to the references for additional class-assigned readings. By the end of the case exercise, students will develop improved awareness and knowledge of the challenges and barriers often encountered by small ventures prospectively owned by people with disabilities.

Keywords: Social Entrepreneurship; New Venture Creation; Employment and Disability; Self-Employment and Disability; Micro-Enterprise Development; Person-Centered Planning; Inclusive Entrepreneurship.

1. Summary

This case provides an example of individual entrepreneurship for people with disabilities. Social entrepreneurship's both social and economic goals can be met by seeding and supporting small scale venture creation that assists people with disabilities to achieve financial stability and improve social inclusion. Social entrepreneurship students who understand the fundamentals of small venture development will benefit from this case. Disability studies students who understand person-centered planning and the employment challenges faced by people with disabilities are also likely to benefit from this case. The optimal benefit may be realized by assigning students of both disciples as members of the same study teams to better leverage and apply their specific academic knowledge to the case example. After students read through the case, they will answer challenge questions related to the entrepreneur's personal, venture operational infrastructure, and environmental barriers to new venture start-up, using an

'Inclusive Entrepreneurship Template'. The case exercise provides students with an opportunity to critically examine and discuss how they would assist a prospective entrepreneur with a disability in overcoming the personal, small enterprise infrastructure and environmental challenges that prospective entrepreneurs with disabilities often face in developing or scaling up their new ventures.

There are three aspects to the Inclusive Entrepreneurship Template that students will consider for the case exercise:

> *Inclusive Entrepreneurship* is defined as: "*A strategy and process for assisting people with diverse disabilities to become entrepreneurs through new venture planning training, use of customized new venture development goal and support planning, and access to financial resources utilizing the resources of diverse public and private partners working within a consensus-driven, collaborative framework*" (Shaheen & Tihic, 2009).

Individual-centric aspects: Students will explore the entrepreneur's personal background as presented in the case. They will focus upon the entrepreneur's skills and talents, motivation for starting a small venture, support networks, impacts of disabilities on venture start-up, the perceived venture opportunity, daily life routines affecting the enterprise and other factors necessary to understanding the 'owner behind the small venture'. Students will critically examine and discuss the ways that disabilities can affect new venture creation both positively and negatively based upon the information provided in the case example.

Venture-centric aspects: Here is where students explore the small venture start-up infrastructure including the essential elements of the new venture plan, and its marketing plans; its product/service mix; financial accounting systems; technology; facilities and equipment; supply chain; inventory management systems; and other factors that are necessary to conduct the day-day operations of the small venture.

Context-centric aspects: New small ventures operate in a variety of contexts and environments unique to their product/services mix, operational strengths and constraints, relationship to their markets and other factors. Students will examine how the venture proposes to interact with these environments that can also include how it positions itself in relationship to government regulations, legal issues, customers, suppliers and other public and private agencies that interact with, and support employment and entrepreneurship for people with disabilities. Students will critically examine and better understand the venture's market niche; competitors; the economic conditions affecting the venture's operations;

(including financing opportunities, networks of mentors and associations with disability support services agencies), and other factors that the small venture must consider to get its products and services produced and to the market. Students will gain a better appreciation for both the challenges and opportunities for new venture creation encountered by entrepreneurs with disabilities.

2. Learning Objectives

By the end of the case exercise, students will develop improved awareness and knowledge of the challenges and barriers often encountered by small ventures prospectively owned by people with disabilities that include: underdeveloped business planning skills, under-capitalization; insufficient market leveraging ability; lack of new venture infrastructure elements (that can include accounting, law, finance, marketing or advertising); have no strong venture creation and support networks; and have difficulties negotiating environments that support new venture creation where accommodations for a person's disability may not be available.

III.Case Example: "Belts by John"

1) Individual-centric aspects

Background: John Jones is a 55-year-old African American man who was a former truck driver. He was forced to retire from his 25-year career due to a vehicle accident that he sustained while working that affected his eyesight. Since he left his job 2 years ago, his eyesight has gotten progressively worse and he is now classified as legally blind. Where once he relished being on the road as a driver, and being able to support himself and his family, he now spends most of his days attending group activities at a Recreation Center with other people with visual disabilities, or reading books and periodicals in Braille. He learned how to produce leather crafts at his group sessions and pursues leatherworking as a hobby. Leather working keeps him active and gives him a purpose. He also says that it helps him to avoid the occasional bouts of depression he experiences when he thinks about the way his life used to be. He particularly misses meeting all sorts of people in his travels. It seems that now, except for his wife, everyone he associates with, also has a visual disability. He gets tired sometimes of people at the Recreation Center that can't seem to talk about anything other than their disability. And, in the community, he finds that he is often regarded with pity as a person with an apparent disability, not as the independent, skilled person he knows that he still is. As he continued to lose his eyesight he became more and more interested in getting back to being the self-reliant person he always was, by converting his leather-working hobby into a new venture.

John's idea is to create a selection of hand-tooled belts, including belts that truck drivers would buy for back support. His counselor at the Commission for the Blind and Visually Handicapped (CBVH) told him that he is limited in the amount of outside income he can make without losing his Social Security benefits or affecting his Worker's Compensation benefits. CBVH is a New York State agency that helps people with visual disabilities obtain living, educational, public assistance, and employment benefits and opportunities. But the counselor also said that financial assistance for the purchase of equipment could be available if he presented them with a business plan that demonstrates the viability of the venture. CBVH could also arrange to provide benefits planning assistance, so John could use special work incentives that might allow him to make money and not lose his benefits until his income is sufficient for him to become self-sufficient. He has to remain within limits for the personal cash assets he can maintain without loss of benefits, but he does have about $2,000.00 US that he has saved up that can be used to help start the new venture.

Venture Concept: Belts by John is a startup new venture proposing to offer high quality leather belts and accessories to people who look for genuine US made leather goods. The core attribute that Belts by John offers is its quality – they will be genuine leather belts that the customer could use for years. Through customization, the customers will be able to tailor the belt under their own preferences. For example, for the truck driver, the unique value that Belts by John provides is the stability it can provide to the lower back for extended periods of time that is directly related to the high quality of the belt.

He is also aware of some of the challenges in creating his new venture- particularly how a person with a visual disability could achieve production benchmarks using machinery that was created for use by people with good vision. His new venture proposes to generate revenues through selling belts, but also by inspiring others with his type of disability by potentially by teaching leather working techniques to other people who are blind. John does not know what the market rate for a belt similar to those he would produce would be, but he estimates the retail price of a regular everyday belt to be about $50.00 US. He does not know how he would market his belts, but he hopes to sell the belts through online belt shops and handcraft shops. He estimates that he can produce 3-4 belts per day using his hand tools. But he also knows that cutting, punching, sewing and tooling machinery exists that will dramatically increase his daily production. He does not know if the equipment would allow operation by a person who is blind.

Venture Opportunity: According to John, the new venture opportunity is generated by his perception that the public, and specialized segments like truck drivers need high quality belts for safety, status and for daily use. He has not undertaken any formal marketing research to substantiate these assumptions. However, he has contacted people he knows in the trucking industry and was told that high quality driver's belts could be a saleable commodity to individuals and companies. He also polled people at the Recreation Center on three different occasions about their interest in buying quality leather belts and received generally favorable responses. He does not yet know when customers would choose his belt over those of competitors. He has sold 15 belts during the past year that he made by hand over a 6-week period to friends and family at an average price of $35.00 US each.

2) *Venture-centric aspects*

New Venture Infrastructure: John needs a strong business and operational plan in order to realize his hopes for a financially viable small venture. As the new venture is still in its developmental stage, there are currently no existing financial records of past sales, nor is there a point of sale system in place. His accounting systems are not in place that might enable him to determine the company's break-even point. John wants to sell his belts for $50.00 US each and estimates that the production cost per unit is approximately $20.00-$25.00 US. He buys his raw leather in small quantities through a local wholesaler but has not explored if he could purchase at a greater discount if he bought leather in quantity. He works from a room in his home, so storage space is small, although he plans to move his operations to his large basement. These factors would necessarily be included in his business plan that would allow him to apply for the CBVH start-up capital.

Belts by John also need to formulate a system for receiving and processing payments for its products. John needs to be able to process credit cards, cash, and potentially payments for large orders. He will also have to pay suppliers for inventory and potentially for machinery upkeep, a process that will require significant planning. Once the new venture is more mature, the company will need budgeting plans to ensure that John always has enough funds available to purchase necessary inventory and potential equipment maintenance. He also needs a system that tracks sales on a commission basis.

Operations: At this stage, John has not made a specific decision about the styles of product that he will offer. Instead, he wants to create a customized product where customers can select the belt's hide, color, and their own design. Formalizing a basic design frame that can be customized could simplify production and inventory management. The beginning process of making belts, such as dyeing and drying hide, generally involves considerable time. However, he expects that most of his final work will be done by machines and will take less than half an hour to finish.

John works at leather goods production now when he feels like it. He thinks that by improving a work-flow calendar, he will be able to develop other aspects of the new venture during each queue time as belts are being stamped and sized. For example, he might expand his new venture to include book covers, key chains, and wallets to maximize the usage of hide and use up scrap. John wants to market the products in local custom leather stores, boutiques, and online distributors. Since managing a website regularly requires professional managing skills, he plans to outsource the online-sales to a 3rd party. After receiving an order, he plans to use United State Postal Services (USPS) as his preferred shipping method to deliver the product with flat rate boxes from home. He chose USPS because first class rates include insurance of up to $50.00 US per box and free delivery tracking.

Equipment and Production: John's new venture needs a sound infrastructure before operations can begin. He plans to order all of the machinery and equipment needed to start his new venture from a leather-working catalogue. But he is not sure that they can be used by a person who is blind, so he needs to do more research. At first, he will order just enough materials to start his new venture and produce up to twelve belts per week. As his products become recognized and the demand for his belts grow, then John will explore getting a bulk discount on his supplies. Depending on his new venture plan, John could receive his machinery and initial materials at no cost through CBVH funding, which will significantly reduce startup costs. But they will not release funds until he presents them with a viable new venture plan. CBVH also needs to know if a machine John selects can be used safely by a person who is blind.

John also needs to renovate his basement, which he estimates to be under $1000.00 US in cost as his step-son is completing all aspects of the improvement for free. His basement has approximately 400 square feet of space that he can use for production and storage. As of now, John's basement will likely be sufficient for his production levels but there should be a plan in place should production volumes exceed the space available. The company will likely not need any additional full-time employees immediately but again, there needs to be a plan in place should the company's sales grow quickly.

John currently has a computer that he uses somewhat frequently but he thinks that he may want to buy a laptop before he begins the new venture. This potential cost need to be included in the company's internal infrastructure needs, should the purchase be made. If the company's equipment ever breaks down, John will need to have enough money available to pay for moderate repairs to machinery. Finally, John needs to keep records of the products he produces in addition to his financial records.

3) Context-centric aspects

Market Assumptions: The potential target market of Belts by John are people who look for quality custom made leather belts, western style attire, the motorcycle enthusiast, as well as truck drivers that will use them for safety purposes. John does not yet know if his market assumptions are correct, but he thinks he will need two types of marketing research: Primary market research and Secondary market research. Through primary research, he thinks that conducting a customer survey will help him understand if the customers are interested in his product, the price they would be willing to pay, and what else John could do to improve the product and its market position. From secondary industry research, he will know what type of customer will be mostly interested in genuine leather goods.

Branding and Market Positioning: In order to increase recognition of his brand, John wants to craft a story about his entrepreneurial spirit as a person who is blind. Along with the inspiring story, Belts by John will be seen as more than another leather brand marketed to customers. Instead, buying the leather goods becomes another way of demonstrating that people with disabilities can contribute to the economy as new venture owners and earn real wages when they can start and own their own new ventures.

Distribution: Since it is hard for John to take care of product development, production, and operation by himself, he thinks that he should sell the product through third party distributors such as online stores and leather goods wholesalers. He thinks that different distribution strategies should be designed in order to reach out to different types of customers. For instance, safety belts for truck drivers could be distributed through wholesalers that could sell to trucking companies.

Competitive Environment: John believes he will face a large number of direct and indirect competitive threats. Direct competitors will be the local leather shops, and online stores those focus on leather products. Also, there is product overlap with major retailers like the US based firms, J.C. Penny's, Macy's, and Target, particularly for belts, that will be another competitive risk for his new venture. He believes that sustaining high quality products and understanding customer's trends will be the solution to overcome the potential threats.

Financing: John wants to obtain funding from CBVH. CVBH can provide up to $10,000.00 US to aid in new venture start-up, including equipment based on a feasibility analysis and a commercially viable new venture plan. If funding is granted, then CBVH will purchase the machines for John, so they don't show up as an asset and affect the receipt of his disability benefits. John also has to prove that the new venture will earn him living wage income over time, and is not a just a hobby used to make a little extra money. He needs to be earning at least minimum wage from the sales of his products. John thinks that once he gets over the learning curve, he'll be able to make more than minimum wage. But in the short-term, he estimates that his owner's draw will be equal to federal minimum wage.

Networks: John's support team consists of his new venture partner Bill White and his CBVH counselor, Dennis Kitchen. Dennis, along with other CBVH employees, will actually be responsible for approving John's final new venture plan so John must be in constant communication with them as he develops his venture. Bill is a very close friend of John and will help with certain tasks that may be difficult for him to complete. Bill took financial literacy and QuickBooks training, so he will be able to help with the early stages of the company's financials. He can assist John in shipping, bookkeeping, etc. and he has also been doing a lot of reading for John while Dennis finalizes the purchase of a portable reader. Bill has sufficient ability in using Microsoft Excel to assist John in maintaining financial records. John has relationships with people from a couple different new venture incubators in the area as well. He has been told that he may be able to rent incubator space, once his new venture gets started. His social networks, once large, have diminished greatly since he became disabled and his ability to get around has been compromised since he can't drive a car.

Despite his challenges, John believes that he has the skills and determination and the knowledge needed to become a successful entrepreneur. He also hopes that once his new venture is established, he can create jobs for other people with disabilities.

3. Assignment

a) Pre-work

Pre-work includes developing a working familiarity with the Inclusive Entrepreneurship Template, described below. Students also will view a video: "*Aimee Mullins and Her 10 Pairs of Legs*" (http://www.ted.com/talks/aimee_mullins_prosthetic_aesthetics.html) that challenges popular conceptions of disability as meaning "non-abled". Students will also be introduced to additional resources on the topic that include readings from the syllabus on topics related to social inclusion of people with disabilities, the meaning and context of entrepreneurship, and practical methods for supporting entrepreneurship for people with disabilities. The brief vignettes of successful new ventures started by entrepreneurs with disabilities contained in Griffin and Hammis' "Making Self-Employment Work for People with Disabilities" (Griffin and Hammis, 2003, pp.4-7) offer additional evidence that disability labels need not be an impediment to success as an entrepreneur. Orienting students to strengths-based concepts concerning people with disabilities will help in establishing a framework for them to better understand not only the challenges, but also the strengths that can arise from living with a disability and become a potential resource as they create new ventures.

b) Post-work

After intensive classwork, discussion concludes, and students are expected to think about and apply their insights and their knowledge to challenge questions in their work as social entrepreneurs helping to create small ventures that are owned and operated by people with diverse disabilities.

4. Theoretical Framework

"Entrepreneurs are innovative, opportunity-oriented, resourceful, value-creating change agents" (Dees, Emerson, & Economy, 2001: 4). These change agents can operate in the for-profit, commercial sector creating product innovations for commercial purposes (Steve Jobs of Apple Corporation, for example), or in the social, non-profit sector, realigning systems and creating new opportunities for blended business and social impact. While commercial enterprises may adopt social goals by establishing philanthropic divisions within their corporations, the company's primary *raison d'etre* is commercial, not social return on investment. However, as Dees et al note, social entrepreneurs are different than commercial entrepreneurs since they start out with a social purpose in mind and apply business methods to achieve a goal of positive social change. The return on investment is measured by the level of achievement of the social purpose as well as the level of success of their business methods.

Much of the research on the topic of social entrepreneurship examines social ventures that are created to involve groups of individuals with disabilities and/or disadvantages with the goal of equalizing their participation in the labor force and helping them achieve financial stability commensurate with their non-disabled peers (Dees & Economy, 2001; Defourney & Nyssens, 2007; Roberts Economic Development Fund, 2015; Warner & Mandiberg, 2006). However, assisting people with disabilities and economic disadvantages to start and operate their own small commercial ventures is another facet of social entrepreneurship that aligns well with social entrepreneurship theoretical frameworks. These frameworks aid in defining social entrepreneurship as *"an innovative, social value creating activity that can occur within or across the nonprofit, business or government sectors."* (Austin et al., 2006: 2). Austin et al posit a theoretical framework that aligns well with social entrepreneurship efforts to address income inequality among people with disabilities by assisting them to develop their own small commercial ventures, instead of providing wage-based jobs for groups of people.

The authors offer that social entrepreneurship is a dynamic fit between four interrelated concepts (OCPD Framework): 1) "**O**pportunity" (a desired future state that is different than the current state and achievable), 2) "**C**ontext" (factors outside the control of management but that affect the venture), 3) "**P**eople and

Resources" (the human and financial capital inputs supporting the venture), and 4) "**D**eals" (mutually beneficial arrangements between the venture and all resource providers). The OCPD social entrepreneurship theory correlates well with Inclusive Entrepreneurship and is relevant to situations like that presented in the case example in a number of ways.

Inclusive Entrepreneurship grew from a seed development grant provided by the US Department of Labor/Office of Disability Employment Policy (ODEP) to test and demonstrate new self-employment methods for people with disabilities. *The Opportunity*, in this case was not only the availability of a three-year government demonstration grant, but also the interest of ODEP policymakers to test how people with disabilities could increase their economic self-reliance as independent business owners rather than being relegated to either unemployment, full reliance on government social welfare benefits, or as workers in sheltered, segregated workshops. The high unemployment rate of people with disabilities in the US and the relatively underutilized method of assisting them to become self-employed also created opportunities. *The Context* included a national movement promoting least restrictive, individualized and integrated work for people with disabilities, articulated in federal and state policies that self-employment naturally achieves. Also, the Syracuse University institute that managed the project had longstanding knowledge and expertise in researching and applying practical knowledge in new venture creation for people with disabilities and was familiar with negotiating the policy, practice and economic aspects of new venture creation. *People and Resources* were generated not only by the grant funding and by the Syracuse University team, but also by the project's commitment to develop cross-sector partnerships with business development agencies, disability services providers, government social service and economic departments and others to mobilize their support of the effort. And the desire for people to become more independent and increase their income as entrepreneurs contributed to an enrollment in the project of over 225 people with disabilities and the creation of over 60 small business ventures. *The Deal* was evidenced by leveraging the grant resources, cross-sector partnerships, the academic environment that supported the creation of the Inclusive Entrepreneurship class (the source of the case example), and the dreams and talents of prospective entrepreneurs as well to establish their own commercial ventures. Consequently, promoting opportunities for people with disabilities and/or disadvantages as individual entrepreneurs as a form of social entrepreneurship correlates well with theoretical foundations supporting social entrepreneurship in general. As such, it lends itself to replication in other communities and countries seeking to address income inequality among the over 15 per cent of the world's population that live with disabilities (World Health Organization, 2014).

The Inclusive Entrepreneurship Template provides a structure for discussing and analyzing new venture start up. As students review the case example, they will identify as many of the factors below that are apparent or that they may infer from reading the case. They will base their answers to the challenge questions on their interpretations of these factors, and their perceived effects on new venture start-up. They will recommend three possible solutions to challenges that the entrepreneur may face that are individual, venture-related or contextual.

Table: Inclusive Entrepreneurship Template

Individual-Centric	Venture-Centric	Context-Centric
The Entrepreneur	*Operational Infrastructure*	*New Venture & Social Contexts*
Individual characteristics including age; motivation for starting the small venture; family circumstances that affect the venture; financial circumstances/commitments that affect the venture; maturity; networks-personal, family and venture-related that assist in developing the small venture; effects of disability on venture operations (strengths and challenges); support needs-personal, family and new venture and how they are or will be met; future outlook-expectations of hours worked, financial expectations, venture growth expectations; perceptions of the opportunity	Existence of a financial record keeping system including breakeven point, cash flow; systems for receivables (timeliness and amount); systems for payables (timeliness and amount); ease of system use; financial controls; budgeting and financial planning system for collection and payment of VAT & other taxes; accuracy of records; costing structures	New venture creation environment including forces creating the opportunity; key success factors to capitalize upon opportunity; definition of the target market; barriers to entry; competitor shortcomings or strengths; size and growth potential of the market; fit between opportunity and concept; window of opportunity; customer loyalties to competitors and switching costs
Experiential Characteristics including training skills and credentials related to the specific venture being developed; history/experience related to the particular venture; educational, training background related to the particular venture	New Venture Operations including existence or need for a new venture plan that includes a marketing strategy and financial plan; facilities; equipment, human resource systems, supply chain, internal controls; health & safety; delivery; handling complaints and returns; hours of operation; capacity vs. demand; resource productivity; purchasing policies; customer service; inventory management and storage costs; outsourcing; value of inventory; quality control; theft/pilferage; performance benchmarking ratios; technology	Social Context including advantages or barriers to market entry that are disability-related; barriers to access for training and technical assistance; acceptance/support of entrepreneurship by disability – serving agencies; stigma and misconceptions about disability affecting the establishment and operations of a new small venture

References and Additional Resources:

"Aimee Mullins and her 12 Pairs of Legs" accessed at http://www.ted.com/talks/aimee_mullins_prosthetic_aesthetics.

Austin, J., Stevenson, H., and Wei Skillern, J. (2006). "Social and Commercial Entrepreneurship: Same, Different, or Both?" *Entrepreneurship Theory and Practice*, 30: 1-22.

Dees, G., Emerson, J, and Economy, P. (2001). *Enterprising Nonprofits: A Toolkit for Social Entrepreneurs* (New York: John Wiley).

Defourney, J. and Nyssens, M. (eds.) (2008). "Social Enterprise in Europe: Recent Trends and Developments," Working paper Series, No. 08/01. EMS European Research Network. Liege, Belgium.

Goffman, I. (1961). *Asylums* (New York, NY: Anchor Books).

Gottlieb, A., Myhill, W.N., and Blanck, P. (2010). "Employment of People with Disabilities," In J.H. Stone and M. Blouin (eds.), *International Encyclopedia of Rehabilitation* available online at http://cirrie.buffalo.edu/encyclopedia/en/article/123/.

Griffin, C. and Hammis, D. (2008). "Making Self-Employment Work for People with Disabilities," Chapter 1.

Hoogendoorn, B., Pennings, E., & Thurik, R. (2010). "What Do We Know About Social Entrepreneurship: An Analysis of the Empirical Research," Erasmus School of Economics. Erasmus University. Rotterdam, Netherlands.

Killeen, M., Adya, M., and Shaheen, G. (2010). *Inclusive Entrepreneurship-Final Project Report* (Syracuse, NY: Syracuse University).

Moss, T., Short, J., Payne, G. Tyge, and Lumpkin, T. (2010). "Dual Identities in Social Ventures: An Exploratory Study," *Entrepreneurship Theory and Practice,* 35(4): 805-830.

Shaheen, G. (2011) "Inclusive Entrepreneurship," in B. Kingma, *Academic Entrepreneurship and Community Engagement-Scholarship in Action and the Syracuse Miracle* (Cheltenham, UK: Edward Elgar Publishing Ltd.).

Shaheen, G and Killeen, M. (2010). "Primer on the Start-UP NY 4 Phase Entrepreneurship Model," (Syracuse, NY: Syracuse University).

Walls, R.T, Dowler, D.L., Cordingly, K., Orslene, L.E., and Greer, J.D. (2001). "Microenterprising and People with Disabilities: Strategies for Success and Failure," *The Journal of Rehabilitation,* 67(2): 29-35.

Warner, R. and Mandiberg, J. (2006). "An Update on Affirmative Businesses or Social Firms for People with Mental Illness," *Psychiatric Services,* 57(10): 1488-1492.

Wendell, S. (1996). "The Social Construction of Disability," Chapter 2, in *The Rejected Body: Feminist Philosophical Reflections on Disability* (New York, NY: Routledge).

Yunis, M. (2007). *Creating a World Without Poverty* (New York, NY: Public Affairs Publishing Company).

Teaching Note

The case requires approximately 2 hours of class participation time. Faculty provides a brief (5 minute) introduction of the case as an opportunity for students to apply their knowledge of the Inclusive Entrepreneurship Model and distributes the case example and the Inclusive Entrepreneurship Template to the class. Students are allowed 15 minutes to read the material. When the reading session ends, the class is divided into three teams that will address individual-centric, venture-centric, and context-centric aspects of new venture creation.

The teams will have 45 minutes to read, discuss and prepare their recommendations. They will elect a spokesperson as the lead for their team's presentation. When the discussion period ends, faculty allows students a 15-minute break. After they return, each team will have 15 minutes to present their research and recommendations. Each team must present: 1) A summary of the core issues, challenges, and opportunities related to their assigned aspect; 2) Answers to challenge questions and three recommendations for addressing the entrepreneur's needs and challenges related to that particular aspect, with; 3) Their rationale as to why these recommendations were made. After each presentation, the student audience is allowed up to 15 minutes to respond with comments and questions before the next team presents. Faculty summarizes the discussion during the last 10 minutes of the class, offering observations and comments related to conflicting interpretations of the problems, issues and solutions, and questions regarding unseen obstacles that students and the entrepreneur may face.

Team #1 discusses the <u>Individual-Centric</u> aspects of entrepreneurship. Their task is to identify the personal qualities that the entrepreneur brings to their new venture development, the entrepreneur's skills, the prospective entrepreneur's rationale for establishing the venture, and perceived strength of the new venture opportunity. Based on their analysis, they will offer three recommendations that will assist the entrepreneur in maximizing their personal assets and overcoming their personal challenges for developing their new venture.

Challenge Questions:

1. What personal qualities might lead you to believe that John could be a successful entrepreneur and why?

- What personal challenges may be more or less significant in their effects on John's new venture?

- Does John's venture development concept make sense-why or why not?

- Why does John believe that there is an opportunity for his venture to succeed and how is this substantiated or not?

- Based on John's personal profile, provide and substantiate three recommendations to maximize his personal assets and minimize his personal challenges.

Team #2 will review the case and discuss the Venture-Centric aspects. They will identify challenges and strengths associated with the proposed venture's financial record keeping, economics, daily operations, and its infrastructure (people, buildings, equipment, etc.). Based on their analysis, they will offer three recommendations that will assist the entrepreneur in developing or strengthening his internal operations in ways that support the new venture start-up.

Challenge Questions:

2. How does John's new venture infrastructure meet criteria for early stage start-up?

- What new venture infrastructure assets does John have at present?

- What new venture infrastructure assets does he need and why?

- Is John likely to prioritize some new venture infrastructure needs over others, and why?

- Based on John's infrastructure profile, provide and substantiate three recommendations to improve his new venture infrastructure and minimize his infrastructure challenges.

Team #3 will review the case and discuss the Context-Centric aspects of the proposed new venture. These include describing the entrepreneur's relationships with his buying publics and competitors, challenges and strengths related to the disability services systems that the entrepreneur may encounter, the marketing plan, customer buying process, financing and networks (of suppliers, mentors, other supportive relationships). They will also discuss apparent challenges to new venture development and capitalization generated by the systems that the entrepreneur must deal with related to having a disability. Based on their analysis, they will offer three recommendations that will assist the entrepreneur in strengthening their networks, markets, and leveraging financing needed to develop their new venture.

Challenge Questions:

3. What do you see as John's major environmental challenges to new venture creation and why?

- How significant in this case example, are environmental challenges related to John's disability?

- Is John's proposed new venture well positioned relative to accessing funds for start-up? Why or why not?

- What challenges related to John's disability affect his ability to negotiate the environments required for his new venture start-up?

- Based on John's environmental profile, provide and substantiate three recommendations to strengthen his environmental relationships and minimize his challenges working in an entrepreneurship environment.