Portland State University University Studies Senior Capstone

School of Business Administration BA495 BUSINESS STRATEGY Term: Sp14

Professor: William M. Jones
BA 495: CRN 60284, Section 006, Monday/Wednesday 5:40-8:30

Classroom: SBA 390
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Hours: Tuesday/Thurs (noon-5), Monday/Wednesday (10-3), by appointment
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Required Reading

- **Text:** Frank T. Rothaermel, *Strategic Management: Concepts*. ISBN-978-0-07-764506-9 (This is the second edition, which has significant revisions from the first edition. It is available at PSU Book Store & on-line)
- **Cases**: You have to purchase a course pack on-line from Harvard Business Publishing. GO TO THIS LINK TO SIGN-UP & PURCHASE COURSE PACK (Cost $15.80): https://cb.hbsp.harvard.edu:443/cbmp/access/26403440
  - Several additional articles will be posted on the D2L course site to download (these are free)
- **Capstone Student Handbook**: Each student is required to review the Handbook which can be found on-line at **http://www.pdx.edu/sba/capstone**

Supplemental Reading (depending on client & Optional)

- Bruce R. Barringer and R. Duane Ireland (2007). *Entrepreneurship: Successfully Launching New Ventures* (2nd Edition). Upper Saddle River, N.J.: Prentice Hall.
- Robert Gunn and Chris Durkin (eds.) (2010). *Social Entrepreneurship: A Skills Approach*. Bristol, Great Britain: The Policy Press.
- Peri H. Pakroo (2009). *Starting & Building a Nonprofit: A Practical Guide*. Berkeley, CA: Nolo.
- in D2L: Merrill Lynch (2000) *How to Read a Financial Report* Merrill Lynch, Pierce, Fenner & Smith, Inc., New Brunswick, NJ (Posted on Course D2L)

Course Overview

- Effective strategies lead organizations to *stand out*—for what they do and how they do it. One of the primary pillars of Portland State University's strategy is to develop students who can apply interdisciplinary learning to real world issues and become leaders of change. PSU's University Studies program is one of the ways that the University has consistently gained international recognition for a distinguished undergraduate experience.
- The University Studies capstone course contributes to this strategic pillar by seeking to enhance the lives of PSU seniors through service learning with partners in the community.

- The Business Strategy Capstone course is designed to provide an integrative experience along two dimensions:
    - 1) as a culminating experience for the University Studies program at PSU; and
    - 2) as a way for business students from different majors to combine their knowledge and work together to work in the field with an external partner on a pressing strategic issue.

Course Objectives

In this course, we will rely on business strategy frameworks to thoroughly analyze the client's strategic issues and formulate recommendations. The strategy content and the client project have been selected so our students can experience the key goals of the University Studies Program.

1. **Appreciation of the diversity of the human experience**: This means we will focus on diversity issues that are central to business success: embracing cultural differences, addressing the needs of varied stakeholders, and working through differences across team members
2. **Engage in effective communication**: Throughout your career, effective communication will be fundamental to your success, so we will practice both written and oral, and individual and team communication.
3. **Hone critical thinking skills:** Your client project will require you to thoroughly understand the client's problem, analyze pertinent data, and formulate recommendations. Working with a client will make this process very real and exciting
4. **Understand social and ethical responsibilities:** Businesses confront profound social and ethical issues in their pursuit of corporate social responsibility. Both through case analyses and the client work, you will need to weigh the social, environmental, and economic implications of your recommendations.

The following course objectives include notations about which University Studies goal(s) are embedded within that objective:

- To develop the ability to incisively apply and effectively communicate business concepts in practical application, including:
    - Conducting a comprehensive analysis of an organization, its industry, competitors, and general environment, and develop viable strategic alternatives. (communication, critical thinking)
    - Relating strategic management theory, concepts and frameworks to a partner organization that will serve as the client during the term. (appreciation of diversity, critical thinking)
    - Applying concepts to current news events. (communication, critical thinking)

- To develop abilities for assessing competitive environments and identifying value-creating opportunities in the global economy. *(appreciation of diversity, communication, critical thinking, social/ethical responsibility)*
- To acquire tools for judging performance, identifying changing industry dynamics, anticipating competitors' responses, and leading organizational and strategy evolution accordingly. *(communication, critical thinking)*
- To understand the levels of strategy creation spanning business unit-level and corporate-level decision-making. *(communication, critical thinking, social/ethical responsibility)*
- To recognize the viewpoints and influences of a variety of stakeholders during strategy creation. *(appreciation of diversity, critical thinking, social/ethical responsibility)*
- To understand how strategy formulation demands simultaneous decision-making along multiple dimensions involving innovation, functional areas, and external relationships. (communication, critical thinking)
- To engage in highly interactive analyses, where students push each other to their analytical limits in a respectful way and are encouraged to take risks, while also working collaboratively in a team-based setting. (appreciation of diversity, communication, critical thinking, social/ethical responsibility)

- To offer consultation services to the businesses that are our community partners in ways that further both the interests of that community partner and us, as we share and hone our expertise as business students from various majors (communication, critical thinking, appreciation of diversity, social/ethical responsibility)

Important Resources:

PSU LIBRARY: Should be your first stop when conducting research:
PSU Library now has a DIY (Do It Yourself) research guidance web-page that can be extremely useful to your project. Go to this site to begin your research (http://library.pdx.edu/diy/). There you'll find easy to use prompts to help you in your research.

DISABILITY RESOURCE CENTER:
Accommodations are collaborative efforts between students, faculty and the Disability Resource Center (DRC). **Students with accommodations approved through the DRC** are responsible for contacting the faculty member in charge of the course prior to or during the first week of the term to discuss accommodations. Students who believe they are eligible for accommodations but who have not yet obtained approval through the DRC should contact the DRC immediately at 503-725-4150.

THE WRITING CENTER: 188 Cramer Hall
The Writing Center can help with all varieties of projects including class assignments. The Writing Center aims to help writers at any stage of the writing process, from brainstorming to the final draft. Contact TWC: http://www.writingcenter.pdx.edu/index.php#; Phone: 503-725-3570;

Important Notes:

This class will be taught in a dynamic case-method format. Everyone will be expected to attend every class, contribute to class discussions (I will randomly call on students to comment), and visit the Client's operations. Do not search the internet to see "what happened" after the time of the case, because this could limit your thinking as to possible outcomes.

Laptop use during lecture is prohibited, unless you are using the laptop to take notes. [If that is the case, please see me for permission. In these circumstances, I'll ask that you email me your notes taken for the lecture for the first 4 class sessions.] *Exception*: on the days where we have client work, having a laptop within your group is helpful, but not essential.

Cell phones and mobile devices, PDAs etc. should be silenced and put away during class. If you routinely engage in texting, surfing or other device use during lecture, it sends a strong signal to the professor about your participation in class and your participation grade will be lowered to reflect this.

Course Grading:

Client Project: <See Appendix 1 for details>

- 30% Final Client Report with Strategic Recommendations
- 25% Client Presentations: each student will present a minimum of twice [Note: **passion** and **pictures** are essential!]
  [5% PESTEL+6 Forces; 5% VRIO+SW; 5% Financials; 10% Final Presentation to Client]

Preparation and Analysis of Readings:

- 10% Weekly short write-ups posted for weeks 2-8 to Desire2Learn (upload to D2L Drop-box folder Tuesdays by 11:30PM) <See Appendix 2 for details >
- 10% Reflective Essay on the 5 Course Goals in this Capstone. <See Appendix 3 for details >
- 5% Quizzes [Best 2 out of 3; no make-ups]
- 20% Attendance + Discussion Contributions in-class <See Appendix 4 for details >

Please send your instructor an email before class if you have to miss class

Final Grade Adjustment (THIS IS CRITICAL TO YOUR GRADE):

- Final grades will be adjusted based upon the following:

- Student Peer reviews/assessments: Mid-Term & End-Term assessment forms all students fill out evaluating the performance of their project teammates (peers).
- Professor's observations and assessment: focusing on student performance working with their project teams.

Students who disagree with scores on their individual written work have one week from the score posting to write a justification for a different score.

[Regarding Attendance + Discussion Contributions:
Grade of A: requires no unexcused absences and makes high quality contributions in every class;
Grade of B: requires no unexcused absences and participates often;
Grade of C: requires no unexcused absences and participates rarely;
Grade of D (or less): has one or more unexcused absence and/or does not participate.]

Readings and Assignments Required:
(bring answers to assignment questions to class for discussion)

(1) Cases and Readings: Course Pack – combination of on-line Harvard Business Cases (Obtain on-line see information above) & D2L (free)
(2) Frank T. Rothaermel, *Strategic Management: Concepts*.

Week	Topic	Case/Readings
WEEK 1		
Weekly Assignments • **No written assignment to hand in Week 1.** • Email to me your Client selection form by Friday		
1. March 31	**Introduction to course content, Client Organization, Course Goals (SBA & UNST)**	**Readings**: Syllabus and Materials for course project in course D2L sites **Project Assignment**: Read: (1) 3 clients' project overviews & Applications (D2L course site); (2) in D2L: The Syllabus; (3) Review D2L Course site (4) in D2L: Templates: Proposal, SOW, Progress Report, Final Rpt. (4) The Capstone Student Handbook: http://www.pdx.edu/sba/sites/www.pdx.edu.sba/files/Handbook-%20Student%20Capstone.pdf (5) Materials on the Business Capstone website: http://www.pdx.edu/sba/capstone
	UNST goal: Inquiry and Critical Thinking **UNST goal: Communication** IN CLASS (1) Bring your questions about the syllabus and client project.	
1. April 2	**What is Strategy?**	**Client**: Client speakers: senior managers from 3 client organizations • 6-6:45: Mission: Citizen (Michael Field, Stephen Griffith) • 6:50-7:35: Colonial Heights Presbyterian Church Pdx (Linda Stewart-Kalen) • 7:40-8:25: Smart Traffic Control Cones, LLC (Herb Jenkins, Craig Howard) **Text**: Chapter 1. What Is Strategy and Why Is It Important? Chapter 2. Strategic Leadership: Managing the Strategy Process **Readings**: in D2L: materials about clients
	UNST goal: Inquiry and Critical Thinking IN CLASS Work on Client Project	

	(1) Prepare questions for the client related to their project overview. (2) Research all of the clients online (their websites; competitor websites; etc.) (3) Please take notes on the overview provided by the senior manager from the client. The person will describe the pressing strategic issue that you will address as part of your business plan and strategic recommendation deliverable. Assignment Question tied to textbook reading (4) If you can find the following information online: analyze the clients' missions. How do the strategies followed by the client organizations appear to be influenced by their missions? What are the primary strengths and weaknesses of the clients' strategies? [At end of class, you will specify your preferences regarding the clients. The instructor will assign you to a client team to assure there is diversity on each team in terms of each business major.]	
WEEK 2		
Week 2: assignments • Short write-up #1 is due by 11:30PM Tuesday (upload to D2L folder for that write-up) • Email Weekly Project Progress Report to your client Friday (CC Professor) • Email Proposal to Client & upload to D2L SOW Folder (Saturday, April 12, 11:30PM).		
2. April 7	**Introduction to Client's Business**	**Readings**: • in D2L:: Review Client Applications • Research client & client business on-line • in D2L:: review Proposal, SOW, Progress Report Templates **Reading:** in D2L: "Groups are Fun and Not Fun.pdf"
	UNST goal: Inquiry and Critical Thinking IN CLASS Work on Client Project: How to Write a Proposal (1) Each team will need to develop a proposal (see Proposal Template in D2L) 1-2 paragraph(s) and prepare a bullet point of deliverables that will form the outline for the final report. (2) Class will review proposal & SOW templates & discuss preparation	
2. April 9	**What is Performance?**	**Client Assignment**: Prior to class the Instructor will email team assignments to all students. **Text**: Chapter 5. Competitive Advantage, Firm Performance, and Business Models **Cases**: Chemalite, Inc., HBS [9-177-078] **Reading:** in D2L: (skim it): "The Merrill Lynch Guide to Understanding Financial Reports 2000"
	UNST goal: Critical Thinking IN CLASS Work on Client Project: Each team will develop a summary and list of bullet points (PPt slides or project up your document if large enough to read). Each team members should talk through the bullet points that s/he will take the lead on. Assignment Questions (1) Which performance metric from Chapter 5 is most appropriate for each client? Why? (2) Which performance metric do you favor for assessing performance? (3) With your team, develop Chemalite's Balance Sheet for its first 6 months. [Note, people might have different ideas about the appropriate entries. Just form a quick consensus.] (4) With your team, walk through the transactions of the second 6 months in the Balance Sheet, Income Statement and Cash Flow statement. (5) Make sure everyone on the team is comfortable with these financial statements.	
WEEK 3		
Week 3 Assignments • Short write-up #2 is due by 11:30PM Tuesday (upload to D2L folder for that write-up) • Email Weekly Project Progress Report to your client Friday (CC Professor) • Email Draft Scope of Work to Client & upload to D2L Folder for Draft SOW		

(Saturday, 11:30PM)		
3. April 14		**no class: meet with client this week** **Project Assignment**: With your team, meet with your client (preferably at their operations) and walk through financial statements: 5-year pro forma income statement, balance sheet and cash flow for last year, and finalize Scope of Work. Search data sources to understand key performance metrics and industry-level data (from competitors; statistics; customer segment data; etc.) that would influence outcomes for your client.
	UNST goal: Inquiry and Critical Thinking **UNST goal: Communication** Work on Client Project (1) Create financials for client. (2) Outline key performance metrics given the scope of work. (3) Research important trend data that could influence client performance. (4) Sign final Scope of Work to hand to professor in next class. Post final Scope of Work both to D2L and email to Client.	
3. April 16	**Evaluating Environmental Opportunities and Threats**	**Text**: Chapter 3. External Analysis: Industry Structure, Competitive Forces, and Strategic Groups;] **Case**: in D2L: Tropical Salvage: From Recession to Expansion, Portland State University, School of Business Administration **Reading**: in D2L: Bloom and Chatterji, "Scaling Social Entrepreneurial Impact," *California Management Review*, 51:3, Spring 2009: 114-133 **Reading**: Porter, M.E., "The Five Competitive Forces that Shape Strategy," *Harvard Business Review*, Jan 2008: 2-17
	Course goal: Diversity of Human Experience **Course goal: Social and Ethical Responsibility** IN CLASS Assignment Questions (1) Analyze the 2 most important PESTEL elements for each client. (2) Analyze the 5 Forces + Complements for the furniture industry. (3) How well is Tropical Salvage positioned to survive the primary threats? And take advantage of opportunities running their own retail stores and offering new product lines? What additional opportunities might Tropical Salvage pursue? (4) Which SCALERS element is the most important for Tropical Salvage to scale as a social enterprise? Why?	
WEEK 4		
Week 4 Assignments: • External (PESTEL & 6-Forces) Project Team Presentation to Class/Client, Monday. ○ Email PPt slide deck to Client & upload to D2l folder by Tuesday, 11:30PM. • Short write-up #3 is due by 11:30PM Tuesday (upload to D2L folder for that write-up) • Final SOW email to client upload to D2L Final SOW folder, Saturday, 11:30PM. • Email Weekly Project Progress Report to your client Friday (CC Professor)		
4. April 21	**Evaluating Client's External Environment**	**Project**: Evaluate PESTEL and the "6" forces that influence the Client's industry by drawing on pertinent data. Analyze the biggest threats and the greatest opportunities. What would you recommend to the Client regarding its pressing strategic issue given these forces? **Client Presentation order (client will attend)** • 6-6:45: Mission: Citizen (Michael Field, Stephen Griffith) • 6:50-7:35: Colonial Heights Presbyterian Church Pdx

		(Linda Stewart-Kalen) • 7:40-8:25: Smart Traffic Control Cones, LLC (Herb Jenkins, Craig Howard)
	UNST goal: Inquiry and Critical Thinking **UNST goal: Communication** IN CLASS Work on Client Project (1) Each team will prepare their PESTEL and 6 forces analysis in a PPT slide deck, the primary threats and opportunities, and their recommendation to the Client. • Note: Focus on the PESTEL and "6" forces that are the MOST pertinent to the client. • Provide lots of data to back up analysis. Use data at the level of the client. (Include citations to the data and research.) (Each team member will present twice; the presentation is graded. All members of the same team get the same grade unless team members did not participate in the preparation & presentation.)	
4. April 23	**Evaluating a Firm's Internal Strengths and Weaknesses**	**Text**: Chapter 4. Internal Analysis: Resources, Capabilities, & Core Competencies + Chap 6 1-page highlight on Whole Foods (page 170) **Case**: Whole Foods: Balancing Social Mission and Growth, HBS [9-410-023] **Reading**: in D2L: Audio Recordings of interview with John Mackey (CEO Whole Foods)
	UNST goal: Social Responsibility IN CLASS Assignment Questions (1) How has Whole Foods created value for society? What are its primary strengths and weaknesses? How have their efforts to create social value led to business results? (2) How has Whole Foods grown while staying true to its social mission? For example, what organizational strategies, processes, and procedures have enabled them to balance these seemingly conflicting goals? Which resources and capabilities are VRIO? (3) In the last few years, would you say that Whole Foods is more about growth or its social mission? How does their support of practices such as the development of large-scale organic farms fit with their broader social ideology? (4) Assess Mackey's new model of "conscious capitalism." How does it relate to the Porter and Kramer reading? (5) What changes, if any, should Mackey make to Whole Foods's strategy going forward?	

WEEK 5

Week 5 Assignments:

- Internal (SWOT & VRIO) Project Team Presentation to Class/Client, Monday
  - After Presentation email PPt slide deck to Client; upload to D2l folder, by Tuesday, 11:30PM.
- Short write-up #4 is due by 11:30PM Tuesday (upload to D2L folder for that write-up)
- Email Weekly Project Progress Report to your client Friday (CC Professor)

5. April 28	**Evaluating Client's Internal Environment (SWOT & VRIO)**	**Project**: In the context of the Client's pressing strategic issue, evaluate the Client's relative to 1 competitor (each team for a particular client should choose a difference competitor). What would your team recommend to the Client regarding the capabilities it needs to acquire? Focus on: 1) the VRIO capabilities and related Core Competencies, 2) the resultant SWOT matrix, and 3) the key recommendations <u>from</u> this matrix; 4) additionally: what would your team recommend to the Client regarding the capabilities it <u>needs</u> to acquire? **Client Presentation order (client will attend)** • 6-6:45: Mission: Citizen (Michael Field, Stephen Griffith) • 6:50-7:35: Colonial Heights Presbyterian Church Pdx (Linda Stewart-Kalen) • 7:40-8:25: Smart Traffic Control Cones, LLC (Herb Jenkins, Craig Howard) [NOTE: in a future class, you will be asked to calculate how your recommendations will affect the Client's financials. Therefore, it is recommended to sketch these effects out as your complete your work scope.] Each team member should download and study the sample Final Report and financials from Desire2Learn if they have not done so already.
	UNST goal: Inquiry and Critical Thinking <u>IN CLASS</u> <u>Work on Client Project</u> With team create a PPT slide deck: (1) Identify the 5 key resources that would lead to capabilities and ultimately core competencies? Analyze by using the VRIO framework. (2) Assess how these core competencies will lead to competitive advantage for your client by doing a SWOT matrix that leads to strategic recommendations. (3) Assess your client's SWOT matrix relative to 1 competitor. How should you refine your recommendations based on the SWOT matrix given this assessment? (4) Provide specifics in terms of how the client will implement your recommendations (provide screen shots, etc., as examples). (Each team member will present twice; the presentation is graded. All members of the same team get the same grade unless team members did not participate in the preparation & presentation.) Note, for the financials due the next client work session, make sure everyone on your team understands the Breakeven, Profit and Loss, and pro forma Income statement from the sample Business Plan. Using the Client's data, start work on the Profit and Loss and Income statements.	
5. April 30	**Business-level Strategy**	**Text**: Chapter 6. Business Strategy: Differentiation, Cost Leadership, and Integration **Reading**: in D2L Lack of peripheral vision – How Starbucks failed in Israel, African Journal of Marketing Management

	UNST goal: Critical Thinking **UNST goal: Diversity of Human Experience** IN CLASS Assignment Questions (1) Do an external analysis and an internal analysis: what was the rationale for Starbucks entering Israel? (2) What were the fatal flaws in Starbucks's strategy in Israel? Include using the global strategy framework in Chapter 10 to depict their entry strategy vs. what strategy you would have advised them to use. (3) Consider your client's business-level strategy. What are the greatest flaws?	
WEEK 6		
Week 6 Assignments: • Short write-up #5 is due by 11:30PM Tuesday (upload to D2L folder for that write-up) • Email Weekly Project Progress Report to your client Friday (CC Professor)		
6. May 5	• **Cross-Cultural Diversity** • **Diversity in Teams and Communication**	**Text**: Chapter 10. Global Strategy: Competing Around the World *ONLY* section 10.3 the CAGE Distance Framework & Hofstede's Cultural Dimensions (pages 318-322) **In-class simulation: Exercise**
	IN CLASS	
6. May 7	**Business Strategy: Strategic Entrepreneurship**	**Text**: Chapter 7. Business Strategy: Innovation & Entrepreneurship
	UNST goal: Inquiry and Critical Thinking **UNST goal: Communication** IN CLASS Assignment Questions (1) Pick a framework in Chapter 7 to illustrate the most pressing threat and greatest opportunity for your client. How does this influence your recommendations?	
WEEK 7		
Week 7 Assignments: • Financials Project Team Presentation to Class, Monday ○ After Presentation email PPt slide deck to Client; upload to D2l folder, by Tuesday, 11:30PM. • Short write-up #6 is due by 11:30PM Tuesday (upload to D2L folder for that write-up) • Email Weekly Project Progress Report to your client Friday (CC Professor)		
7. May 12	**Evaluating Client's Financial Position**	**Project**: With your team, complete the list of start-up costs (if applicable), Balance Sheet, Cash Flow, and pro-forma Income Statement for the next 5 years, as well as the Breakeven analysis, using the Client's data. **Client Presentation order (client will attend)** • 6-6:45: Mission: Citizen (Michael Field, Stephen Griffith) • 6:50-7:35: Colonial Heights Presbyterian Church Pdx (Linda Stewart-Kalen) • 7:40-8:25: Smart Traffic Control Cones, LLC (Herb Jenkins, Craig Howard)
	UNST goal: Inquiry and Critical Thinking	

	UNST goal: Communication IN CLASS Work on Client Project (1) Be prepared to present your client's start-up costs (as applicable), and financial statements. Note, that it is recommended that you create monthly entries for the first year in the income statement and cash flow statement, and then annual entries for the subsequent 4 years. Create a PPT slide deck. (2) How do your emerging recommendations play out in the financials? (Each team member will present twice; the presentation is graded. All members of the same team get the same grade unless team members did not participate in the preparation & presentation.)	
7. May 14	**Corporate Strategy: Alliances**	**Text**: Chapter 8. Corporate Strategy: Vertical Integration and Diversification Chapter 9. Corporate Strategy: Mergers & Acquisitions, Strategic Alliances (Focus on Strategic Alliances section of chapter) **Case**: In D2L: Better World Books: Social Entrepreneurship and the Triple Bottom Line, Georgia Tech
	Course Goal: Ethics and Social Responsibility IN CLASS Assignment Questions (1) What do you think about the Mission statement of Better World Books (BWB)? (2) What is their Business Model? Is it ethical? (3) Search the Internet for information on a B-corp and measuring the Triple Bottom Line: is BWB fulfilling these goals? (4) What are the creative ways that BWB manages its value chain? (5) Lay out the incentives for contributions. Are these win-win relationships? (6) What role have strategic alliances played in the success of BWB? (7) What strategic alliances or other relationships across company boundaries would you recommend to BWB in order to: 1) ensure growth; 2) set up a migration path for BWB's business model given the threats it faces? (8) Stepping back, please synthesize this case and if you were the CEO, which part of your current strategy would you concentrate on? Which part would you change given the major threats (and opportunities) that exist?	
WEEK 8		
Week 8 Assignments: • **EXTRA CREDIT**: Last Short write-up #7 is due by 11:30PM Tuesday (upload to D2L folder for that write-up) • Email Weekly Project Progress Report to client end-of-week, Friday, (CC Professor)		
8. May 19	**NO CLASS (FIELD DAY)** **Client's Ecosystem and remaining issues**	**FIELD DAY: no class: meet with client this week** **Project**: Visit Client's operations or someone in Client's ecosystem and talk with Client about remaining issues.
	UNST goal: Inquiry and Critical Thinking **UNST goal: Communication**	
8. May 21	**Corporate Strategy: Alliances**	**Text**: Chapter 10. Global Strategy: Competing Around the World (Focus on pp.322-327 and understand Exhibits 10.5 & 10.6) **Case**: Grupo Bimbo, HBS [9-707-521]
	Course Goal: Diversity of Human Experience: Cross-Cultural Differences Assignment Questions	

	(1) Bring your laptop if you have one with your PPT slides for the below loaded, or save your PPT to Google Drive so you can easily access it. (2) Assume you are a country manager for Grupo Bimbo and you are presenting your strategic recommendations to the Board of Directors. Choose to represent Grupo Bimbo's operations in either the U.S., Brazil or China. (3) Create 1 PPT slide with your primary recommendations for sustained competitive advantage for your country's operations. (4) Create 1 PPT slide with the data/analysis from the case that backs up each recommendation. Consider our main frameworks of: PESTEL, 6-Forces, VRIO capabilities, SWOT, business-level and corporate-level strategy in guiding your analysis. (9)	
WEEK 9		
Week 9 Assignments: • UNST Reflection Essay assignment upload to D2L Tuesday, 11:30 PM • Email Weekly Project Progress Report to client Friday (CC professor). This is the last progress report you will submit to client • Draft Final Rpt: email to client by Saturday, 11:30PM; upload draft to D2L Draft Rpt Folder		
9. May 26	**Memorial Day Holiday**	**NO CLASS**
9. May 28	**Work on Final Report Draft**	**Project**: Each team will meet with professor and walk through final report, final presentation, and any remaining issues.
	UNST goal: Critical Thinking, Communication	
WEEK 10		
Week 10 Assignments: • Final Presentation PPt: email slide deck to Client no later than Tuesday, 11:30PM; upload to D2L Tuesday, 11:30PM		
10. June 2	**UNST goal: Inquiry and Critical Thinking** **UNST goal: Communication**	**Dry Run of Final Presentation**
10. June 4	**UNST goal: Inquiry and Critical Thinking** **UNST goal: Communication**	**--Presentation to Client (business attire)** **--Final Presentation Slides prior to presentation submit to client (email & bring 1 hardcopy to presentation). For instructor upload PPt slides to appropriate D2L folder.** **Client Presentation order (client will attend)** • 6-6:45: Mission: Citizen (Michael Field, Stephen Griffith) • 6:50-7:35: Colonial Heights Presbyterian Church Pdx (Linda Stewart-Kalen) • 7:40-8:25: Smart Traffic Control Cones, LLC (Herb Jenkins, Craig Howard)
WEEK 11 – EXAM WEEK		
Week 11 Assignments: • FINAL REPORT with Appendices: Ideally deliver to client day of Final Presentation. If need more time, Final Report must be submitted to Client & Instructor no later than Wednesday, June 11 (*post Final Report & all appendices to D2L folder and email to Client's email address*)		

11. June 9-13 (TBD)	**IF NEEDED:** **UNST goal: Inquiry and Critical Thinking** **UNST goal: Communication**	**--Presentation to Client (business attire)** **--Final Presentation Slides prior to presentation submit to client (email & bring 1 hardcopy to presentation). For instructor upload PPt slides to appropriate D2L folder.** **--Final Report submitted to Client & Instructor no later than Wednesday, June 12 for All Teams** (***post Final Project and Presentation to D2L folder and email to Client's email address***)

Admittance to this course: If you miss class sessions 1 and 2, you cannot take this course.

Academic Honesty: Students will uphold the honor code in all work associated to this course. All work must be original and non-original work should be appropriately referenced. Copying material from the internet or any other source without proper citation is considered plagiarism and cheating and will receive a failing grade. For more information regarding PSU's policies on behavior and academic honesty, please see: http://www.pdx.edu/dos/psu-student-code-conduct

For your information:

The SBA provides academic advisors as well as career and internship advisors to assist students in making the most of their collegiate experience. Academic advisors are trained to provide counsel in a wide range of issues. From selecting a business major to evaluating transferred transcripts, academic advisors are here to help students with all of their degree related questions. The following is a brief summary of the type of issues with which academic advisors can offer assistance

DARS reports / SBA admissions requirements / Major selection and requirements / Transcript evaluation / Course overrides / Transfer credit petitions / Career planning / Portland State rules and policies

In addition to academic advising, the SBA provides career and internship advisors to assist students in landing a job upon graduation or a summer internship while students are still in pursuit of their degree. Career and internship advisors can also provide resume and interview guidance.

All SBA advisors are available by appointment, which must be scheduled in advance. Drop-in hours are available as well. Drop-in hours are held regularly throughout the week and are designed to help answer routine or simple questions. For more information about SBA advising and drop-in hours please visit the School of Business website at http://www.pdx.edu/sba/ and click on student resources.

Appendix 1

Client Project: Business Plan and Strategic Recommendation Products

THIS IS 30% OF YOUR ENTIRE GRADE

Working with an interdisciplinary team, you will develop a business plan (OR RELATED DELIVERABLE) for the external Client around a pressing strategic issue identified by the Client. After the second-class session, you will be assigned a team with members who represent a cross-section of the business majors.

The team will produce a written report and a final presentation that make clear recommendations depending on the Client's scope of work.

Client Project Deliverables (mandatory):

During the term the project team will prepare several products (or deliverables) for the client based upon a written & approved scope of work. At a minimum the mandatory products will include the following:

- Proposal (see example Proposal template in D2L template folder): short (1-2 pages) proposal on what team proposes to do for project based upon what client wants and term length. This will be done before the scope of work will be developed.
    - Draft proposal will be sent to Client for review & comment
    - Team will revise according to comments.
- Scope of work (SOW) (see example SOW template in D2L template folder): this is a detailed outline of the tasks the project team will undertake based upon the proposal. SOW is a recipe for the work & includes a numbered list & description of all the tasks, any deliverables from the task & the schedule that the deliverable will be sent to the client.
- Final Report (see example report & example report template in D2L Templates folder): body of the final written report should be approximately **20-25 pages (it can be longer if you think necessary). The body of the report does not include,** executive summary, Table of Contents, references, or appendices. Reports should be typed and organized using subheadings for easy reference. Text not including headings and labels should be 11 point font, single spaced with sub headings
    - Make sure to cite all data and sources for quotes, chart data, etc. Follow the convention of: (Last name of source, date) in the text and use citation examples in BA495 library resource page for full citations in endnotes.
    - Draft of the final report must be sent to the client for review & comment before finalizing the final report (assume 1 week for client review)
    - Completed final report to be submitted to client electronically
- Final presentation (see example PPt master slide template in D2L template folder): PPt slides and handouts to be prepared, each team member should present for approximately 4 minutes.
- Weekly Progress reports (see progress report template in D2L template folder): these will be emailed weekly (it should always be the same day) to the client beginning Week 2 after teams are created and ending Week 10.

Client Interim Project Deliverables (potential):

It is very likely that you will also have "interim deliverables" the team submits to the client. What they are will be based upon the specific work outlined in the SOW. The advantage of an interim project deliverable is you can use that information in the final report (see below). Potential "interim deliverables" could include the following:

- Technical Memoranda or TM (see TM Template in D2L template folder): actual content of the TM will depend on the SOW. Some examples may be technical memoranda on competitor's analyses, SWOT, PESTEL, market demand, financial forecasts, ROI, market plan, supply chain & logistics, etc. You will not have to finalize the TMs. They are for your

client to comment on. Client comments should be incorporated into your final report.

- Excel Spreadsheet Analysis (See several examples of different excel templates): actual content of spreadsheet will depend on the SOW. Financial information may include spreadsheet analyses such as financial forecasts, accounting, revenue forecasts, balance sheet, ROI, etc. You will not have to finalize the spreadsheet analysis. They are for your client to comment on. Client comments should be incorporated into your final report.
- Interim Presentations: Interim Presentations (PPt slides) may include financials, SWOT, PESTEL, Competitor's analysis, etc. Any PPt slides are simply for your client's record and are not for client comment.

Deliverable Deadlines (mandatory & potential):

- Proposal (mandatory): to be submitted to client & instructor end of week 2
- SOW (mandatory):
    - Draft SOW to be submitted to client & instructor end week 3 for review/comment
    - Final SOW to be submitted to client & instructor end week 4
- Final PowerPoint presentation (mandatory): needs to be posted to D2L before the presentation to the client. Bring 1 hard copy for the client.
- Final Report (mandatory):
    - Draft Final Report: email digital copy to client no later than Week 9 (see assignment section for exact date) for review. Allow a week for review/comment. Finalize report based on client comments.
    - Final Report: Ideally submit to client day of presentation (email to client & bring 1 hard copy to client on day of Presentation, Week 10). If unable to submit final report day of final presentation, email to client and upload to D2L folder for instructor no later than Week 11 (see assignment section for exact date).
- Weekly Progress Reports (mandatory): email to client & post on D2L for Instructor on the same day weeks 2-10
- Technical Memoranda (potential): delivery date(s) to client & instructor will depend on the schedule in the SOW. TMs to email to client & upload to D2L for instructor.
- Spreadsheet Analysis (potential): delivery date(s) to client & instructor will depend on the schedule in the SOW. Spreadsheets to email to client & upload to D2L for instructor.
- Interim Presentations (mandatory): Presentation Topics (PESTEL, VIRO, Financials) & dates have been identified & scheduled, but actual topic & schedule will depend on project SOW. All presentation PPt slides will be emailed to client & uploaded to D2L for instructor PRIOR TO PRESENTATION DATE. 1 hard copy of PPt slides will be handed to client at Presentation.

Typical Business Plan Elements

Typical elements of a Business Plan are as follows. (NOTE THAT YOUR FINAL REPORT MAY HAVE VERY DIFFERENT ELEMENTS DEPENDING ON THE CLIENT'S SCOPE OF WORK.)

See example previous BA495 final report and template is in the D2L Templates folder.

I. INTRODUCTION:

- **Cover Page** – *The cover page should clearly state all members of your group alphabetically, the client's organization, and the date. Please do not go to the time and expense of "fancy" binding and coverings, the report needs to be stapled in the upper left-hand corner with the cover page on top.*
- **Table of Contents** – *lists all major sections (headings & sub-headings) of the report by page number. List Appendices by Name in order of inclusion & can be either numbered or use alphanumeric (A,B,C…Z). They can include your Interim deliverables (the Technical memoranda, financial analysis, surveys, etc.) or other research you have completed.*
- **Table of Tables***: – not needed unless you have many tables, then list tables included in the*

body of the report by page number.

- **Table of Figures***: – not needed unless you have many figures & graphs, then list figures & graphs included in the body of the report by page number.*
- **Executive Summary** – *Provide brief summaries of each area covered in the body of your plan with the primary recommendations (try to keep to one page). The purpose is to provide a quick overview for easy reference and to create interest and "excitement" for the reader to continue into the specifics of the report. The executive summary should be written after the body of the report is completed.* ***Each paragraph is similar to a "journal abstract" and should be an informative summary of the critical recommendations of each section.***
  - State the overall key strategy problem or issue/opportunity that the client is facing.
  - One-paragraph summaries of each area covered in the body of your plan with the primary recommendations: Company Description, Management, Marketing, Financial, and Strategic (try not to be longer than a single page).
  - Lastly, you state your overall recommendation for the client and that the rest of the analysis serves to support this recommendation.

II. BODY: (below means: include if appropriate and create a chart in an appendix in addition to the FULL narrative)*

The actual content of the Final Report will depend on your SOW. The purpose of the final report is to integrate the work you did during the term into a consistent, rational, and understandable document whose logic justifies the recommendations you identify. The reader may not agree with your recommendations but by reading the final report they will understand how you came to those recommendations. You do this by drawing on the research, analysis, and findings you conducted over the term and the interim deliverables you submitted to the client.

Below are some guidelines for content.

- **Overview of client's primary issues addressed in the report**. Also include a brief history of the client's organization. You can use the materials from your Proposal, which becomes the first two sections of the SOW.

- **Company Description and Management Plan:**
  - *Vision, Mission, Strategy [this information may be in your Proposal & SOW]*
  - *Organizational Structure **
  - *Human Resources (Wages and Benefits)**
  - *Production Process* (PERT-program evaluation and review technique-diagram of process or schedule that is repetitious for the Client's organization – example: restaurant – daily schedule, remodeler – job schedule, financial planner – client meeting etc.)*
  - *Facility Layout* (if you are suggesting a change to their current operations)*

- **Industry Analysis and Market Feasibility**: Based on the External and Internal presentations in class.
  - *Target Markets Focusing on Client's Strategic Issue (RESEARCH – should have 5 –10 "cited" sources)*
    - *Primary issues in External Environment and resultant Threats and Opportunities (only include dimensions from PESTEL and 5 Forces + Complements that are pertinent)*
    - *Go beyond static analysis. If there are cycles in the industry or key events that affected some competitors more than others, note these.*
  - *Business-level Strategy*
    - *Industry size, projected growth, possible sales growth*
    - *Industry structure and pertinent strategic group for client*
  - *Competitor Analysis*
    - *Analyze top competitors relative to client (include: how does the client's SWOT compare with their top competitor)*
    - *Primary issues from Internal Analysis (which resources/capabilities does the client has/needs that would provide truly VRIO and lead to strengths for sustained competitive advantage)*

- **Marketing, Operations, and Sales Plan**
  - *Product/Service Characteristics (description) & Pricing Strategy*
    - *Status of product/service*
    - *Primary risks in market entry and expansion*
  - *Promotional Plan (Promotional mix and budget)*
    - *Market segmentation and buyer behavior*
    - *Marketing collateral: website content, brochures, etc.*
  - *Operations*
    - *Procedures, location, facilities, equipment*
  - *Distribution*

- **Financial Plan:** Based on Financial Analyses presented in class. Possible helpful resources: http://www.score.org/resources/business-plans-financial-statements-template-gallery
  ***create a chart where the key elements and projections are explained in the text.*
  - *Feasibility: How much money does the Client need and how do you propose to get it? Overall how will this client be successful and why (last part of this section written – include breakeven and costs)*
  - *Projection of anticipated costs at start up** (research – cite your sources: e.g., costco.com and catalogues)*
  - *Pro Forma Income Statement, Balance Sheet, Cash Flow for first 5 years, with monthly income statement and cash flow broken out in first year***
  - *Break even projections** (refer to text and www.JavaCalc.com)*
  - *Scenario(s).*

- ***Conclusion**:*
  - *Strategic Recommendations – What should the client do and why regarding its pressing strategic issues?*
    - *Short term (one year or less), intermediate (2 - 5 year) and long range (5+ year) goals. These are GOALS – Small, Achievable, Measurable and Specific.*
    - *Conclude along the lines of: "Considering the alternatives presented in this report, the consulting team recommends the following strategies be pursued: (provide a bulleted list of your key recommendations)."*
  - *If your team identified additional strategic issues that the Client should address in the near term, present your analysis.*
  - *Also present your analysis of Corporate-level strategy opportunities regarding Vertical Integration, Diversification, Strategic Alliances, Networks, Acquisitions, and Geographic Expansion over the next 5 years if not in the scope of work but your team identified attractive opportunities in any of these areas.*

- ***ADDITIONAL ATTACHMENTS:***
  - *Appendices – All charts, tables, graphs, etc.*
  - *Bibliography & References (can be either in the form of EndNotes so numbered as appeared in text or alphabetical). I will expect at least five DIFFERENT secondary sources to be utilized, credited, and cited in your report. DIFFERENT means five various sources (i.e. all web sites count as only ONE source). Possible sources include Internet, competitor information, brochures, personal interviews, marketing collateral, periodicals, newspapers, and books (one or more of each type – often students have a total of 5 or more sources within each "type").*

[Acknowledgement: This project was adapted from a course project developed by PSU Professor Brenda Eichelberger and includes content from Barringer, Bruce R. (2009). *Preparing Effective Business Plans: An Entrepreneurial Approach*, Upper Saddle River, NJ: Pearson/Prentice Hall.]

Group Project Work & Handling of Any Group Conflicts

Team members will be collectively responsible for completing each of the Capstone assignments and the grades earned on the client project will be assigned equally to each group member and weighted by team evaluations.

I recommend that each team elect a "Project Manager" (PM) to direct the development of the various components of the project work, organize team meetings, help lead team discussion and communicate with the professor & client. The role of PM can be rotated every week, so all team members can play this role throughout the term.

Don't be a free rider on the project. You likely have been on teams where someone did not fully contribute to the project, but expected the same grade as those making a strong contribution. **Therefore, strong contributions to projects, showing a collaborative attitude, regular attendance both in class and at team meetings are essential for optimal grading.** In situations where someone is consistently not sharing in the responsibilities of the project, or delivering poor quality and/or late work to the group members, it is essential that others on the team help the person understand what issues exist and have everyone on the team brainstorm possible solutions. If I can be of any help in overcoming team-related issues, step 1 is for all of us to meet and sort things out. Step 2 is a follow on meeting to make sure things are better.

Appendix 2

Short write-ups: Synthesis of Readings

THIS IS 10% OF YOUR ENTIRE GRADE

UNST goal: Inquiry and Critical Thinking
UNST goal: Communication

The short write-ups are to be prepared for weeks 2-8 & are due by:

- **11:30PM on Tuesdays. Upload to D2L Drop-box folder for week due. Late submissions will not be accepted.**

The short write-ups will be graded as follows:

- Superficial = 1
- Adequate = 3
- Superb = 5

Synthesis of the Readings for the day and Application
In addition to preparing the assignment questions for each class, which can be found below, please post short responses to the drop-box folder for that week's assignment in the course's Desire2Learn site.

The purpose of these postings is to have you step back and formulate a summary view of the material and link the course material to current events. PLEASE FOLLOW THIS FORMAT:

(1) *First paragraph define the concept(s) from the reading or class discussion IN YOUR OWN WORDS (do not quote the concept from the book or any source you use).*
(2) *Next paragraph(s) apply the concept(s) to your client, the readings, or class discussion(s). Make sure you focus on the strategic implications of how or why the concept(s) is/are relevant **or** not relevant to your application.*
(3) *Next paragraph(s) apply the concept(s) to a current business issue in the news from the last 6 months. Make sure you focus on the strategic implications of how or why the concept(s) is/are relevant **or** not relevant to your application.*
(4) Finally, cite the news source for the current business issue.

The purpose of these short write-ups is to allow students to practice applying strategy constructs to real-world situations. Students should become masterful at relating strategic management theory, concepts and frameworks to current events while understanding the implications of these events for business practice.

Instructions for posting the Short write-ups:

(1) Go to the Desire2Learn site for the course
(2) Post in appropriate drop-box folder for the class session

Again, your Short write-up is **in addition** to your extensive *preparation of the assignment questions* for each class, which will form the basis of our class discussion. You do not have to hand in your analysis of the assignment questions, but please have your Short write-ups and your answers to the assignment questions ready to discuss both in class.

Additional Information on Student Access to Desire2Learn:

Students registered under the CRN for this course will be automatically added to the Desire2Learn site. Each student needs an ODIN account to be added to the course. The students' Desire2Learn ID will be the same as their ODIN username and their password will be the last four digits of their PSU Student ID number.

Appendix 3

Reflective Essay

THIS IS 10% OF YOUR ENTIRE GRADE

University Studies Goals as Experienced in the BA495 Business Strategy Capstone Course
Choose one from the Two Following Options

Requirements for either assignment:

- 3+ pages, 1.5 spacing, 11 pt Arial font

Due:

- upload Week 9 (see Week 9 assignment for exact date/time) to the D2L drop-box folder designated for the essay.

INTRODUCTION TO THE ASSIGNMENT:
The purpose of the Capstone is to serve as the culminating general education course at PSU allowing, students to apply academic learning to address a real issue in our community. The Capstone has four goals: communication, critical thinking, diversity of human experience, and social and ethical responsibility.

Select from the two Options described below.

OPTION 1: REFLECT ON YOUR COURSE EXPERIENCE RELATED TO ANY OR ALL 4 UNST GOALS
The University Studies program has four goals that serve as the cornerstones around which each University Studies class is designed: Inquiry and Critical Thinking, Communication, Appreciation of Human Diversity and Ethical and Social Responsibility, defined as follows:

1) ***Inquiry and Critical Thinking:*** able to: develop and utilize decision criteria for problem/opportunity identification, utilize appropriate data sources, use analytical tools and quantitative evaluation techniques, and select and present a solution consistent with identified decision criteria.
2) ***Communication:*** able to communicate clearly for a variety of purposes and to diverse audiences; written and oral output is marked by lucid and orderly thinking, substantial depth, fullness and complexity of thought.
3) ***Appreciation of Human Diversity:*** "diversity" refers to differences in ethnic, religious, and cultural perspectives, class, race, gender, age, sexual orientation and ability; able to view issues from multiple perspectives, to question what is being taught, and to construct independent meaning and interpretations; demonstrates broad awareness of how the self (you) appears from the greater perspective of human experience, questions own views in light of this awareness, and contemplates its implications for life choices in the personal and public spheres.
4) ***Ethical and Social Responsibility:*** creatively and comprehensively articulates approaches to ethical issues and social responsibility, in a scholarly manner, citing specific evidence; demonstrates an ability to view multiple sides of these issues, to question what is being taught, and to construct independent meaning and interpretations.

To help you frame your essay, please consider the following:

- Imagine someone from PSU has selected you to speak to the four University Studies goals from your own lived experience in this Capstone class. What connections can be made between your lived experience in this course and those four goals?

You may consider these questions to craft your 3-PLUS page reflective paper addressing how you enhanced your approach to the four areas:

- From my own lived experience, how did engaging in the community project for this course enhance my abilities in the four goal areas?
- How have the structure of this course, the assignments, the tasks of this class, and/or our class discussions enhanced my ability to analyze community issues from diverse perspectives?
- How has my work as a team member given me insight into collective problem solving, communication, and recommendation formulation?
- How does this process of self-reflection enhance my ability to critically think about my beliefs and attitudes towards the real world issues we addressed in this class?
- How has the production of the inputs into the final project for the client allowed me to expand and practice my skills in the goal areas?
- How have the readings and in this class furthered my skills in the goal areas? What new insights and understandings have I gained through the required reading of this course?

As you craft your 3-PLUS pages, remember to write from your own experience with I/me/my language. It will be important that you generate your observations and experiences with detail. You can draw on frameworks from prior classes to shape your essay. As you write, ask yourself *how do I claim this to be true?* Be sure the content of your essay reflects those claims.

OPTION 2: REFLECT ON YOUR COURSE EXPERIENCE RELATED TO THE UNIVERSITY STUDIES ETHICAL AND SOCIAL RESPONSIBILITY GOAL

Every year University Studies selects a specific goal to assess in more depth and detail. This year the Capstone program is creating a portfolio to showcase the ways in which the Capstone Course provides evidence of students' capacities to understand, analyze, and appreciate the *Ethical & Social Responsibility Goal* in the context of their coursework. Therefore, the purpose of this assessment is to capture the wide variety of ways that students come to learn about ethical & social responsibility through direct interactions and indirect service to a variety of populations.

If you select this option, University Studies would like you to consider participating in their ongoing research of this goal by submitting your essay. It is important to know that:

- Participation is completely **voluntary**,
- Participation has absolutely no impact on your grade,
- All participant's names will be kept confidential, and
- If excerpts from your essay are used in publications or presentations, any information that can identify you or be linked to you will be kept confidential.

Please review the Student Consent Form posted on D2L under the course content folder labeled University Studies Consent Form. If you agree to select this option, please:

- Download the consent form
- Fill-out the form
- Upload Student Consent Form to D2L Drop-box folder for Consent Form by Tuesday, May 27, 2014.

Specific Instructions related to Ethical & Social Responsibility Goal Essay

In Capstone courses, students apply the expertise learned in the classroom to address real issues in the community. Each Capstone course should further students' sense of social responsibility and ethical reasoning. Through their community interactions, students prepare for public lives as citizens, members of communities, and professionals in a complex society (http://www.aacu.org/value/rubrics/pdf/civicengagement.pdf). The purpose of this assessment is to capture the wide variety of ways that students come to learn about social responsibility and ethical reasoning through direct and indirect service to a variety of communities.

Prompts To Help You With The Essay:

- Reflect on their personal efficacy to make a difference in lives of others in their local or global community through direct contact with community members (i.e. mentoring/tutoring youth, interacting with senior citizens, assisting refugee resettlement, documenting oral histories) and/or indirect service activities (i.e. grant writing or creating marketing plans for a non-profit organization).
- Analyze new insights regarding the root causes of social and environmental issues (such as poverty, homelessness, hunger, or environmental degradation), developed as a result of working with and/or learning about community issues.
- Examine grassroots efforts to change the structures which create or perpetuate social and environmental problems.
- Reflect on how their own perspectives have changed or developed in relationship to the community issues addressed as a result of the Capstone experience.
- Consider the impact of their individual choices on broader societal issues (i.e. global warming, homelessness, poverty). This may include an examination of a wide variety of behaviors including everyday decisions, career choices, and political action.
- Reflect on their role and responsibility as citizens to actively participate with others towards a public purpose (common good).
- Apply technical skills (marketing, science research, business, graphic design) in the community in order to address social issues and/or serve the common good. This may include reflections about scientists as engaged citizens, the importance of corporations' responsibility to serve the public good, and/or professional ethics and responsibility.
- Examine the systemic structures in society that create or perpetuate social problems.

Appendix 4

Discussion Contributions

THIS IS 20% OF YOUR ENTIRE GRADE

UNST goal: Inquiry and Critical Thinking
UNST goal: Communication

A central part in developing your inquiry, critical thinking and communication skills will be active and thoughtful contributions to the class discussion. *Your contributions will be critical in refining your managerial and presentation skills, as well as to your learning and the learning of your classmates, so everyone is expected to participate in each class session*. I usually ask for volunteers, but I also cold call people throughout the class session.

In evaluating class contributions, I consider both quality and the frequency of contribution, but I weigh quality more heavily. *In assessing quality*, I consider the following dimensions:

- Is the student taking risks?
- Is the student creatively trying to experiment with strategic thinking and visioning?
- Does the comment simply repeat facts from the case, or does it provide analysis that adds to our understanding of the case and its broader implications?
- Does the comment fit well into the flow of the discussion? Is it linked to the comments of others?
- Does the comment trigger others to enter the analysis?
- Does the comment link the case material effectively to the material from the textbook?
- Does the comment reflect creative thinking, perhaps by tying together multiple viewpoints or tying back to material covered previously in the course?
- Is the comment presented in a clear, compelling manner or is it confusing, repetitive or contradictory?
- Is the comment delivered in a respectful, constructive tone?

In making my overall assessment of class participation, the overarching criterion is "*How significantly did this student's contributions add to the learning of the class as a whole?"*