



Academic Program Review

DUE DATE: November 21, 2018

The HLC Criteria for Accreditation, specifically Core Component 4.A, require institutions to maintain a “practice of regular program review¹” as one component for ensuring the quality of our educational programs and evaluating our effectiveness in achieving our stated student learning outcomes. For academic units, “Program” means an academic School.

School:	Lukenda School of Business
Degree Programs of the School: (indicate which, if any, hold specialized programmatic accreditation)	Accounting – B.S.* Business Administration – B.S. Business Administration – Entrepreneurship – B.S.* Business Administration – International Business - B.S.* Business Administration – Management – B.S.* Business Administration – Marketing – B.S.* Finance and Economics – B.S.* Small Business Administration - Associate Technical Accounting – Associate * Accredited by the Accreditation Council for Business Schools and Programs (ACBSP)
Academic Program Review Submission Date:	
Dean:	Kimberly Muller, Ph.D.
School Chair:	Mindy McCready
Names of Faculty Members Completing Program Review Report:	Mindy McCready Robert Boston Marta Diaz Valerie Philips Jody Rebek Gerald Root Madan Saluja Ralf Wilhelms

¹ <https://www.hlcommission.org/Policies/criteria-and-core-components.html>

Guidelines for Completing the Academic Program Review

Questions in Part 1 are focused at the School level, and should reflect School-level data, findings, etc.

Questions in Part 2 should be completed for each distinct academic degree program in the School. In the cases where an academic degree holds specialized programmatic accreditation, Schools can cite the page(s) which address the prompt question. In all cases, attach evidence where available using the appendix cover sheet to identify how the evidence supports the relevant criteria or prompt.

PART 1: School-Level Review

School Mission and Goals

1. Provide the School's mission statement and explain its connection to the University mission.

The Lukenda School of Business (LSB) mission statement is as follows:

Through dedication to excellence in teaching, the Lukenda School of Business develops students to become economically, socially, and environmentally responsible, and empowers them to become business and community leaders in a global society.

When developing this statement, LSB faculty and staff placed great importance on aligning it with the mission of the University. The LSB focuses on providing students a personal education through small class sizes, faculty and student interaction and experiential learning in order to develop the knowledge and skills necessary to succeed in their academic and professional careers. Through rigorous course work, real-world assignments and service learning opportunities, LSB students are challenged to reach their full potential in order to realize self-fulfillment while positively impacting the communities in which they live and work.

2. List the School-level goals and explain how they support and connect to the CAFÉ Master Goals of the Strategic Plan.

<https://www.lssu.edu/wp-content/uploads/2018/09/2018-2023-LSSU-Strategic-Plan.pdf>

In 2013, LSB faculty and staff established seven strategic goals when creating the School's five-year strategic plan. Although LSB's strategic goals were developed to align with LSSU's strategic plan that was in place at the time, they still relate to LSSU's current CAFÉ Master Goals as follows:

Culture

CAFÉ Master Goal: We cultivate an environment of inclusion where all members treat others with dignity and respect.

LSB Strategic Goal: Collaborative, Committed Learning Community - LSB will develop a permanent and permeating culture of sharing ideas, knowledge, resources, and talent, fostering a sense of pride and community.

CAFÉ Master Goal: We cultivate open communication, engagement, and behaviors that strengthen community, across campus and in the wider region.

LSB Strategic Goal: Student Experience - LSB will provide students with a supportive and connected experience to enhance student development.

Academics

CAFÉ Master Goal: We will cultivate programs that support individual growth within the curricular, co-curricular, and non-curricular realms culminating in degree completion and endorsement of lifelong learning.

LSB Strategic Goal: Student Learning and Development - LSB will maintain and develop excellent programs for students which provide experiential learning activities that capitalize on this unique region.

CAFÉ Master Goal: We will cultivate student educational experiences that add value and allow students to reach their full potential.

LSB Strategic Goal: Educational Support - LSB will establish and maintain an appropriate level of educational resources to effectively support learning.

Finance

CAFÉ Master Goal: We will cultivate a culture of continuous improvement through accountability and sustainability practices, regular financial reviews, and periodic reporting.

LSB Strategic Goal: Stewardship and Sustainability - LSB will promote efficient and effective utilization of resources to lay the foundation for growth and sustainability.

Enrollment

CAFÉ Master Goal: We will cultivate, maintain, and support an enrollment management strategic plan that will center on programs and activities that reach enrollment goals.

LSB Strategic Goal: Desirable School of Choice - LSB will attract an increasing number of students who are academically prepared and reflective of society's diversity.

CAFÉ Master Goal: We will cultivate collaborations with external and internal groups to promote student development and success.

LSB Strategic Goal: Regional Communities - LSB will collaboratively contribute to economic growth and sustainable business practices in our region.

The Lukenda School of Business Strategic Plan for 2013-2018 is attached. In order to align the School's strategic plan with that of the University, LSB faculty and staff adopted LSSU's seven strategies (<https://www.lssu.edu/wp-content/uploads/2017/05/StrategicPlan2012-13.pdf>) as the framework when creating the plan in 2013. This strategic plan was effective through the end of the 2017/2018 academic year. The LSB established a faculty-led Strategic Planning Committee that was tasked with developing a new strategic plan that aligns with the Strategic Direction for Lake Superior State University that was adopted in December 2017. Based on feedback received from various stakeholder groups, the updated plan is less complex and focuses on the objectives of increasing enrollment and improving student retention rates. The committee will present the new plan for approval during the fall 2018 semester.

Explain how the School works to address each of the following questions. For each question, respond with a narrative and supporting evidence.

Teaching and Learning Programs Evaluation and Improvement: (CC 4.A)

3. Explain how faculty determine program and course learning outcomes, course prerequisites, rigor of courses, expectations for student achievement, and student access to resources.

Determination of learning outcomes, prerequisites and rigor is included in the development of each LSB course and is subject to the approval of the LSB faculty and Dean and the LSSU Curriculum Committee. The instructor of each course creates a course assessment plan which aligns assessment methods to objectives. At the end of each semester, the instructor analyzes the results and uses the information to make changes to the course to improve student learning. The student learning objectives of the School's courses correlate with those of its programs.

The faculty of each LSB department collaborate to develop program learning outcomes, measures and targets. They present their recommendations to all LSB faculty and the Dean for discussion and adoption. Assessment is led by the program champion at the end of each semester. LSB faculty and the Dean analyze the results to make changes to the program and related courses in areas where objectives are not being met.

The LSB considers the following when designing and making modifications to its curriculum and dedicating resources to its courses and programs:

- University and School strategic plans
- Senior, alumni and professional advisory board survey results
- Major Field Test results
- Senior project results
- Professional examination & certification requirements
- ACBSP Requirements

4. Explain how faculty ensure the equivalence of learning outcomes and achievement in all modes and locations where degrees are delivered. Provide examples of course syllabi from multiple delivery modes and locations of the same course(s).

In addition to its main campus programs, the LSB offers degree completion programs at regional centers in Petoskey, MI and Escanaba, MI, allowing students to earn a LSSU degree without traveling to the university's main campus. The LSB controls the academic merit of its regional center programs by designing the curriculum and employing faculty to teach courses at these locations. For accounting courses, LSSU employs a regular part-time faculty member in Escanaba and hires adjuncts in Petoskey. For all other business courses, main campus LSB faculty members travel to both regional centers to deliver courses or do so online or in a blended format. Like main campus students, regional center students take the Major Field Test in Business during their graduation year. In addition, LSB faculty use the same methods when assessing the achievement of course and program objectives by main campus and regional center students. Course syllabi for the BUSN466 (Business Policy) sections taught on the main campus and at the regional centers during the spring 2018 semester are attached for comparison purposes.

While the LSB delivers the majority of its courses in a traditional format, select business courses are taught online or using a blended model, particularly during summer semesters. Most of these courses are taught by full-time LSB faculty members who incorporate the same learning outcomes, rigor, textbooks and assessment methods used when they teach the courses in a traditional format. For the few courses taught online by adjuncts, LSB faculty provide mentoring and determine the syllabus, textbook, learning outcomes and assessment methods to be used. A standard evaluation tool is used for each course, no matter the delivery format, that gives students the opportunity to provide feedback on course design and delivery. Course syllabi for the BUSN121 (Introduction to Business) sections taught in a traditional format during the spring 2018 semester and online during the summer 2017 semester are attached for comparison purposes.

5. If applicable, attach the most recent report, findings and recommendations from specialized programmatic accreditations within the School.

The LSB received initial accreditation from ACBSP for six of its programs in 2014 and is required to submit a Quality Assurance Report every two years. The most recent report was submitted in September 2018, the results of which have not yet been received. A document detailing the feedback received after submission of the 2016 Quality Assurance Report is attached.

6. Report data from the past two years to show what students are doing after graduation from the programs in your School. For example, statistical data should report the numbers of students in specific areas (*i.e.*, business, government, education, military, unemployed, pursuing advanced degrees, etc.). Attach representative data.

Documents are attached that report the employers and positions of former LSB students who graduated during the 2016/2017 and 2017/2018 academic years.

Assessment (CC 4.B and CC 4.C)

Explain how the School uses assessment to promote ongoing growth and improvement. As evidence for each question, you may choose to include content from the 'Use of Results' column in the 4-Column Program Assessment Report, or provide broader assessment results from an alternative source.

7. School-level goals and their connections to the university's CAFE Master Goals Strategic Plan were listed in Question 2 of this report. Select 3-5 of those goals as a focus for the School's 4-Column School Assessment Report; add the selected goals to the 4-Column report document, and attach the document.

A report is attached that details the assessment criteria, assessment results and use of results for three of the LSB's primary goals for the 2016/2017 and 2017/2018 academic years.

8. Describe how results from assessment have been used to improve your School. Include specific examples.

The assessment report referred to above provides examples of how LSB faculty and staff have used enrollment growth, retention and graduation rates to make improvements to the School. In addition, the LSB has sought and reviewed feedback from stakeholders for the last five years according to the following schedule:

- Senior Survey – Administered every fall and spring semesters to graduating LSB students taking the capstone course, BUSN466 (Business Policy)
- Professional Advisory Board Survey – Administered every other spring semester to LSB Professional Advisory Board (PAB) members
- Alumni Survey – Administered every five years during the summer to LSB alumni who graduated since the last alumni survey was administered

The LSB has made several improvements to its curriculum, programs and student support services in recent years based on feedback received from its stakeholders. Some examples are highlighted below.

Senior Survey

Many graduating students indicated their LSB education did not improve their preparation for graduate school, strengthen their mathematical skills or increase their exposure to diversity.

- To better prepare students for graduate-level work, LSB faculty updated the content of various upper-level courses to incorporate more research and writing assignments.
- The LSB added MGMT280 (Introduction to Management Information Systems) and MGMT371 (Operations and Business Analytics) to its curriculum. The School then hired a professor with a strong quantitative background to teach these courses along with BUSN211 (Business Statistics).
- The LSB received approval for two of its courses, INTB389 (Competing in a Global Marketplace) and BUSN308 (Managing Cultural Differences), to satisfy the LSSU general education diversity requirement. LSB faculty advise students that it is beneficial to take both courses and count one as a business elective since the courses are taught from different perspectives and cover different topics.

Professional Advisory Board Survey

PAB members encouraged LSB faculty and staff to help students develop the "soft skills", such as communication and collaboration, which employers believe recent graduates are lacking. They also promoted the development of certificate programs.

- LSB faculty assigned a group of interested business students to begin development of a senior seminar course. They used information received from PAB members, fellow students and alumni to draft course objectives, topics and activities and a course syllabus. LSB faculty members are aiming to receive approval to offer the senior seminar course from the LSSU Curriculum Committee by the end of the 2018/2019 academic year.
- LSB faculty members have begun the process of developing certificate programs in international business and e-marketing.

Alumni Survey

Several respondents expressed that the LSB needed its own, modern facility with current technology. Many others commented on the value of student internships.

- LSB faculty and staff successfully campaigned for LSSU's historic South Hall to be renovated and become the permanent home for the School. R.W. Considine Hall now provides a state-of-the-art learning environment for LSB students.
- The LSB has focused on providing additional internship opportunities for its students by building relationships with local employers and making contacts through PAB members. LSB faculty and staff also advise students on the value of these experiences and increase students' awareness of available internships through email and social media.

9. Describe how the School uses assessment results to inform and facilitate better planning and budgeting.

As described above, LSB faculty and staff make decisions and improvements based on information received through measuring enrollment growth, retention and graduation rates and surveying senior students, graduates and Professional Advisory members. At the end of each academic year, the LSB Chair gathers, compiles and distributes the results to LSB faculty and staff for review before they are discussed at the first School meeting of the next academic year. The information is used to plan major initiatives for the year and allocate time and human and financial resources accordingly. For example, LSB faculty and staff chose to concentrate on increasing student enrollment and retention during the reporting period based on assessment results. Activities engaged in by the LSB related to student retention are described in the response for the next question. Key initiatives related to recruiting students that required significant resources include the following:

- The LSB has hosted events such as Occupational Education Day and the Superior Case Competition that brought several hundred high school students to campus.
- The LSB publicized the accomplishments of its students, staff, faculty and alumni through the local newspaper, LSSU publications and social media.
- LSB faculty and staff contacted students who had been admitted to LSSU and expressed an interest in business. The correspondence sent contained contact information of faculty members and encouraged the students to register for freshman orientation.
- The LSB developed articulation agreements with high schools and community colleges.
- R.W. Considine Hall is now the home of the LSB after completion of a \$13.5 million construction project. Students have benefitted from taking classes in the state-of-the-art building since January 2017.

10. In addition to LSSU's campus-wide programs designed to support retention and degree completion, list any additional activities of the School specifically intended to increase retention and degree completion.

According to senior survey results, LSB students believe the business faculty and the personal education delivered are the School's greatest strengths. Examples of how LSB faculty and staff have recently capitalized on these strengths to retain students include the following:

- LSB faculty and staff have adopted LSSU's "Students First" motto. They have an open-door policy when it comes to academic and advising assistance, and they aim to respond to every student inquiry in a timely manner.
- LSB faculty have focused on engaging students outside of the classroom. For example, a management professor began taking students to an international business plan competition and an accounting professor began participating in study groups to prepare students for the CMA Exam. Also, faculty and staff have involved students in the planning and execution of recruiting events and activities with the LSB Professional Advisory Board.
- In response to LSSU's new requirement that all degree programs include a first-year experience course, the LSB added BUSN101 (Freshman Seminar) to its curriculum and began offering the course in fall 2018.

The LSB has concentrated on increasing graduation rates through improved academic advising practices. Examples are highlighted below:

- Toward the end of each semester, the Registrar's Office sends a document listing the name of each student who has applied to graduate. The LSB Chair and Academic Assistant review the list in detail to ensure no business students are missing.
- The Registrar's Office sends an email message to students after they apply to graduate that lists the requirements they are missing. The LSB Chair reviews the degree completion plan of each student to ensure the student will satisfy the missing requirements before the deadline.
- After each semester's graduation, the Registrar's Office sends a document listing each student who applied but did not graduate. The LSB Chair determines which requirements the students are missing and contacts them to discuss a completion plan.
- LSSU began using Ellucian Degree Works as its academic advising and degree audit program. LSB faculty have taken advantage of the program's capabilities and encourage students to do the same. Students have expressed that the new program makes it much easier for them to track their progress toward degree completion.

Resources (CC 5.A and CC 5.C).

11. Describe how the School allocates resources to adequately support the mission. Include explanations of faculty/staff, fiscal, and infrastructure allocations. For example, describe the process used to ensure that each faculty member or instructor in the program is qualified to teach the courses they are assigned, as consistent with HLC guidelines.

(<https://www.hlcommission.org/Publications/determining-qualified-faculty.html>)

LSB faculty and staff are confident the School's mission and objectives are currently being met due to adequate allocation of human and fiscal resources. Evidence in support of this conclusion includes the following:

- LSB's professionally qualified faculty members have the certifications (CPA, CFA) and experience appropriate for an undergraduate, teaching-focused university that prides itself on providing students with practical, real-world experience.
- The LSB is committed to the professional development of its faculty members and encourages the pursuit of scholarly activities. LSB faculty members continue to perform research, publish articles, present at conferences and collaborate with colleagues across campus. Faculty members are rated by their Dean and peers on their "Scholarly and Creative Activities" for evaluation, tenure and promotion purposes.
- Top notch results realized by LSB students during the reporting period, such as those described below, prove they are receiving high quality instruction that enables them to successfully compete with business students around the world.
 - During the reporting period, 30 LSB students scored higher than 80% of the students who took the Major Field Test in Business across the nation. Thirteen of these students scored in the 90th percentile or above.
 - A team of four LSB students tied for first place in the 2018 Northern Ontario Business Case Competition. Another LSB team earned second place at the 2017 event.
 - The LSB Enactus team earned a first place finish at the 2017 Regional Competition which qualified them to compete at the Enactus United States National Exposition.
 - The LSB tracks the placement of its graduates to measure how many secure gainful employment within a year. Results indicate LSB graduates are prepared to competitively enter the job market with a broad set of skills applicable across many sectors.
 - As indicated on the Senior Survey, LSB students believe the faculty is one of the School's greatest strengths. In recent periods, students have provided very positive feedback on faculty members' knowledge, expertise, experience, availability and passion.

During the reporting period, LSSU faculty and staff devoted a significant amount of time to ensure compliance with the Higher Learning Commission's updated requirements regarding faculty qualifications (Assumed Practice B.2). As a first step, they collaborated to establish the minimum qualifications needed to teach each business course based on its student learning outcomes. The next step was to determine which current LSB faculty members are qualified to teach each course based on academic credentials and tested experience. This information is summarized in the attached table entitled "Business Course Qualifications". Each LSB faculty member then completed a new Teaching Qualifications Form. Those who used tested experience (along with a master's degree in a related field) as a basis for qualifications also completed a memo describing the experience and how it relates to specific courses. The Teaching Qualifications Forms and the Faculty Tested Experience Memos are attached.

12. Explain how the School ensures that the curriculum for each program is current. For example, evidence may include specialized program accreditation, advisory boards, Input from Industry, discipline standards, previous School reviews or reports, etc.

As noted previously, the LSB received initial accreditation from the Accreditation Council for Business Schools and Programs (ACBSP) for six of its programs in 2014. The LSB is required to submit a Quality Assurance Report every two years and subsequently receives feedback from the ACBSP Board of Commissioners. The LSB must meet ACBSP's requirements regarding the general education and common professional components of its programs in order to maintain accreditation.

Many LSB students pursue professional certifications upon graduation. The LSB ensures its programs meet the educational requirements of the Certified Public Accountant, Certified Management Accountant, Certified Financial Advisor and Society for Human Resource Management examinations.

The LSB has a Professional Advisory Board (PAB) comprised of experts in various business fields. LSB faculty, staff and students meet with the PAB once per semester and work together to achieve program quality and relevance. PAB members advise on improvements to existing LSB programs and assist in the development of new programs.

The LSB administers the Major Field Test in Business (MFT) each semester to its senior students who are enrolled in the bachelor degree capstone course, Business Policy (BUSN466). Faculty and staff compare LSB student results in nine business areas with that of thousands of students across the nation. Analysis of these results has allowed the LSB to make numerous improvements to its programs.

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Strategic Plan
This documentation is relevant to Question number:	Part 1 Question #2
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides evidence that the school-level goals support LSSU's Strategic Plan.

Lake Superior State University
Lukenda School of Business
Strategic Plan
2013-2018

STRATEGIC GOAL 1: Collaborative, Committed Learning Community					
LSB will develop a permanent and permeating culture of sharing ideas, knowledge, resources, and talent, fostering a sense of pride and community.					
1. STRATEGIC OBJECTIVE 1. LSB will strengthen participation in LSSU shared governance.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Track faculty participation on shared governance committees.	Dean and Chair	Time for task	Ratio of committees to faculty members	Ongoing 2013 2018	1.1 2
Include governance committee reports on LSB meeting agendas.	Faculty	Time for task – 15 minutes bi-weekly	Number of reports	Ongoing 2013	90% of LSB meeting agendas contain committee reports
1. STRATEGIC OBJECTIVE 2. LSB will create opportunities for collaborations across programs.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Meet with all departments to review new LSB courses and programs and to review/discuss collaboration.	Chair and Faculty	Time for task – 12 hours total	Percentage of departments met with	3 years - End of 2015/2016 academic year	100%

1. STRATEGIC OBJECTIVE 3. LSB will promote <i>esprit de corps</i> of students, faculty and staff.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Provide designated locations within LSB for student-student and faculty-student interaction.	Dean and Chair	New building	Student survey	Spring 2015	80% of students report usage and satisfaction
Provide improved, dedicated office space for faculty and faculty-faculty interaction.	Dean	New building	Faculty survey	Spring 2015	90% faculty satisfaction
Host networking events for students.	Dean and Faculty	\$4,000	Number of events	2013 2018	4 8

STRATEGIC GOAL 2: Desirable School of Choice (recruiting/academic reputation)					
LSB will attract an increasing number of students who are academically prepared and reflective of society's diversity.					
2. STRATEGIC OBJECTIVE 1. LSB will increase enrollment.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Meet with prospective students who visit campus.	Dean and Faculty	100 hours and trinkets	Percentage of students met	Ongoing - 2013 2016 2018	50% 75% 95%
Develop academic year and summer schedules for faculty availability for prospective student meetings.	Chair and Faculty	2 hours	Completed schedules	Ongoing	Academic year and summer schedules completed annually
Contact admitted students.	Faculty and Current Students	Script and pizza	Percentage of admitted students contacted	Ongoing	100%

Develop MBA and/or Bachelor of Applied Management program.	Dean and Lead Faculty	Faculty, funding	Developed program	End of 2014/2015 academic year	Program approval
2. STRATEGIC OBJECTIVE 2. LSB students will reflect the diversity of our region and we will prepare them for an increasingly global society.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Assure business students take the Major Field Test in Business.	BUSN466 Instructor	2 contact hours per semester	Percentage of graduating seniors who take test	Ongoing	90%
Track scores in international section of Major Field Test in Business.	School Assessment Committee	2 hours for analysis per semester	Mean student score	Ongoing	Greater than national mean
2. STRATEGIC OBJECTIVE 3. LSB will increase its visibility and enhance its position to targeted audiences.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Increase publicity through LSSU public relations department for faculty and student accomplishments.	Dean, Chair, and Faculty	Time	Number of press releases	Ongoing	1 per month
Participate in university development day or similar forum.	Dean, Chair, and Faculty	Time	Number of presentations to faculty members	Ongoing	1 per faculty annually
Develop/distribute marketing material for LSB programs.	Dean, Chair, and Faculty	\$3,000	Program information brochures	2013 2014	All majors All minors
Acquire display booth for college fairs and other exhibitions.	Dean, Chair, and Faculty	\$2,000	Acquisition	2015	Booth acquired
Increase faculty presentations at select high schools, DECA and BPA.	Dean, Chair, and Faculty	Time	Number of presentations	2013/2014 2014/2015	3 presentations 6 presentations

				Ongoing	
				2013/2014	50% of alumni highly recommend LSB
				2014/2015	60% of alumni highly recommend LSB
Increase word of mouth advertising through satisfied graduates.	Dean, Chair, and Faculty	Time for task	Senior survey	2015/2016	70% of alumni highly recommend LSB
				Ongoing	
Produce LSB newsletter.	Dean, Chair, Faculty and Administrative Assistant	Time for task	Number of newsletters produced per year	2013/2014 2014/2015	2 newsletters 3 newsletters
				Ongoing	
Ensure mentions in Laker Log.	Dean, Chair, and Faculty	Time for task	Number of articles	2013/2014 2014/2015	4 mentions 6 mentions
				Ongoing	
Update LSB Facebook page.	Dean, Chair, Faculty and Administrative Assistant	Time for task	Number of hits	2013/2014	20% increase in both hits and updates

STRATEGIC GOAL 3: Student Experience (retention/co-curricular)					
LSB will provide students with a supportive and connected experience to enhance student development.					
3. STRATEGIC OBJECTIVE 1. LSB will increase first-year retention rates.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Track student retention rate by program to establish a baseline.	Dean and Chair	Data	First-year student retention rate	2013/2014	A baseline
Track retention rate of Red & Red 2 status students through Map-Works to establish a baseline.	Faculty	Data	Red and Red 2 status	2013/2014	A baseline
3. STRATEGIC OBJECTIVE 2. LSB will increase student participation in co-curricular and extra-curricular activities.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Visit 100-level and 200-level classes to present club opportunities.	Advisors and Club Officers	Access to classes	% of sections visited per semester	On-going	80% of key classes visited
Seek academic credit for co-curricular business clubs.	Advisors and Faculty	Time for task	Approval	Fall 2014	Offer sections Spring 2015 for credit
3. STRATEGIC OBJECTIVE 3. LSB will pursue new facilities and major renovations.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Complete fundraising for South Hall.	LSSU Foundation, Dean, President, VP of Finance and Faculty	Time for task and travel	Dollars raised	Spring 2014	\$900,000
Renovate South Hall as home of LSB.	VP of Finance	\$12,000,000	Construction project plan	Summer 2015	Occupancy

STRATEGIC GOAL 4: Student Learning and Development					
LSB will maintain and develop excellent programs for students which provide experiential learning activities that capitalize on this unique region.					
4. STRATEGIC OBJECTIVE 1. LSB will increase graduation rates.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Establish baseline retention and graduation rates of LSB students.	Faculty and Staff	Time for task and existing resources	6-year graduation rate	Fall 2013	Baseline
Increase the use of the Learning Center and Map-Works by at-risk LSB students.	Faculty and Staff	Time for task and existing resources	Usage rate of Learning Center and MAP-Works program by students with GPA less than 2.3	Ongoing – Fall 2015	50% of at-risk students
Increase LSB student engagement in campus clubs and activities.	Faculty and Staff	Time and information	Percentage of students involved in varsity athletics and extra and co-curricular clubs	Ongoing – Fall 2015	50% of students
Ensure graduating LSB students have a good, current resume and job-seeking skills, i.e. dress for success, mock interview, networking.	Faculty and Career Services	Existing	Student usage of Career Services	Ongoing – Fall 2015	75% of students

4. STRATEGIC OBJECTIVE 2. LSB will increase high-impact educational experiences in degree programs.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Increase experiential learning through clubs, internships and in-class assignments.	Faculty	Time, clubs and class work	LSB student participation rate in co-curricular clubs	Ongoing – Fall 2015	50% of students
			LSB student participation rate in internship opportunities	Ongoing - Fall 2015	20% of students
Increase the use of project-based learning and case studies in business courses.	Faculty	Time and academic resources	Percentage of 400-level courses that require a group project or case with presentation	Ongoing ~ Fall 2015	75%

STRATEGIC GOAL 5: Regional Communities					
LSB will collaboratively contribute to economic growth and sustainable business practices in our region.					
5. STRATEGIC OBJECTIVE 1. LSB will continue to foster economic development ties through collaborations.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Promote student collaborations with entrepreneurs, Product Development Center, SmartZone.	Faculty	Time for task	Number of collaborations, internships and projects	2013-2014	3 collaborations per semester
Organize or participate in events to benefit businesses, charities, external communities in the region.	Faculty	Time for task	Number of events	2013-2014	5 events per semester
5. STRATEGIC OBJECTIVE 2. LSB will investigate appropriate community and continuing education programs.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Survey community/local business needs for continuing education or contract training.	Dean	Time for task	Survey local needs PAB Survey	2014-2015	Completed surveys
5. STRATEGIC OBJECTIVE 3. LSB will increase accessibility of its programs.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Provide consistent training for online instruction by faculty.	Dean	Time/Money	Training course	2013-2014	50% of faculty have had training
Increase on-line delivery of classes.	Dean and Faculty	Time	# of on-line classes	2014-2015	10% of all classes offered on line
Adopt holistic approach to evaluate viability of course offerings, i.e. summer, on-line.	Dean, Chair and Faculty	Time	Flexibility and discretion	2014-2015	Approach implemented

STRATEGIC GOAL 6: Educational Support					
LSB will establish and maintain an appropriate level of educational resources to effectively support learning.					
6. STRATEGIC OBJECTIVE 1. LSB will engage in effective assessment activities.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Analyze Major Field Test (MFT) results to evaluate areas for improvement.	Faculty	Time for task	MFT scores	Annual	Above the national mean
Input courses, programs and assessment outcomes into Tracdat.	Faculty	Time for task	Tracdat reports	2014/2015	50% of courses are entered in Tracdat
6. STRATEGIC OBJECTIVE 2. LSB will acquire and maintain the equipment/software necessary to deliver high-quality, mission-focused programs.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Perform an annual review of software needs using industry standards.	Program Faculty	Money	Current software in labs	Annual	No student complaints
Perform an annual review of equipment needs as required by Perkins funding.	Program Faculty	Perkins money	Senior survey question	Annual	All Perkins money allocated to LSB is spent

6. STRATEGIC OBJECTIVE 3. LSB will have the human capital to support its programs and enrollment.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Increase professional development funds for faculty to keep current in their fields.	Dean	Money	Faculty certification needs	Annual	Faculty certification needs are met
Hire more faculty to decrease overload and allow faculty more time for other activities such as assessment, advising, and meet ACBSP maximum faculty load requirements.	HR Needs Assessment and Dean	Money	Overload report	Annual	ACBSP overload requirements met
6. STRATEGIC OBJECTIVE 4. LSB will provide attentive, regular academic advising.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Faculty contact students to encourage making advising appointments.	Faculty	Time for task and IT support	Percentage of students contacted	Annual	80% of students
Survey students regarding their needs and expectations of academic advising.	Faculty, Dean and Staff	Time for task	Administration of advising survey	Fall 2014	Administer survey

STRATEGIC GOAL 7: Stewardship and Sustainability					
LSB will promote efficient and effective utilization of resources to lay the foundation for growth and sustainability.					
7. STRATEGIC OBJECTIVE 1. LSB will support systematic planning, developmental and assessment processes to assure ongoing improvement of its programs.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Present an annual budget to faculty and staff for review and input.	Dean	Time for task	Budget presentation	February each year	Annual presentation
Annual review and update of strategic plan.	Dean, Chair and Faculty	Time for task	Strategic plan review	Convocation week each year	Annual review
7. STRATEGIC OBJECTIVE 2. LSB will cultivate alumni and friend relationships, promote giving, and practice sound stewardship of endowed funds.					
<i>Action Plan</i>	<i>Accountability</i>	<i>Resource Requirements</i>	<i>Metric</i>	<i>Planning Horizon & Deadline</i>	<i>KPI (Performance Target)</i>
Craft a plan to bolster connections with alumni and friends. Conduits to include: Facebook page, e-newsletter and Professional Advisory Board.	Dean & Administrative Assistant	Time for task	Completed plan	2013/2014	Plan completed
Ensure that endowed scholarships are awarded to highly-qualified applicants in a timely manner.	Dean, Faculty and Administrative Assistant	Time for task	Number of available scholarships awarded	End of spring semester annually	100% of scholarships awarded
Email or call alumni.	Dean and Faculty	Time for task	Number of alumni contacted	Monthly	5 per month
Visit alumni.	Dean and Faculty	Time for task and money for travel	Number of alumni visited	Monthly	2 per month
Attend alumni activities.	Dean and Faculty	Time for task and money for travel	Number of events attended	Annually	4 per year
Attend non-academic extra-curricular events.	Dean and Faculty	Time for task and money for travel	Number of events attended	Annually	5 per year

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	BUSN466 Syllabi
This documentation is relevant to Question number:	Part 1 Question #4
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides evidence that equivalent learning outcomes are achieved at all LSSU locations.

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 **LAKE SUPERIOR**
STATE UNIVERSITY
BUSN – 466 – 001 Business Policy
Spring 2018

Prerequisites

Courses required of all business majors: Accounting Principles I and II, Statistics, Managerial Finance, Marketing Principles, Management Concepts and Applications (recommended but not currently required for Accounting and Finance-Econ majors), Human Resources Management, Data Processing – Spreadsheet, Business Government and Society, Business Law I&II, Business Communications (including experience with word processing software, presentation graphics, knowledge of APA report format, and use of library databases).

Instructor: Ralf Wilhelms, DBA
Office: 317 Library Building
Time: 11:00 a.m. to 12:20 p.m.

Class Schedule: Monday/Wednesday
Class Location: CON 236
Email: rwilhelms@lssu.edu
Phone: 906-635-2108

Office Hours:

Tuesday	Wednesday	Thursday
10:30 a.m. – 12:00 pm	9:30 a.m. - 11 a.m. 4:30 p.m. – 6 p.m.	10:30 a.m. – 12:00 p.m.

Required Text

Ralf Wilhelms and Shengxia Li (2015) Strategic Management: Integrated and Practical Approach. Whuham University Press, China

Recommended Text

Aaron, Jane E. (2000). Little, Brown Essential Handbook for Writers (3rd ed.). New York: Addison Wesley Longman. ISBN: 0-321-04970-5

Abrams, R. M. (2003). The successful business plan: Secrets & Strategies (4th ed.). Palo Alto, CA: The Planning Shop TM. ISBN: 0-9669635-6-3

Geoffrey Marczyk, David DeMotteo, David Festinger (2005). Essentials of Research Design and Methodology. Hoboken, NJ: John Wiley & Sons. ISBN: 0-471-47053-8

Course Description

Business Policy is a capstone course, which provides an opportunity for the student to develop an understanding of the interrelationship of the divisions, departments and functions of the “whole firm” and its environment. Students work in teams or as individuals under the guidance of their Faculty. Students identify original data sources,

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complete and present their project in written form and make an oral presentation form to faculty and classmates.

Course Goal

This course provides the student an opportunity to develop an understanding of the interrelationship of the divisions, departments and functions of the “whole firm” and its environment.

Course Objectives

Upon successful completion of this course, the student will be able to:

Overarching Objectives

- Synthesize and apply content from their undergraduate courses and other learning opportunities to better understand real world situations.
- Understand, integrate, and value the relationships across business disciplines
- Distinguish real world problems and demonstrate the application of solutions from theoretical frameworks and business practices.
- Analyze and compare the various techniques, strategies, and structures in Business.
- Analyze the strategy of a company, its business position, and how it can gain sustainable competitive advantage

Business Project: Business Plan Objective

- Assess/evaluate the requirements of a business plan, which includes appropriate background information.
- Organize the appropriate information required in a business plan.
- Construct a business plan that will satisfy the needs of entrepreneurs and potential investors.

Project Options

Business Project – Business Plan

A Business plan includes a clear statement of the nature of a business venture, the business opportunity, the steps to be taken to capitalize on the opportunity, and the financial requirements. Key to a successful plan is substantiating the viability of the venture. Research in this option is primarily in quantifying the opportunity and the competitive situation. Business plans are used to acquire capital and to guide the operations.

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Grading Scale and Policies:

<u>Point Values</u>	<u>Points</u>
Assignments	
Theory Presentation	100
Kiva.org – paper	100
Discussion Board	100
Business Plan	<u>500</u>
Total	800

100- 98% = A+		
97 – 92% = A	81 – 80% = B-	67 – 66% = D+
91 – 90% = A-	79 – 78% = C+	65 – 62% = D
89 – 88% = B+	77 – 70% = C	61 – 60% = D-
87 – 82% = B	69 – 68% = C-	59 – 0 % = F

Course Policies:

1. Completing assignments on time and keeping up with the class material is important for success in this course and in college. Late Assignments **will not be** accepted except for legitimate **pre-approved** reasons as determined by the instructor. Examples of legitimate reasons are: Severe illness, death in family, etc.
2. Students are expected to perform all assigned work themselves. Any form of cheating or plagiarism will be handled in accordance with the University policy on Academic Integrity:
<http://www.lssu.edu/academics/pdfs/Academic%20Integrity%20Policy.pdf>
3. Use of headphones, cell phones and hats during exams is prohibited.
4. All courses at LSSU are required to provide the students with an educationally challenging culminating experience; typically referred to as a final exam.
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In compliance with Lake Superior State University policies and equal access laws, disability-related accommodations or services are available to students with documented disabilities.

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Students who desire such services should meet with instructors in a timely manner, preferable during the first week of class, to discuss individual disability related needs. Any students who feel that an accommodation is needed – based on the impact of a disability – should meet with instructors privately to discuss specific needs.

IPASS (Individual Plan for Academic Student Success)

If at the time of your mid-term your grades reflect that you are at risk for failing some or all of your classes, you will be contacted by a representative of IPASS. The IPASS program is designed to help you gain control over your learning through pro-active communication and goal setting the development of intentional learning skills and study habits, and personal accountability. You may contact (906) 635-2887 or email ipass@lssu.edu if you would like to sign up early in the semester or if you have any questions or concerns.

HONOR PLEDGE

As a student of Lake Superior State University, you have pledged to support the Student Honor Code of the Lukenda School of Business. You will refrain from any form of academic dishonesty or deception such as cheating, stealing, plagiarism or lying on take-home assignments, homework, computer programs, lab reports, quizzes, tests or exams, which are Honor Code violations. Furthermore, you understand and accept the potential consequences of punishable behavior.

Tentative Course Outline

Class Schedule**Spring '18 BUSN 466**

Date:	01/15	Student Orientation: Review
	01/17	Business Project –Business Plan <ul style="list-style-type: none"> • Introduction to Strategic Management - Chapter 1 <p style="text-align: center;">Start working on your project</p>
Date:	01/22	External Analysis: Opportunities and Threats – Chapter 2
	01/24	• Assignment I: Due 02/14/18 Strategic Management Theories – Major theories in Strategic MGT
Date:	01/29	• Internal Analysis: Distinctive Competencies, Competitive Advantage, and Profitability – Chapter 3
	01/31	• Writing a Business Plan – Business Project
Date:	02/05	• Building Competitive Advantage Through Functional Level Strategy
	02/07	• Writing a Business Plan – Business Project
Date:	02/12	• Writing a Business Plan – Business Project
	02/14	Project Proposal – Form 1 <ul style="list-style-type: none"> • Draft Project Proposal – 3 to 4 pages <ul style="list-style-type: none"> ▪ What will be the outcomes when it is done successfully? ▪ What will be the benefit from achieving these outcomes? ▪ For you ▪ For others ▪ Attach a copy of the generic outline for your type of project

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Date: 02/19 • Presentations
02/21 **Assignment II: Kiva Due 03/14/18**

Date: 02/26 • Building Competitive Advantage Through Business Functional level
02/28 Strategy Chapters 4 & 5

Date: 03/12 • Group review of business projects – Presentations
03/14 Kiva Paper – Investment consideration

Date: 03/19 • Business-Level Strategy and the Industry Environment – Chapter 6
03/21 Group discussion on projects
• Strategy and Technology – Chapter 7 – Progress report business project

Assignment III: Discussion Board (Blackboard):

Share your companies strategy, how is the company positioned and how you will gain a sustainable competitive advantage with your company.

You will have to post your initial answer to the question by Wednesday March 28th and you will have to provide critique feedback (respond post) to two (2) initial posts by Sunday April 1st.

Date: 03/26 • Strategy in the Global Environment – Chapter 8
03/28 - Group discussion on projects
• Corporate-Level Strategy: Horizontal Integration, Vertical Integration and Strategic Outsourcing – Chapter 9 - Progress report business project

Date: 04/02 • International Strategies Chapter 11 –
04/04 Group discussion on projects

Date: 04/09 • Corporate Performance, Governance, and Business Ethics – Chapter 11 –
04/11 Group discussion on projects
• **Major Field Test**

Date: 04/16 Oral Presentations
04/18

Date: 04/23 • Oral Presentations • Submit Completed Project
04/25

Date: 05/02 Final Week

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Selection of Project Type and Topic – DUE 02/14/2018
Form 1 – Part 1

Prior to the development of the project proposal, students select a topic for their project. The topic is submitted to the Faculty for approval.

Date: _____ Degree Program: _____

Student(s) Name: _____

ID Number: _____

Address: _____

Telephone: _____

Email: _____

Name of Faculty Project Advisor: _____

Format: () Business Plan () Business/Industry Analysis () Marketing Plan

Brief Description of Topic:

If team project, name of other student(s):

Student Signature: _____ Date: _____

Action by Faculty Project Advisor: () Approved () Not Approved

Comments: _____

Signature: _____ Date: _____

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Project Rationale

Form 1 – Part 2

(On this or a separate sheet of paper, present your rationale for choosing this topic.)

What about this project holds personal interest to you? (For example, for years you have wanted to have a small contracting business. Or, you have been interested in a specific industry.)

What is your business reason for pursuing this project?

How will completing this project better prepare you for your work after you complete your degree?

LSSU Library APA Style

This is not a sample reference list. A reference list should be alphabetized.

BOOKS

- Encyclopedia Entry: Bergman, P.G. (1993). Relativity. In *The new encyclopedia Britannica* (Vol. 26, pp. 501-508). Chicago: Encyclopedia Britannica.
- Book: Beck, C.A.J., & Sales, B.D. (2001). *Family mediations: Facts, myths, and future prospects*. Washington, DC: American Psychological Association.
- Book (no author): *Merriam-Webster's collegiate dictionary* (10th ed.). (1993). Springfield, MA: Merriam-Webster.
- Edited Book: Gibbs, J. T., & Huang, L. N. (Eds.). (1991). *Children of color: Interventions with minorities*. San Francisco: Jossey-Bass.
- Chapter in an edited Book: Bjork, R. A. (1989). Retrieval inhibitions. In H.L. Roediger III & F.I.M. Craik (Eds.), *Varieties of memory & consciousness* (pp. 309-330). Hillsdale, NJ: Erlbaum.
- Citation of a work discussed in a secondary source: Coltheart, M., Curtis, B., & Atkins, P. (1993). Models of reading aloud. *Psychological Review*, 100, 589-608.
- Legal case: Lessard v. Schmidt, 349 F. Supp. 1078 (E.D. Wis. 1972).

PERIODICAL ARTICLES

- Magazine: Kandel, E.R., & Squire, L.R. (2000, November 10). Neuroscience: Breaking down scientific barriers. *Science*, 290, 1113-1120.
- Journal (paginated by issue): Klimoski, R. (1993). The ADA and the hiring process. *Consulting Psychology Journal: Practice and Research*, 45(2), 10-36.
- Journal (continuous pagination): Bekerian, D. A. (1993). Searching for the typical eyewitness. *American Psychologist*, 48, 574-576.
- Newspaper: Davis, J. (1993, July 15). Drug cuts heart failure risk. *New York Times*, p. A12.
- ERIC Document (ED): Mead, J. V. (1992). *Looking at the old photographs: Investigating tales* (Report No. NCRTL-RR-92-4). East Lansing, MI: National Center for Research on Teacher Learning. (ERIC Document Reproduction Service No. ED 346082)

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APA Reference Guide

For information on citing electronic sources visit: <http://www.apastyle.org/electref.html>

ELECTRONIC SOURCES

- Multipage document
created by a private organization: Greater New Milford (CT) Area Healthy Community 2000, Task Force on Teen and Adolescent Issues. (n.d.). *Who has time for a family meal? You do!* Retrieved October 5, 2000, from <http://www.familymealtime.org>
- Chapter/Section in an
Internet document: Benton Foundation. (1998, July 7). Barriers to closing the gap. In *Losing ground bit by bit: Low-income communities in the information age* (chap. 2). Retrieved from <http://www.benton.org/Library/Low-Income/two.html>
- Stand-alone document,
no author, no date: *GVU's 8th WWW user survey*. (n.d.). Retrieved August 8, 2000, from http://www.cc.gatech.edu/gvu/user_surveys/survey-1997-10
- Message posted to a
discussion group: Simons, D.J. (2000, July 14). New resources for visual cognition [Msg 31]. Message posted to <http://groups.yahoo.com/group/visualcognition/message/31>
- Electronic copy of a journal
article from a database: Borman, W.C., Hanson, M.A., Oppler, S.H., Pulakos, E.D., & White, L.A. (1993). Role of early supervisory experience in supervisor performance. *Journal of Applied Psychology, 78*, 443-449. Retrieved October 23, 2000, from PsycARTICLES database.
- Internet articles based
on a print source: VandenBos, G., Knapp, S., & Doe, J. (2001). Role of reference elements in the selection of resources by psychology undergraduates [Electronic version]. *Journal of Bibliographic Research, 5*, 117-123.
- Daily newspaper article
available by search: Hiltz, P.J. (1999, February 16). In forecasting their emotions, most people flunk out. *New York Times*. Retrieved November 21, 2000, from <http://www.nytimes.com>
- Electronic books (e-books): Rothman, R. (1999). *Testing, teaching, and learning*. Retrieved August 30, 2001 from NetLibrary: <http://www.netlibrary.com>

For more information, see: *Publication manual of the American Psychological Association* (5th ed.). (2001). Washington, DC: American Psychological Association.

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3 Credits

BUSN466 Business Plan – Grading Rubric

Student Name: _____ Business: _____	<u>Possible</u>	<u>Actual</u>
Executive Summary (65 points)	65	
<u>Management Plan (50)</u>	50	
The Company (5)		
Mission Statement (10 points)		
Intellectual Property /Company Location (5 points)		
Swot Analysis (10 points)		
Management & Organization (10)		
Management Team, Staffing, Board of Directors (10)		
<u>Technology Outline (20)</u>	20	
Internet, Hardware Needs, Software Needs		
<u>Econ & Finance (65)</u>	65	
<u>Industry Analysis (25)</u>		
Size and Growth Rate of the Industry (10 points)		
Trends (5 points)		
Opportunities (5 points)		
Barriers of Entry (5 points)		
<u>The Competition (55)</u>	55	
Competitors Direct-Indirect (10 points)		
Market Share Distribution (10 points)		
Competitive Advantages (10 points)		
Break even analysis (10)		
Financial Assumptions, Capital Requirements (15 points)		
<u>Legal and Social (20)</u>	20	
The Company (5)		
Ownership (10)		
Business license (5)		
<u>Accounting (70)</u>	70	
Monthly Profit and Loss Statement (20 points)		
Annual Income statements 3 years (20 points)		
Cash flow analysis (20 points)		
Balance Sheet (10 points)		

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Marketing (80)	80
Target Market (10 points)	
Market Analysis (10 points)	
Demographics (10 points)	
Positioning (5 points)	
Industry Trend (5 points)	
Company Strengths (5 points)	
Promotional Mix (15)	
Marketing Mix 4 p's (20)	
Critical Thinking (20)	20
Milestones & Exit Strategy (10)	
Goals, Strategies, Milestones, Risk Evaluation, Exit Plan (10)	
Appendix (20 points)	20
APA (20 points)	20
Grammar/punctuation/writing style (15 points)	15
Total	500

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3 Credits

 **Lake Superior
State University**
BUSN – 466 - 099 Business Policy
Spring 2018

Prerequisites

Courses required of all business majors: Accounting Principles I and II, Statistics, Managerial Finance, Marketing Principles, Management Concepts and Applications (recommended but not currently required for Accounting and Finance-Econ majors), Human Resources Management, Data Processing – Spreadsheet, Business Government and Society, Business Law I&II, Business Communications (including experience with word processing software, presentation graphics, knowledge of APA report format, and use of library databases).

Instructor: Ralf Wilhelms, DBA
Office: 221 Considine Hall
Office Hours: By appointment

Email: rwilhelms@lssu.edu

Class Schedule: Fri-Sat
Class Location: Escanaba/Petoskey
Time: Friday 6:00 pm – 9:00 pm
Saturday 8:00 am – 3:00 pm
Phone: 906-635-2108

Required Text

Ralf Wilhelms and Shengxia Li (2015) Strategic Management: Integrated and Practical Approach. Whuham University Press, China

Recommended Text

Aaron, Jane E. (2000). Little, Brown Essential Handbook for Writers (3rd ed.). New York: Addison Wesley Longman. ISBN: 0-321-04970-5

Abrams, R. M. (2003). The successful business plan: Secrets & Strategies (4th ed.). Palo Alto, CA: The Planning Shop TM. ISBN: 0-9669635-6-3

Geoffrey Marczyk, David DeMotteo, David Festinger (2005). Essentials of Research Design and Methodology. Hoboken, NJ: John Wiley & Sons. ISBN: 0-471-47053-8

Course Description

Business Policy is a capstone course, which provides an opportunity for the student to develop an understanding of the interrelationship of the divisions, departments and functions of the “whole firm” and its environment. Students work in teams or as individuals under the guidance of their Faculty. Students identify original data sources, complete and present their project in written form and make an oral presentation form to faculty and classmates.

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3 Credits

Course Goal

This course provides the student an opportunity to develop an understanding of the interrelationship of the divisions, departments and functions of the “whole firm” and its environment.

Course Objectives

Upon successful completion of this course, the student will be able to:

Overarching Objectives

- Synthesize and apply content from their undergraduate courses and other learning opportunities to better understand real world situations.
- Understand, integrate, and value the relationships across business disciplines
- Distinguish real world problems and demonstrate the application of solutions from theoretical frameworks and business practices.
- Analyze and compare the various techniques, strategies, and structures in Business.
- Analyze the strategy of a company, its business position, and how it can gain sustainable competitive advantage

Business Project: Business Plan Objective

- Assess/evaluate the requirements of a business plan, which includes appropriate background information.
- Organize the appropriate information required in a business plan.
- Construct a business plan that will satisfy the needs of entrepreneurs and potential investors

Project Options

Business Project – Business Plan

A Business plan includes a clear statement of the nature of a business venture, the business opportunity, the steps to be taken to capitalize on the opportunity, and the financial requirements. Key to a successful plan is substantiating the viability of the venture. Research in this option is primarily in quantifying the opportunity and the competitive situation. Business plans are used to acquire capital and to guide the operations.

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

Grading Scale and Policies:

<u>Point Values</u>		<u>Points</u>
Assignments		
Theory Presentation		100
Kiva.org – paper		100
Discussion Board		100
Business Plan		<u>500</u>
Total		800
100- 98% = A+		
97 – 92% = A	81 – 80% = B-	67 – 66% = D+
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87 – 82% = B	69 – 68% = C-	59 – 0 % = F

Course Policies:

1. Completing assignments on time and keeping up with the class material is important for success in this course and in college. Late Assignments **will not** be accepted except for legitimate **pre-approved** reasons as determined by the instructor. Examples of legitimate reasons are: Severe illness, death in family, etc.
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Any students who feel that an accommodation is needed – based on the impact of a disability – should meet with instructors privately to discuss specific needs.

IPASS (Individual Plan for Academic Student Success)

If at the time of your mid-term your grades reflect that you are at risk for failing some or all of your classes, you will be contacted by a representative of IPASS. The IPASS program is designed to help you gain control over your learning through pro-active communication and goal setting the development of intentional learning skills and study habits, and personal accountability. You may contact (906) 635-2887 or email ipass@lssu.edu if you would like to sign up early in the semester or if you have any questions or concerns.

HONOR PLEDGE

As a student of Lake Superior State University, you have pledged to support the Student Honor Code of the Lukenda School of Business. You will refrain from any form of academic dishonesty or deception such as cheating, stealing, plagiarism or lying on take-home assignments, homework, computer programs, lab reports, quizzes, tests or exams, which are Honor Code violations. Furthermore, you understand and accept the potential consequences of punishable behavior.

Tentative Course Outline

Escanaba

Class Schedule	Spring '18 BUSN 466 - Escanaba
-----------------------	---------------------------------------

Date: 01/19 Student Orientation: Review
 Business Project – Case Study vs. Business Plan
 • Introduction to Strategic Management - Chapter 1
 • Writing a Business Plan – Business Project

Statement of Project proposal: Students will present their ideas and interests for a Business Project

- Chapter 1 – Introduction
- Chapter 2 – Strategic Planning Process
- Chapter 3 – Strategic Formulation
- Chapter 4 – Business Model

Date: 01/20 • Strategic Planning Process – Chapter 2
 Project Proposal – Form 1 – Due 03/02/2018
 • Draft Project Proposal – 3 to 4 pages

- What will be the outcomes when it is done successfully?
- What will be the benefit from achieving these outcomes?
- For you
- For others
- Attach a copy of the generic outline for your type of project

 • Strategic Formulation – Chapter 3

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

- Conceptual Theories in Strategic Management
- Strategic Management Theories

Assignment I:

Prepare power point presentation on a Strategic Management Conceptual Theory Due 03/02/18

Assignment II: Due 03/03/2018 Micro-Lending – www.kiva.org

Date: 03/02

- **Strategic Management Conceptual Theory- presentations**

Refined statement of Project proposal

Individual research and brief journal: SWOT Analysis, Competition, Product. Offering, Keys to success, and critical issues.

• Individual Research and brief Journal: Target Markets, Financial Objectives. Group discussions – Individual presentations

- Chapter 5 – Resources
- Chapter 6 – Tactics
- Chapter 7 – Functional Level Planning
- Chapter 8 – Implementation, Evaluation, and Control

Date: 03/03

- **Strategic Management Conceptual Theory- presentations**
- **Writing a Business Plan – Business Project**

Individual research and brief journal: SWOT Analysis, Competition, Product. Offering, Keys to success, and critical issues.

Date: 04/13

- Group review of business projects
- **Major Field Test**

Date: 04/14

- Oral Presentations

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

**Selection of Project Type and Topic –
Form 1 – Part 1**

Prior to the development of the project proposal, students select a topic for their project. The topic is submitted to the Faculty for approval.

Date: _____ Degree Program: _____

Student(s) Name: _____

ID Number: _____

Address: _____

Telephone: _____

Email: _____

Name of Faculty Project Advisor: _____

Format: () Business Plan () Business/Industry Analysis () Marketing Plan

Brief Description of Topic:

If team project, name of other student(s):

Student Signature: _____ Date: _____

Action by Faculty Project Advisor: () Approved () Not Approved

Comments: _____

Signature: _____ Date: _____

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

Project Rationale

Form 1 – Part 2

(On this or a separate sheet of paper, present your rationale for choosing this topic.)

What about this project holds personal interest to you? (For example, for years you have wanted to have a small contracting business. Or, you have been interested in a specific Industry.)

What is your business reason for pursuing this project?

How will completing this project better prepare you for your work after you complete your degree?

LSSU Library APA Style

This is not a sample reference list. A reference list should be alphabetized.

BOOKS

- Encyclopedia Entry: Bergman, P.G. (1993). Relativity. In *The new encyclopedia Britannica* (Vol. 26, pp. 501-508). Chicago: Encyclopedia Britannica.
- Book: Beck, C.A.J., & Sales, B.D. (2001). *Family mediations: Facts, myths, and future prospects*. Washington, DC: American Psychological Association.
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PERIODICAL ARTICLES

- Magazine: Kandel, E.R., & Squire, L.R. (2000, November 10). Neuroscience: Breaking down scientific barriers. *Science*, 290, 1113-1120.
- Journal (paginated by issue): Klimoski, R. (1993). The ADA and the hiring process. *Consulting Psychology Journal: Practice and Research*, 45(2), 10-36.
- Journal (continuous pagination): Bekerian, D. A. (1993). Searching for the typical eyewitness. *American Psychologist*, 48, 574-576.
- Newspaper: Davis, J. (1993, July 15). Drug cuts heart failure risk. *New York Times*, p. A12.
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School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

APA Reference Guide

For information on citing electronic sources visit: <http://www.apastyle.org/electref.html>

ELECTRONIC SOURCES

- Multipage document
created by a private organization: Greater New Milford (CT) Area Healthy Community 2000, Task Force on Teen and Adolescent Issues. (n.d.). *Who has time for a family meal? You do!* Retrieved October 5, 2000, from <http://www.familymealtime.org>
- Chapter/Section in an
Internet document: Benton Foundation. (1998, July 7). Barriers to closing the gap. In *Losing ground bit by bit: Low-income communities in the information age* (chap. 2). Retrieved from <http://www.benton.org/Library/Low-Income/two.html>
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no author, no date: *GVU's 8th WWW user survey*. (n.d.). Retrieved August 8, 2000, from http://www.cc.utech.edu/~vu/user_surveys/survey-1997-10
- Message posted to a
discussion group: Strons, D.J. (2000, July 14). New resources for visual cognition [Msg 31]. Message posted to <http://groups.yahoo.com/group/visualcognition/message/31>
- Electronic copy of a journal
article from a database: Borman, W.C., Hanson, M.A., Oppler, S.F., Pulakos, E.D., & White, L.A. (1993). Role of early supervisory experience in supervisor performance. *Journal of Applied Psychology*, 78, 443-449. Retrieved October 23, 2000, from PsycARTICLES database.
- Internet articles based
on a print source: VandenBos, G., Knapp, S., & Doe, J. (2001). Role of reference elements in the selection of resources by psychology undergraduates [Electronic version]. *Journal of Bibliographic Research*, 5, 117-123.
- Daily newspaper article
available by search: Filts, P.J. (1999, February 16). In forecasting their emotions, most people flunk out. *New York Times*. Retrieved November 21, 2000, from <http://www.nytimes.com>
- Electronic books (e-books): Rothman, R. (1999). *Testing, teaching, and learning*. Retrieved August 30, 2001 from NetLibrary: <http://www.netlibrary.com>

For more information, see: *Publication manual of the American Psychological Association* (5th ed.). (2001). Washington, DC: American Psychological Association.

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

BUSN466 Business Plan – Grading Rubric

Student Name: _____ Business: _____	<u>Possible</u>	<u>Actual</u>
Executive Summary (65 points)	65	
<u>Management Plan (50)</u>	50	
The Company (5)		
Mission Statement (10 points)		
Intellectual Property /Company Location (5 points)		
Swot Analysis (10 points)		
Management & Organization (10)		
Management Team, Staffing, Board of Directors (10)		
<u>Technology Outline (20)</u>	20	
Internet, Hardware Needs, Software Needs		
<u>Econ & Finance (65)</u>	65	
<u>Industry Analysis (25)</u>		
Size and Growth Rate of the Industry (10 points)		
Trends (5 points)		
Opportunities (5 points)		
Barriers of Entry (5 points)		
<u>The Competition (55)</u>	55	
Competitors Direct-Indirect (10 points)		
Market Share Distribution (10 points)		
Competitive Advantages (10 points)		
Break even analysis (10)		
Financial Assumptions, Capital Requirements (15 points)		
<u>Legal and Social (20)</u>	20	
The Company (5)		
Ownership (10)		
Business license (5)		
Accounting (70)	70	
Monthly Profit and Loss Statement (20 points)		
Annual Income statements 3 years (20 points)		
Cash flow analysis (20 points)		
Balance Sheet (10 points)		
<u>Marketing (80)</u>	80	

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

Target Market (10 points)	
Market Analysis (10 points)	
Demographics (10 points)	
Positioning (5 points)	
Industry Trend (5 points)	
Company Strengths (5 points)	
Promotional Mix (15)	
Marketing Mix 4 p's (20)	
Critical Thinking (20)	20
Milestones & Exit Strategy (10)	
Goals, Strategies, Milestones, Risk Evaluation, Exit Plan (10)	
Appendix (20 points)	20
APA (20 points)	20
Grammar/punctuation/writing style (15 points)	15
Total	500

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

 **Lake Superior
State University**
BUSN – 466 - 099 Business Policy
Spring 2018

Prerequisites

Courses required of all business majors: Accounting Principles I and II, Statistics, Managerial Finance, Marketing Principles, Management Concepts and Applications (recommended but not currently required for Accounting and Finance-Econ majors), Human Resources Management, Data Processing – Spreadsheet, Business Government and Society, Business Law I&II, Business Communications (including experience with word processing software, presentation graphics, knowledge of APA report format, and use of library databases).

Instructor: Ralf Wilhelms, DBA
Office: 221 Considine Hall
Office Hours: By appointment

Email: rwilhelms@lssu.edu

Class Schedule: Fri-Sat
Class Location: Petoskey
Time: Friday 6:00 pm – 9:00 pm
Saturday 8:00 am – 3:00 pm
Phone: 906-635-2108

Required Text

Ralf Wilhelms and Shengxia Li (2015) Strategic Management: Integrated and Practical Approach. Whuham University Press, China

Recommended Text

Aaron, Jane E. (2000). Little, Brown Essential Handbook for Writers (3rd ed.). New York: Addison Wesley Longman. ISBN: 0-321-04970-5

Abrams, R. M. (2003). The successful business plan: Secrets & Strategies (4th ed.). Palo Alto, CA: The Planning Shop TM. ISBN: 0-9669635-6-3

Geoffrey Marczyk, David DeMotteo, David Festinger (2005). Essentials of Research Design and Methodology. Hoboken, NJ: John Wiley & Sons. ISBN: 0-471-47053-8

Course Description

Business Policy is a capstone course, which provides an opportunity for the student to develop an understanding of the interrelationship of the divisions, departments and functions of the “whole firm” and its environment. Students work in teams or as individuals under the guidance of their Faculty. Students identify original data sources, complete and present their project in written form and make an oral presentation form to faculty and classmates.

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

Course Goal

This course provides the student an opportunity to develop an understanding of the interrelationship of the divisions, departments and functions of the “whole firm” and its environment.

Course Objectives

Upon successful completion of this course, the student will be able to:

Overarching Objectives

- Synthesize and apply content from their undergraduate courses and other learning opportunities to better understand real world situations.
- Understand, integrate, and value the relationships across business disciplines
- Distinguish real world problems and demonstrate the application of solutions from theoretical frameworks and business practices.
- Analyze and compare the various techniques, strategies, and structures in Business.
- Analyze the strategy of a company, its business position, and how it can gain sustainable competitive advantage

Business Project: Business Plan Objective

- Assess/evaluate the requirements of a business plan, which includes appropriate background information.
- Organize the appropriate information required in a business plan.
- Construct a business plan that will satisfy the needs of entrepreneurs and potential investors

Project Options

Business Project – Business Plan

A Business plan includes a clear statement of the nature of a business venture, the business opportunity, the steps to be taken to capitalize on the opportunity, and the financial requirements. Key to a successful plan is substantiating the viability of the venture. Research in this option is primarily in quantifying the opportunity and the competitive situation. Business plans are used to acquire capital and to guide the operations.

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

Grading Scale and Policies:

<u>Point Values</u>		<u>Points</u>
Assignments		
Theory Presentation		100
Kiva.org – paper		100
Discussion Board		100
Business Plan		<u>500</u>
Total		800
100- 98% = A+		
97 – 92% = A	81 – 80% = B-	67 – 66% = D+
91 – 90% = A-	79 – 78% = C+	65 – 62% = D
89 – 88% = B+	77 – 70% = C	61 – 60% = D-
87 – 82% = B	69 – 68% = C-	59 – 0 % = F

Course Policies:

1. Completing assignments on time and keeping up with the class material is important for success in this course and in college. Late Assignments **will not be** accepted except for legitimate **pre-approved** reasons as determined by the instructor. Examples of legitimate reasons are: Severe illness, death in family, etc.
2. Students are expected to perform all assigned work themselves. Any form of cheating or plagiarism will be handled in accordance with the University policy on Academic Integrity:
<http://www.lssu.edu/academics/pdfs/Academic%20Integrity%20Policy.pdf>
3. Use of headphones, cell phones and hats during exams is prohibited.
4. All courses at LSSU are required to provide the students with an educationally challenging culminating experience; typically referred to as a final exam.
5. Cell phones must be turned off for all class and lab sessions. If the cell phone is on and rings, the student will be asked to leave the class for the day and this will count as an absence.

University Policies and Statements

The Americans with Disabilities Act & Accommodations

In compliance with Lake Superior State University policies and equal access laws, disability-related accommodations or services are available to students with documented disabilities.

If you are a student with a disability and you think you may require accommodations you must register with Disability Services (DS), which is located in the KJS Library, Room 130, (906) 635-2355 or x2355 on campus. DS will provide you with a letter of confirmation of your verified disability and authorize recommended accommodations. This authorization must be presented to your instructor before any accommodations can be made.

Students who desire such services should meet with instructors in a timely manner, preferable during the first week of class, to discuss individual disability related needs.

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

Any students who feel that an accommodation is needed – based on the impact of a disability – should meet with instructors privately to discuss specific needs.

IPASS (Individual Plan for Academic Student Success)

If at the time of your mid-term your grades reflect that you are at risk for failing some or all of your classes, you will be contacted by a representative of IPASS. The IPASS program is designed to help you gain control over your learning through pro-active communication and goal setting the development of intentional learning skills and study habits, and personal accountability. You may contact (906) 635-2887 or email ipass@lssu.edu if you would like to sign up early in the semester or if you have any questions or concerns.

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Tentative Course Outline

Petoskey

Class Schedule	Spring '18 BUSN 466 - Petoskey
-----------------------	---------------------------------------

Date: 01/26 Student Orientation: Review
 Business Project – Case Study vs. Business Plan
 • Introduction to Strategic Management - Chapter 1
 • Writing a Business Plan – **Business Project**

Statement of Project proposal: Students will present their ideas and interests for a Business Project

- Chapter 1 – Introduction
- Chapter 2 – Strategic Planning Process
- Chapter 3 – Strategic Formulation
- Chapter 4 – Business Model

Date: 01/27 • Strategic Planning Process – Chapter 2
 Project Proposal – **Form 1 – Due 03/16/2018**
 • Draft Project Proposal – 3 to 4 pages

- What will be the outcomes when it is done successfully?
- What will be the benefit from achieving these outcomes?
- For you
- For others
- Attach a copy of the generic outline for your type of project

 • Strategic Formulation – Chapter 3

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

- Conceptual Theories in Strategic Management
- Strategic Management Theories

Assignment I:

Prepare power point presentation on a Strategic Management Conceptual Theory Due 03/16/18

Assignment II: Due 03/17/2018 Micro-Lending – www.kiva.org

Date: 03/16 • **Strategic Management Conceptual Theory- presentations**

Refined statement of Project proposal

Individual research and brief journal: SWOT Analysis, Competition, Product Offering, Keys to success, and critical issues.

• Individual Research and brief Journal: Target Markets, Financial Objectives. Group discussions – Individual presentations

- Chapter 5 – Resources
- Chapter 6 – Tactics
- Chapter 7 – Functional Level Planning
- Chapter 8 – Implementation, Evaluation, and Control

Date: 03/17 • **Strategic Management Conceptual Theory- presentations**
• **Writing a Business Plan – Business Project**

Individual research and brief journal: SWOT Analysis, Competition, Product Offering, Keys to success, and critical issues.

Date: 04/20 • Group review of business projects
• **Major Field Test**

Date: 04/21 • Oral Presentations

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

**Selection of Project Type and Topic –
Form 1 – Part 1**

Prior to the development of the project proposal, students select a topic for their project. The topic is submitted to the Faculty for approval.

Date: _____ Degree Program: _____

Student(s) Name: _____

ID Number: _____

Address: _____

Telephone: _____

Email: _____

Name of Faculty Project Advisor: _____

Format: () Business Plan () Business/Industry Analysis () Marketing Plan

Brief Description of Topic:

If team project, name of other student(s):

Student Signature: _____ Date: _____

Action by Faculty Project Advisor: () Approved () Not Approved

Comments: _____

Signature: _____ Date: _____

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

Project Rationale

Form 1 – Part 2

(On this or a separate sheet of paper, present your rationale for choosing this topic.)

What about this project holds personal interest to you? (For example, for years you have wanted to have a small contracting business. Or, you have been interested in a specific Industry.)

What is your business reason for pursuing this project?

How will completing this project better prepare you for your work after you complete your degree?

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PERIODICAL ARTICLES

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- Journal (paginated by issue): Klimoski, R. (1993). The ADA and the hiring process. *Consulting Psychology Journal: Practice and Research*, 45(2), 10-36.
- Journal (continuous pagination): Bekerian, D. A. (1993). Searching for the typical eyewitness. *American Psychologist*, 48, 574-576.
- Newspaper: Davis, J. (1993, July 15). Drug cuts heart failure risk. *New York Times*, p. A12.
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School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

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created by a private organization: Greater New Milford (CT) Area Healthy Community 2000, Task Force on Teen and Adolescent Issues. (n.d.). *Who has time for a family meal? You do!* Retrieved October 5, 2000, from <http://www.familymealtime.org>
- Chapter/Section in an
Internet document: Benton Foundation. (1998, July 7). Barriers to closing the gap. In *Losing ground bit by bit: Low-income communities in the information age* (chap. 2). Retrieved from <http://www.benton.org/Library/Low-Income/two.html>
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- Electronic copy of a journal
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- Internet articles based
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- Electronic books (e-books): Rothman, R. (1999). *Testing, teaching, and learning*. Retrieved August 30, 2001 from NetLibrary: <http://www.netlibrary.com>

For more information, see: *Publication manual of the American Psychological Association* (5th ed.). (2001). Washington, DC: American Psychological Association.

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

BUSN466 Business Plan ~ Grading Rubric

Student Name: _____ Business: _____

	<u>Possible</u>	<u>Actual</u>
Executive Summary (65 points)	65	
<u>Management Plan (50)</u>	50	
The Company (5)		
Mission Statement (10 points)		
Intellectual Property /Company Location (5 points)		
Swot Analysis (10 points)		
Management & Organization (10)		
Management Team, Staffing, Board of Directors (10)		
<u>Technology Outline (20)</u>	20	
Internet, Hardware Needs, Software Needs		
<u>Ecoo & Finance (65)</u>	65	
<u>Industry Analysis (25)</u>		
Size and Growth Rate of the Industry (10 points)		
Trends (5 points)		
Opportunities (5 points)		
Barriers of Entry (5 points)		
<u>The Competition (55)</u>	55	
Competitors Direct-Indirect (10 points)		
Market Share Distribution (10 points)		
Competitive Advantages (10 points)		
Break even analysis (10)		
Financial Assumptions,		
Capital Requirements (15 points)		
<u>Legal and Social (20)</u>	20	
The Company (5)		
Ownership (10)		
Business license (5)		
<u>Accounting (70)</u>	70	
Monthly Profit and Loss Statement (20 points)		
Annual Income statements 3 years (20 points)		
Cash flow analysis (20 points)		
Balance Sheet (10 points)		
<u>Marketing (80)</u>	80	

School of Business
BUSN 466 Business Policy

Spring '18
3 Credits

Target Market (10 points)	
Market Analysis (10 points)	
Demographics (10 points)	
Positioning (5 points)	
Industry Trend (5 points)	
Company Strengths (5 points)	
Promotional Mix (15)	
Marketing Mix 4 p's (20)	
Critical Thinking (20)	20
Milestones & Exit Strategy (10)	
Goals, Strategies, Milestones, Risk Evaluation, Exit Plan (10)	
Appendix (20 points)	20
APA (20 points)	20
Grammar/punctuation/writing style (15 points)	15
Total	500

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	BUSN121 Syllabi
This documentation is relevant to Question number:	Part 1 Question #4
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides evidence that equivalent learning outcomes are achieved through traditional and online delivery methods.

Lukenda School of Business
BUSN 121 Introduction to Business

Spring '18
3 Credits



LAKE SUPERIOR STATE UNIVERSITY

BUSN121 Introduction to Business Spring 2018

Prerequisites: None

Instructor: Ralf Wilhelms, DBA

Office: 221 RW Considine Hall

Time: 6:00 p.m. to 7:20 p.m.

Class Schedule: Mon-Wed

Class Location: CON 104/105

Email: rwilhelms@lssu.edu

Phone: 906-635-2108

Office Hours:

Tuesday	Wednesday	Thursday
10:30 a.m. – 12:00 pm	9:30 a.m. - 11 a.m. 4:30 p.m. – 6 p.m.	10:30 a.m. – 12:00 p.m.

Required Text

Contemporary Business, 16th Edition, John Wiley & Sons.

ISBN_13 978-0-470-91073-3

Course Description

The course introduces students to the many facets of American business. Areas covered include the free enterprise system, the American and other economic systems; starting up a business, the functional areas of business including ownership, accounting, finance, marketing management of human resources, organization, production and marketing.

Course Goal

This course is a survey course, which introduces students to many aspects of business practice.

Course Objectives

Upon successful completion of the course, students will be able:

- Define the nature of business and its environment.
- Develop a general business vocabulary.
- Analyze the social changes affecting business today.
- Describe the effects of technology on the business environment
- Discuss the importance of the global market and the roles of comparative advantage and absolute advantage in global trade.
- Discuss various management concepts and organizational structures.
- Understand regulatory environment for business.
- Understand the evolution of Marketing and how marketing creates utility.
- Explain the relationship between marketing processes and consumer behavior.
- Demonstrates knowledge about general methods of financing business ventures.
- Explain the common ethical challenges faced by businesses.

Lukenda School of Business
BUSN 121 Introduction to Business

Spring '18
3 Credits

General Education Objectives:

This course is designed to meet the Social Science General Education Outcome. *LSSU graduates will be able to think critically and analytically about the causes and consequences of human behavior.*

Instructional Strategy

In order to accommodate a diverse range of student learning styles, the course format includes:

- Classroom Lectures
- Power Point Presentations
- Group Discussions
- Use of Blackboard

Grading Scale and Policies

<u>Point Values</u>	<u>Points</u>
Attendance and Participation	75
5 Exams	561
Complement Club	75
<u>5 Assignments @ 50 points each</u>	<u>250</u>
Total	961

Grading Scale and Policies:

100- 98% = A+	81 – 80% = B-	67 – 66% = D+
97 – 92% = A	79 – 78% = C+	65 – 62% = D
91 – 90% = A-	77 – 70% = C	61 – 60% = D-
89 – 88% = B+	69 – 68% = C-	59 – 0 % = F
87 – 82% = B		

Course Policies:

1. Completing assignments on time and keeping up with the class material is important for success in this course and in college. Late Assignments **will not** be accepted except for legitimate **pre-approved** reasons as determined by the instructor. Examples of legitimate reasons are: Severe illness, death in family, etc.
2. Students are expected to perform all assigned work themselves. Any form of cheating or plagiarism will be handled in accordance with the University policy on Academic Integrity:
<http://www.lssu.edu/academics/pdfs/Academic%20Integrity%20Policy.pdf>
3. Use of headphones, cell phones and hats during exams is prohibited.
4. All courses at LSSU are required to provide the students with an educationally challenging culminating experience; typically referred to as a final exam.
5. Cell phones must be turned off for all class and lab sessions. If the cell phone is on and rings, the student will be asked to leave the class for the day and this will count as an absence.

Lukenda School of Business
BUSN 121 Introduction to Business

Spring '18
3 Credits

University Policies and Statements

The Americans with Disabilities Act & Accommodations

In compliance with Lake Superior State University policies and equal access laws, disability-related accommodations or services are available to students with documented disabilities.

If you are a student with a disability and you think you may require accommodations you must register with Disability Services (DS), which is located in the KJS Library, Room 103, (906) 635-2355 or x2355 on campus. DS will provide you with a letter of confirmation of your verified disability and authorize recommended accommodations. This authorization must be presented to your instructor before any accommodations can be made.

Students who desire such services should meet with instructors in a timely manner, preferable during the first week of class, to discuss individual disability related needs. Any students who feel that an accommodation is needed – based on the impact of a disability – should meet with instructors privately to discuss specific needs.

IPASS (Individual Plan for Academic Student Success)

If at the time of your mid-term your grades reflect that you are at risk for failing some or all of your classes, you will be contacted by a representative of IPASS. The IPASS program is designed to help you gain control over your learning through pro-active communication and goal setting the development of intentional learning skills and study habits, and personal accountability. You may contact (906) 635-2887 or email ipass@lssu.edu if you would like to sign up early in the semester or if you have any questions or concerns.

HONOR PLEDGE

As a student of Lake Superior State University, you have pledged to support the Student Honor Code of the Lukenda School of Business. You will refrain from any form of academic dishonesty or deception such as cheating, stealing, plagiarism or lying on take-home assignments, homework, computer programs, lab reports, quizzes, tests or exams, which are Honor Code violations. Furthermore, you understand and accept the potential consequences of punishable behavior.

Lukenda School of Business
BUSN 121 Introduction to Business

Spring '18
3 Credits

Class Schedule	Spring '18 BUSN 121
Date: 01/15	Student Orientation: Review
Date: 01/17	• Chapter 1 - Changing the Face of Business Assignment 1 – Due 1/31/2018
Date: 01/22	• Chapter 2 - Business Ethics and Social Responsibility
Date: 01/24	• Chapter 3 - Economic Challenges Facing Contemporary Business
Date: 01/29	• Chapter 4 - Competing in World Markets
Date: 01/31	• Chapter 4 - Competing in World Markets
Date: 02/05	Exam I Chapters 1-4
Date: 02/07	• Chapter 5 – Forms of Business Ownership and Organization Assignment II – Due 02/21/2018
Date: 02/12	• Chapter 6 – Starting your Own Business: The Entrepreneurship Alternative – Complement Club – Start – Due 3/19/2018
Date: 02/14	• Chapter 6 – Starting your Own Business: The Entrepreneurship Alternative
Date: 02/19	• Chapter 7 – Management, Leadership and the Internal Organization
Date: 02/21	• Chapter 7 – Management, Leadership and the Internal Organization pg. 218 - 251
Date: 02/26	Exam II Chapter 5 – 7
Date: 02/28	• Chapter 8 - Human Resource Management Assignment III – Due 03/21/2018
Date: 03/12	• Chapter 8 - Human Resource Management
Date: 03/14	• Chapter 9 – Top Performance Through Empowerment, Teamwork and Communication
Date: 03/19	• Chapter 9 – Top Performance Through Empowerment, Teamwork and Communication
Date: 03/21	• Chapter 10 – Production and Operations Management
Date: 03/26	Exam III Chapters 8 – 10
Date: 03/28	• Chapter 11– Customer-Driven Marketing Assignment IV – Due 04/11/2018
Date: 04/02	• Chapter 11– Customer-Driven Marketing
Date: 04/04	• Chapter 12– Product and Distribution Strategies
Date: 04/09	• Chapter 13 – Promotion and Pricing Strategies
Date: 04/11	• Chapter 13 – Promotion and Pricing Strategies

Lukenda School of Business
BUSN 121 Introduction to Business

Spring '18
3 Credits

Date: 04/16 **Exam IV Chapters 11-13**

Date: 04/18 • Chapter 14 – Using Technology to Manage Information
Assignment V – Due 04/25/2018

Date: 04/23 • Chapter 15 – Understanding Accounting and Financial Statements

Date: 04/25 • Chapter 17 – Financial Management

Final Exam – 6:00 p.m. – 8:00 p.m. Considine Hall 104/105 April 30, 2018

School of Business
BUSN 121 Introduction to Business

Summer'17
3 Credits

 **Lake Superior
State University**
BUSN121 Introduction to Business
Summer 2017

Prerequisites: None

Instructor: Ralf Wilhelms, DBA
Office: 317 Library Building
Office Hours: by appointment
Email: rwilhelms@lssu.edu

Class Schedule: Online
Class Location: Blackboard
Time: 24/7
Phone: 906-635-2108
Skype: rwilhelms

Required Text

Contemporary Business, 14th Edition, John Wiley & Sons.
ISBN_13 978-0-470-91073-3

Course Description

The course introduces students to the many facets of American business. Areas covered include the free enterprise system, the American and other economic systems; starting up a business, the functional areas of business including ownership, accounting, finance, marketing management of human resources, organization, production and marketing.

Course Goal

This course is a survey course, which introduces students to many aspects of business practice.

Course Objectives

Upon successful completion of the course, students will be able:

- Define the nature of business and its environment.
- Develop a general business vocabulary.
- Analyze the social changes affecting business today.
- Describe the effects of technology on the business environment
- Discuss the importance of the global market and the roles of comparative advantage and absolute advantage in global trade.
- Discuss various management concepts and organizational structures.
- Understand regulatory environment for business.
- Understand the evolution of Marketing and how marketing creates utility.
- Explain the relationship between marketing processes and consumer behavior.
- Demonstrates knowledge about general methods of financing business ventures.
- Explain the common ethical challenges faced by businesses.

School of Business
BUSN 121 Introduction to Business

Summer'17
3 Credits

Instructional Strategy

In order to accommodate a diverse range of student learning styles, the course format includes:

- Classroom Lectures
- Power Point Presentations
- Group Discussions
- Use of Blackboard

Grading Scale and Policies

<u>Point Values</u>	<u>Points</u>
Discussion Board 10	100
4 Exams @ 100+ points each	400
<u>4 Assignments @ 50 points each</u>	<u>200</u>
Total	820

Grading Scale and Policies:

100- 98% = A+	81 – 80% = B-	67 – 66% = D+
97 – 92% = A	79 – 78% = C+	65 – 62% = D
91 – 90% = A-	77 – 70% = C	61 – 60% = D-
89 – 88% = B+	69 – 68% = C-	59 – 0 % = F
87 – 82% = B		

Behavioral Expectations/Attendance

Ground Rules:

1. Completing assignments on time and keeping up with the class material is important for success in this course and in college. Late Assignments **will not** be accepted except for legitimate **pre-approved** reasons as determined by the instructor. Examples of legitimate reasons are: Severe illness, death in family, etc.
2. Students are expected to perform all assigned work themselves. Any form of cheating or plagiarism will be handled in accordance with the Honor Code Procedures. Violations of the Honor Code may result in an F for the course grade.

Late Assignment Guidelines

- To avoid late penalty deductions, assignments should be submitted on or prior to the due date. Any work a student submits after the due date is subject to a corresponding point deduction. Work can only be accepted up to 7 days late unless arrangements were made with the instructor.
- For an extenuating circumstance, a student should not be penalized for late work, but only if he/she contacts the instructor prior to the due date to discuss

School of Business
BUSN 121 Introduction to Business

Summer '17
3 Credits

possible options. When circumstances are beyond the control of the student, an alternate due date will be set.

- Note: All work must be submitted by the last day of the class. Late policy does not apply to assignments due in week 8.

Weeks Late	Up to 1	Up to 2	Up to 3	Up to 4	More than 4
Total Point Deduction	10%	20%	30%	40%	50%

Discussion Board:

Threaded Discussion Posting Instructions – For each of the eight weeks of the course:

- Make original post by 11:59 PM Wednesday.
- Respond to substantially to a minimum of two posts after the day on which you make your original post.

Please review and keep in mind as you write your discussion posts and respond to your classmates. Quality, timeliness, and substance are critical factors.

The discussion grade is based on three criteria. These include the major post, the references, and the two responses. The major post should be at least three paragraphs in length. The responses should be at least a paragraph in length.

Assignments:

Assignments – Unless otherwise specified, all assignments must be created in Word files and submitted as attachments in your digital "Dropbox."

University Policies and Statements

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School of Business
BUSN 121 Introduction to Business

Summer'17
3 Credits

program is designed to help you gain control over your learning through pro-active communication and goal setting the development of intentional learning skills and study habits, and personal accountability. You may contact (906) 635-2887 or email ipass@lssu.edu if you would like to sign up early in the semester or if you have any questions or concerns.

HONOR PLEDGE

As a student of Lake Superior State University, you have pledged to support the Student Honor Code of the Department of Business, Entrepreneurship and Legal Studies. You will refrain from any form of academic dishonesty or deception such as cheating, stealing, plagiarism or lying on take-home assignments, homework, computer programs, lab reports, quizzes, tests or exams, which are Honor Code violations. Furthermore, you understand and accept the potential consequences of punishable behavior.

School of Business
BUSN 121 Introduction to Business

Summer '17
3 Credits

Class Schedule	Summer '17 BUSN 121
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Week 1

Date: 05/08 Student Orientation: Review
 • Chapter 1 - Changing the Face of Business
Assignment 1 – Due 5/28/2017

Week 2

Date: 05/15 • Chapter 2 - Business Ethics and Social Responsibility
 • Chapter 3 - Economic Challenges Facing Contemporary Business

Week 3

Date: 05/22 • Chapter 4 - Competing in World Markets
 • **Exam I Chapters 1-4**

Week 4

Date: 05/29 • Chapter 5 – Forms of Business Ownership and Organization
Assignment II – Due 6/18/2017

Week 5

Date: 06/05 • Chapter 6 – Starting your Own Business: The Entrepreneurship
 • Chapter 7 – Management, Leadership and the Internal Organization

Week 6

Date: 06/12 • Chapter 8 - Human Resource Management
Exam II Chapter 5 - 8

Week 7

Date: 06/19 • Chapter 9 – Top Performance Through Empowerment, Teamwork and
 Communication
Assignment III – Due 7/09/2017

Week 8

Date: 06/26 • Chapter 10 – Production and Operations Management
 • Chapter 11– Customer-Driven Marketing

Week 9

Date: 07/03 • Chapter 12– Product and Distribution Strategies
Exam III Chapters 9 – 12

Week 10

Date: 07/10 • Chapter 13 – Promotion and Pricing Strategies
Assignment IV – Due 7/25/2017

School of Business
BUSN 121 Introduction to Business

Summer'17
3 Credits

Week 11

Date: 07/17 • Chapter 14– Product and Distribution Strategies
• Chapter 15 – Promotion and Pricing Strategies

Week 12

Date: 07/24 • Chapter 16 – The Financial System
• **Final Exam - Exam IV Chapters 13-16**

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	ACBSP Quality Assurance Report Feedback
This documentation is relevant to Question number:	Part 1 Question #5
Briefly summarize the content of the file and its value as evidence supporting program review:	The document contains the feedback received from the school's accrediting body in response to LSB's Quality Assurance Report submitted in 2016.

From: Steve Parscale, Ph.D.
Sent: Tuesday, March 28, 2017 7:52 AM
To: 'mmcready2@lssu.edu' <mmcready2@lssu.edu>
Cc: Diana Hallerud <dianahallerud@acbsp.org>; Cari Hunziker <chunziker@acbsp.org>; 'lschmitigal@lssu.edu' <lschmitigal@lssu.edu>
Subject: ACBSP QA Feedback 2016 for Lake Superior State University
Importance: High

Dear Mindy,

The board of commissioners met November 17, 2016 and reviewed your quality assurance report.

The board members provided the following feedback for the business programs at Lake Superior State University:

Remove the Condition on Criterion 6.1.4.b.

Remove the Notes on Criterion 4.4.

Remove the Notes on Criterion 6.1.3.

Maintain the Notes on Criterion 3.3. While listening and learning methods for various stakeholders are addressed, a periodic review of these methods was neither articulated nor apparent. Such a review may benefit LSB's efforts to assure that educational services are current and relevant.

Maintain the Notes on Criterion 3.4. Although stakeholder input is part of planning efforts and service improvements, the integration of feedback from stakeholders appears to be an informal process. A formal, systematic process may provide valuable information which could be used to proactively impact performance.

Maintain the Notes on Criterion 5.3.2.b. Historically, accredited programs should have at least 40 percent of the undergraduate credit hours in business and 70 percent of the graduate credit hours in business taught by academically qualified (AQ) faculty members. Please develop a plan to meet these goals or present a rationale for the difference and provide detailed records of student learning outcomes (SLO) to demonstrate that your faculty composition supports your mission and program objectives.

Your next Quality Assurance Report is due September 15, 2018. Your reaffirmation is due in 2024.

Best Regards,

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Employment Report
This documentation is relevant to Question number:	Part 1 Question #6
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides detail on where recent LSB graduates obtained employment.

Lakeland School of Business
2016-2017 Graduates

Last Name	First Name	Degree	Major	Major Description	SITE_DESC	Employer	Position
		BS	ACTG	Accounting	Petoskey Regional Center	Bay View Association - United Meth. Church	Accounts Payable Analyst
		BS	BUSK	Business Admin-Marketing	LSSU Main Campus	Wedding Wire	Account Associate
		BS	BUSN	Business Administration	LSSU Main Campus	DXC Technology	
		BS	BUSM	Business Admin-Management	Petoskey Regional Center	Michigan State Police	Trooper
		BS	BUSK	Business Admin-Marketing	LSSU Main Campus	Central Savings Bank	Marketing Director
		BS	ACTG	Accounting	LSSU Main Campus	Sault Area Schools	Staff Accountant
		BS	BUSM	Business Admin-Management	LSSU Main Campus	Metropolitan Capital Bank & Trust	Wealth Consulting Manager
		BS	BUSK	Business Admin-Marketing	LSSU Main Campus	Comcast Spotlight	Account Executive
		BS	BUSM	Business Admin-Management	Petoskey Regional Center	McLaren Health Care	Senior Revenue Analyst
		BS	BUSK	Business Admin-Marketing	LSSU Main Campus	Stryker Medical	Associate Field Technician
		BS	ACTG	Accounting	LSSU Main Campus	Anesthesia Business Consultants	Accountant
		BS	BUSM	Business Admin-Management	LSSU Main Campus	Compa Bay Lightning	Professional Hockey Player
		BS	ACTG	Accounting	LSSU Main Campus	Hagerty Insurance	Temp Claims
		BS	BUSN	Business Administration	LSSU Main Campus	Century 21	Office Manager
		BS	BUSN	Business Administration	Petoskey Regional Center	Hagerty Insurance	License Sales Agent
		BS	FINC	Finance and Economics	LSSU Main Campus	Crestmark Bank	Debtor Analyst
		BS	BUSK	Business Admin-Marketing	LSSU Main Campus	International Speedway Corporation	Ticketing Sales Executive
		A	TATG	Technical Accounting	LSSU Main Campus	Helen Newberry Joy Hospital	Drug Screen Coord./Lab Director Assist
		BS	FINC	Finance and Economics	LSSU Main Campus	Quad City Mallards	Professional Hockey Player
		BS	ACTG	Accounting	LSSU Main Campus	Commonwealth Management Corporation	Staff Accountant
		BS	BUSM	Business Admin-Management	LSSU Main Campus	LSSU Student Life	Residence Hall Coordinator
		BS	FINC	Finance and Economics	LSSU Main Campus	Hagerty Insurance	Claims Adjuster
		BS	BUSI	Business Admin-Int'l Business	LSSU Main Campus	Alloy Corporation	Research & Adjustments Associate
		BS	ACTG	Accounting	Petoskey Regional Center	J. Cesano Builders	Accountant
		BS	BUSM	Business Admin-Management	LSSU Main Campus	LSSU Arts Center	Technical Manager
		BS	ACTG	Accounting	Escanaba Regional Center	Bay de Noc Community College	TRIO Peer Tutor
		BS	ACTG	Accounting	Escanaba Regional Center	Bay de Noc Community College	Senior Accountant
		BS	BUSK	Business Admin-Marketing	LSSU Main Campus	Wendmere Homes & Estates	Real Estate Agent
		BS	BUSM	Business Admin-Management	LSSU Main Campus	Pellston ARFF	Office Administrator
		BS	FINC	Finance and Economics	LSSU Main Campus	Dezato	Associate Data Analyst
		BS	ACTG	Accounting	LSSU Main Campus	University of Michigan - Film	Graduate Student
		BS	ACTG	Accounting	LSSU Main Campus	Anderson, Tackman & Co.	Staff Accountant
		BS	BUSN	Business Administration	LSSU Main Campus	Rasmussen, Taylor, O'Neil & Christman	Staff Accountant
		BS	ACTG	Accounting	LSSU Main Campus	Asahi Kasei Plastics	Accounts Payable Coordinator
		BS	BUSM	Business Admin-Management	LSSU Main Campus	United Rentals	Inside Sales Representative
		BS	BUSK	Business Admin-Marketing	LSSU Main Campus	Cwikas	Management Trainee
		BS	FINC	Finance and Economics	LSSU Main Campus	HNI Risk Services	Account Associate
		BS	BUSM	Business Admin-Management	LSSU Main Campus	Farmers Insurance	Claims Representative
		BS	ACTG	Accounting	LSSU Main Campus	Sacred Heart Major Seminary	Student
		BS	ACTG	Accounting	LSSU Main Campus	Way Memorial Hospital	Staff Accountant
		BS	BUSM	Business Admin-Management	Petoskey Regional Center	Health Department of Michigan	Administrative Office Manager
		BS	BUSM	Business Admin-Management	LSSU Main Campus	Brittan Inc.	Digital Operator
		BS	ACTG	Accounting	LSSU Main Campus	mBank - Marquette, MI	Deposit Operations Specialist
		BS	ACTG	Accounting	LSSU Main Campus	Anderson, Tackman & Co.	Staff Accountant
		BS	BUSK	Business Admin-Marketing	LSSU Main Campus	Bay Mills Community College	TRIO/SSS Prof. Math Tutor
		BS	ACTG	Accounting	LSSU Main Campus	First Bank of Upper Michigan	Working with CFO
		A	SBUS	Small Business Administration	LSSU Main Campus	KCM Technical/Flat Chrysler	Customer Service Representative
		BS	ACTG	Accounting	Petoskey Regional Center	Harris Group, CPA's	Staff Accountant

Lukens School of Business
2017-2018 Graduates

Last Name	First Name	Degree	Major Description	Position	Employer
		BS	Business Administration	Terminal Operations Manager	Capital Express, Inc.
		BS	Business Administration	Account Manager	Imperial Beverage
		BS	Finance and Economics	Food/Beverage Manager	Eagle Glen Golf Course
		BS	Business Administration - Management	Graduate Student	Central Michigan University
		BS	Business Administration - Management & Marketing	Front Desk Agent	Kewadin Casinos
		BS	Business Administration - Marketing	Procurement Specialist	Jeta
		BS	Accounting	Staff Accountant	Hantz Group
		BS	Accounting	Staff Accountant	Anderson, Tackman & Co.
		BS	Business Administration - Marketing	Marketing Coordinator	Go North Properties
		BS	Business Administration - Management	Bookkeeping Dept.	Central Savings Bank
		BS	Finance and Economics	Internship	Hantz Group
		BS	Accounting	Title IX Deputy Coordinator	LSSU
		BS	Business Administration - Management	QC Technician	Payne and Dolan, Inc.
		BS	Business Administration - Management	Logistics Analyst	Penake Corporation
		BS	Finance and Economics	BSA/AML Officer	First National Bank
		BS	Accounting	Accountant	Baird, Cotter & Bishop
		BS	Business Administration - Marketing	Professional Hockey Player	Greenville Swamp Rabbits
		A	Technical Accounting	Accounting Clerk	Cloverland Electric Cooperative
		BS	Business Administration - Marketing	Student - MBA Marketing	Central Michigan University
		A	Technical Accounting	Pursuing BS in Advert/PR	Grand Valley State University
		BS	Accounting	Assurance Associate	Price Waterhouse Coopers
		BS	Accounting & Business Administration - Management	Payroll Clerk	MJ Electric
		BS	Business Administration	Student/Graphic Arts	NCMC
		BS	Business Administration - Entrepreneurship	Graduate Student	Merrimack College
		BS	Finance and Economics	Junior Financial Advisor	Edward Jones
		BS	Business Administration - Marketing	Content Marketing Specialist	Working Person Enterprises
		A	Small Business Administration	Instructor	Sault College
		BS	Business Administration	Administrative Assistant	LSSU Escanaba Regional Center
		BS	Accounting & Finance and Economics	Assoc. Financial Analyst	Novelis
		BS	Accounting	Staff Accountant	Johnson Brothers Liquor Company
		BS	Accounting	Accounts Receivable Specialist	Britten Inc.
		BS	Business Administration - Management	Internship	Walt Disney World
		BS	Accounting	Assistant Controller	Johnson Oil & Propane Company
		BS	Business Administration - Marketing	Outside Sales Trainee	Fastenal
		BS	Business Administration - Management	Owner	Cleaning Business
		BS	Accounting	Staff Accountant	Bossy Nagy Group
		BS	Accounting	Accountant	Hantz Group
		BS	Accounting	Staff Accountant	Lindsay, Crabb & Associates
		BS	Business Administration - Management	Cashier Customer Service	Circle's
		BS	Finance and Economics	Financial Advisor	Edward Jones
		BS	Business Administration	Store Manager	Rite Aid

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Assessment Report
This documentation is relevant to Question number:	Part 1 Question #7
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides assessment data for three of the LSB's school-level goals.

Assessment: Planning Unit Four Column

School: Planning - Lukenda School of Business

<i>Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>Desirable School of Choice - LSB will attract an increasing number of students who are academically prepared and reflective of society's diversity.</p> <p>Goal Status: Active</p> <p>Goal Type: Operational Goal, not related to student learning</p> <p>Strategic Plan Outcome(s) addressed: E1. We will cultivate, maintain, and support an enrollment management strategic plan that will center on programs and activities that reach enrollment goals.</p>	<p>Student Enrollment Growth Rate</p> <p>Benchmark: The LSB will achieve an annual growth rate of 3% for each of its programs. The LSB's current goal is to have at least 300 students by fall 2020.</p> <p>Schedule/Notes: Student enrollment is measured each fall semester. Students pursuing multiple degrees are tracked in their primary program and only counted once. The enrollment growth rate is calculated using the change in the number of students in each program from one fall semester to the next.</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: No</p> <p>Total LSB student enrollment declined 11.52% from fall 2015 to fall 2016.</p> <p>Program Enrollment Growth Rates:</p> <p>Accounting = 0%</p> <p>Business Administration = -29% (6 less students)</p> <p>Business Administration - Entrepreneurship = 63% (5 more students)</p> <p>Business Administration - International Business = -15% (2 less students)</p> <p>Business Administration - Management = -28% (23 less students)</p> <p>Business Administration - Marketing = -7% (3 less students)</p> <p>Finance & Economics = 8% (2 more students)</p> <p>Small Business Administration = -57% (4 less students)</p> <p>Technical Accounting = 0% (11/02/2018)</p>	<p>Use of Result: Total LSB enrollment increased from fall 2012 to fall 2013 then has decreased each fall for the last 3 years. LSB attributes its declining enrollment to a few key factors. One is that the number of nontraditional students enrolled in LSB programs has declined due to a strengthened economy. Another is that the size of high school graduating classes in Northern Michigan is decreasing. One more factor is that total LSSU enrollment has declined. The LSB has made increasing enrollment in all of its programs a top priority and has taken many initiatives recently to attract students. Examples include hosting events that bring high school students to campus, publicizing accomplishments of students, staff and faculty and contacting admitted students. (11/03/2018)</p>
		<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: No</p> <p>Total LSB student enrollment declined 11.34% from fall</p>	<p>Use of Result: LSB's smaller programs (in terms of enrollment), Finance &</p>

Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
		<p>2016 to fall 2017.</p> <p>Program Enrollment Growth Rates: Accounting = -11% (8 less students) Business Administration = 80% (12 more students) Business Administration - Entrepreneurship = 15% (2 more students) Business Administration - International Business = -27% (3 less students) Business Administration - Management = -22% (13 less students) Business Administration - Marketing = -26% (10 less students) Finance & Economics = -19% (5 less students) Small Business Administration = 0% Technical Accounting = -100% (2 less students) (11/02/2018)</p>	<p>Economics, Entrepreneurship and International Business, showed fluctuations in enrollment over the last 5 years. LSB's larger programs, accounting, management and marketing, experienced declining enrollment each year over the last 5 years. The LSB has used this data to design appropriate initiatives to attract students. Due to these efforts, LSB's enrollment decline from fall 2016 to fall 2017 was lower than that of the previous year. In addition, preliminary numbers for fall 2018 indicate total LSB enrollment will remain roughly the same as fall 2017. (11/03/2018)</p>
<p>Student Experience - LSB will provide students with a supportive and connected experience to enhance student development. Goal Status: Active Goal Type: Operational Goal, not related to student learning Strategic Plan Outcome(s) addressed: C2. We cultivate open communication, engagement, and behaviors that strengthen community, across campus and in the wider region.</p>	<p>Freshmen to Sophomore Student Retention Rate</p> <p>Benchmark: The LSB will increase the freshmen retention rate of each of its programs annually with the ultimate goal of achieving an 80% school retention rate. Schedule/Notes: The freshman retention rate is the percentage of first-time students who return for their sophomore year. The retention rate is measured from each fall semester to the next fall semester.</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2015 to Fall 2016 LSB Retention Rate = 88%</p> <p>Program Retention Rates: Accounting = 100% Business Administration = 100% Business Administration - Entrepreneurship = 67% Business Administration - International Business = N/A (No freshman students entered the program in fall 2015.) Business Administration - Management = 83% Business Administration - Marketing = 78% Finance & Economics = 100% Small Business Administration = N/A (No freshman students entered the program in fall 2015.) Technical Accounting = N/A (No freshman students entered the program in fall 2015.) (11/02/2018)</p>	<p>Use of Result: The LSB believes student retention is vital to the success of its programs, especially during times of declining enrollment. LSB faculty and staff now contact students each semester who haven't yet registered for the next semester's classes. Besides encouraging many students to register, this practice provides valuable information on why students choose to leave LSSU. Most students indicate they are leaving for personal reasons like family or finances. Others noted areas the LSB can influence include advising, academic support, course scheduling and faculty recruitment and retention. (11/03/2018)</p>

Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
		<p>Finding Reporting Year: 2017-2018 Goal met: No Fall 2016 to Fall 2017 LSB Retention Rate = 65%</p> <p>Program Retention Rates: Accounting = 100% Business Administration = 67% Business Administration - Entrepreneurship = 50% Business Administration - International Business = 0% Business Administration - Management = 50% Business Administration - Marketing = 50% Finance & Economics = 75% Small Business Administration = N/A (No freshman students entered the program in fall 2016.) Technical Accounting = N/A (No freshman students entered the program in fall 2016.) (11/02/2018)</p>	<p>Use of Result: Measuring overall retention rates for the School provides more useful data due to the small cohort of freshman students in many LSB programs. For example, the International Business program experienced a 0% retention rate in 2017 because neither of the two freshman students who entered the program in fall 2016 returned for the fall 2017 semester. According to the senior survey administered each semester, LSB students believe the business faculty and the personal education delivered are the School's greatest strengths. Examples of how LSB faculty and staff have recently capitalized on these strengths to retain students include adopting an open-door policy for academic and advising assistance, engaging students outside of the classroom through co-curricular events and developing a mandatory first-year experience course. (11/03/2018)</p>
<p>Student Learning and Development - LSB will maintain and develop excellent programs for students which provide experiential learning activities that capitalize on this unique region. Goal Status: Active Goal Type: Operational Goal, not related to student learning Strategic Plan Outcome(s) addressed: A3. We will cultivate</p>	<p>Six-Year Graduation Rate</p> <p>Benchmark: The LSB will increase the graduation rate of each of its programs annually with the ultimate goal of achieving a 60% school graduation rate. Schedule/Notes: A program graduation rate is the percentage of students who begin in a business</p>	<p>Finding Reporting Year: 2016-2017 Goal met: No LSB Fall 2011 Cohort Graduation Rate = 47%</p> <p>Bachelor Degree Program Graduation Rates: Accounting = 43% Business Administration = N/A (No freshman students entered the program in fall 2011.) Business Administration - Entrepreneurship = 50% Business Administration - International Business = 0% Business Administration - Management = 23%</p>	<p>Use of Result: After experiencing a downward trend for two years, the overall LSB graduation rate increased this year. The LSB learned many students begin in one business degree program then transfer to another LSB program before graduation. This negatively impacts the graduate rate of individual programs. LSB attributes this to the LSSU</p>

<i>Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>programs that support individual growth within the curricular, co-curricular, and non-curricular realms culminating in degree completion and endorsement of lifelong learning.</p>	<p>bachelor program and earn a bachelor degree in that particular area within 6 years. The LSB graduation rate is the percentage of students who begin in a business bachelor program and earn any business bachelor degree within 6 years.</p>	<p>Business Administration - Marketing = 36% Finance & Economics = N/A (No freshman students entered the program in fall 2011.) (11/02/2018)</p>	<p>requirement that students must declare a major upon admission to the University. Another reason is that the common professional component of each LSB bachelor degree is the same, so students don't fall behind if they change business majors during their first two years. (11/03/2018)</p>
		<p>Finding Reporting Year: 2017-2018 Goal met: No LSB Fall 2012 Cohort Graduation Rate = 39%</p> <p>Bachelor Degree Program Graduation Rates: Accounting = 45% Business Administration = N/A (No freshman students entered the program in fall 2012.) Business Administration - Entrepreneurship = 0% Business Administration - International Business = 0% Business Administration - Management = 7% Business Administration - Marketing = 33% Finance & Economics = 67% (11/02/2018)</p>	<p>Use of Result: LSSU and the LSB have concentrated on increasing graduation rates through improved academic advising practices. New initiatives pursued during the reporting period include increased communication between the Registrar's Office and academic departments related to students who have applied to graduate. In addition, the Registrar's Office now sends an email message to students after they apply to graduate that lists the requirements they are missing. LSSU also began using Ellucian Degree Works as its academic advising and degree audit program. LSB faculty and students have taken advantage of the program's capabilities. (11/03/2018)</p>

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Business Course Qualifications
This documentation is relevant to Question number:	Part 1 Question #11
Briefly summarize the content of the file and its value as evidence supporting program review:	The document summarizes the minimum qualifications needed to teach each business course as established by LSB faculty.

Lakenda School of Business - Final October 2017

Disciplinary Field/Subfield	Courses within the Field/Subfield	Minimal Faculty Qualifications - see below	Desired Minimum Academic Credential	Comments & the Desired Tested Experience	Faculty - cite credentials and other factors including rationale and documentation related to tested experience
		see below		The Lakenda School of Business may determine that a faculty member is qualified to teach a specific course based on tested experience that is deemed equivalent to an academic credential. This experience will be tested by review of the candidate's graduate transcript, resume or curriculum vitae and certifications of training, courses or achievements, along with a documented discussion with the individual regarding how his or her experience relates to the content of the course.	
Accounting	ACTG132 - Principles of Accounting I ACTG133 - Principles of Accounting II	see below	Master's degree in a business-related field		Robert Boston - Master of Science in Finance Marta Diaz - Master of Accountancy Mindy McCready - Master of Business Administration Valerie Phillips - Master of Business Administration Jody Rebek - Tested Experience Gerald Root - Master of Business Administration Ralf Wilhelms - Doctor of Business Administration
Accounting	ACTG232 - Intermediate Accounting I ACTG233 - Intermediate Accounting II ACTG332 - Cost Management I ACTG333 - Cost Management II ACTG350 - Income Tax Practicum ACTG421 - Federal Taxation I ACTG422 - Federal Taxation II ACTG427 - Auditing ACTG432 - Advanced Accounting ACTG433 - Advanced Accounting II	see below	One of the following: - Master's degree in accounting - Master's degree in a business-related field and 18 graduate credit hours in accounting		Marta Diaz - Master of Accountancy Mindy McCready - Tested Experience
Accounting	ACTG334 - Accounting Information Systems	see below	One of the following: - Master's degree in accounting - Master's degree in a business-related field and 18 graduate credit hours in accounting		Marta Diaz - Master of Accountancy Mindy McCready - Tested Experience Ralf Wilhelms - Tested Experience
Business	BUSN121 - Introduction to Business BUSN211 - Business Statistics BUSN231 - Business Communications BUSN308 - Managing Cultural Differences BUSN403 - Business, Government & Society BUSN405 - Business Ethics & Social Responsibility BUSN465 - Business Policy	see below	Master's degree in a business-related field		Robert Boston - Master of Science in Finance Marta Diaz - Master of Accountancy Mindy McCready - Master of Business Administration Valerie Phillips - Master of Business Administration Jody Rebek - Tested Experience Gerald Root - Master of Business Administration Ralf Wilhelms - Doctor of Business Administration
Business	BUSN350 - Business Law I BUSN355 - Business Law II	see below	Juris Doctor/Bachelor of Laws		Madan Saluja - Bachelor of Laws
Economics	ECON201 - Principles of Macroeconomics ECON202 - Principles of Microeconomics	see below	Master's degree in a business-related field		Robert Boston - Master of Science in Finance Marta Diaz - Master of Accountancy Mindy McCready - Master of Business Administration Valerie Phillips - Master of Business Administration Jody Rebek - Tested Experience Gerald Root - Master of Business Administration Ralf Wilhelms - Doctor of Business Administration
Economics	ECON302 - Managerial Economics ECON304 - Money, Banking & Monetary Policy ECON305 - Public Finance ECON307 - Environmental Economics ECON308 - Intermediate Microeconomics ECON309 - Intermediate Macroeconomics ECON407 - Introductory Econometrics	see below	One of the following: - Master's degree in economics - Master's degree in finance - Master's degree in a business-related field and 18 graduate credit hours in economics		Robert Boston - Master of Science in Finance Marta Diaz - Master of Science in Finance Gerald Root - 18 graduate credits in Finance/Economics

Economics	ECON408 – International Economics	see below	One of the following: <ul style="list-style-type: none"> • Master's degree in economics • Master's degree in international business • Master's degree in a business-related field and 18 graduate credit hours in economics 	Robert Boston - 18 graduate credits in Finance/Economics Marta Diaz - Master of Science in Finance Gerald Root - 18 graduate credits in Finance/Economics Ralf Wilhelms - Master of International Business Administration
Finance	FINC242 - Personal Finance FINC245 - Principles of Finance	see below	Master's degree in a business-related field	Robert Boston – Master of Science in Finance Marta Diaz – Master of Accountancy Mindy McCready – Master of Business Administration Valerie Phillips – Master of Business Administration Gerald Root – Master of Business Administration Ralf Wilhelms – Doctor of Business Administration
Finance	FINC243 – Real Estate FINC341 – Managerial Finance FINC443 – Insurance FINC445 – Financial Analysis & Policy FINC443 – Investment Strategy	see below	One of the following: <ul style="list-style-type: none"> • Master's degree in finance • Master's degree in a business-related field and 18 graduate credit hours in finance 	Robert Boston - Master of Science in Finance Marta Diaz - Master of Science in Finance Gerald Root - 18 graduate credits in Finance/Economics
International Business	INTB393 – Competing in the Global Marketplace INTB420 – International Comparative Management	see below	One of the following: <ul style="list-style-type: none"> • Master's degree in international business • Master's degree in a business-related field and 18 graduate credit hours in international business 	Ralf Wilhelms - Master of International Business Administration
International Business	INTB375 – International Business Law	see below	One of the following: <ul style="list-style-type: none"> • Master's degree in international business • Juris Doctor/Bachelor of Laws • Master's degree in a business-related field and 18 graduate credit hours in international business 	Madan Saluja - Bachelor of Laws Ralf Wilhelms - Master of International Business Administration
International Business	INTB486 - International Marketing	see below	One of the following: <ul style="list-style-type: none"> • Master's degree in international business • Master's degree in marketing • Master's degree in a business-related field and 18 graduate credit hours in international business 	Valerie Phillips - 18 graduate credits in marketing Ralf Wilhelms - Master of International Business Administration
Management	MGMT280 - Intro to Management Info Systems	see below	Master's degree in a business-related field	Robert Boston – Master of Science in Finance Marta Diaz – Master of Accountancy Mindy McCready – Master of Business Administration Valerie Phillips – Master of Business Administration Jody Rebek – Tested Experience Gerald Root – Master of Business Administration Ralf Wilhelms – Doctor of Business Administration
Management	MGMT360 – Management Concepts & Applications	see below	One of the following: <ul style="list-style-type: none"> • Master's degree in management • Master's degree in a business-related field and 18 graduate credit hours in management 	Robert Boston – Tested Experience Marta Diaz – 18 graduate credits in Management Mindy McCready – 18 graduate credits in Management Valerie Phillips – Tested Experience Jody Rebek – 18 graduate credits in Management Gerald Root – Tested Experience Madan Saluja - 18 graduate credits in Management Ralf Wilhelms – 18 graduate credits in Management
Management	MGMT371 – Operations & Business Analytics	see below	One of the following: <ul style="list-style-type: none"> • Master's degree in management • Master's degree in a business-related field and 18 graduate credit hours in management 	Marta Diaz – 18 graduate credits in Management Jody Rebek – 18 graduate credits in Management Ralf Wilhelms – 18 graduate credits in Management
Management	MGMT365 – Human Resource Management	see below	One of the following: <ul style="list-style-type: none"> • Master's degree in human resources • Master's degree in a business-related field and 18 graduate credit hours in human resources 	Jody Rebek - 18 graduate credits in Human Resources Madan Saluja - 18 graduate credits in Human Resources

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Management	MGMT386 - Principles of Leadership	see below	One of the following: - Master's degree in management - Master's degree in a business-related field and 18 graduate credit hours in management or leadership	Robert Boston - Tested Experience Marta Diaz - 18 graduate credits in Management Jody Rebek - Master of Art in Leadership Gerald Root - Tested Experience Madin Saluja - 18 graduate credits in Management Ralf Wilhelms - 18 graduate credits in Management
Management	MGMT464 - Organizational Behavior MGMT476 - Employee Training & Development	see below	One of the following: - Master's degree in management - Master's degree in a business-related field and 18 graduate credit hours in management or leadership	Marta Diaz - 18 graduate credits in Management Jody Rebek - Master of Art in Leadership Ralf Wilhelms - 18 graduate credits in Management
Management	MGMT451 - Labor Law	see below	One of the following: - Master's degree in human resources - Master's degree in a business-related field and 18 graduate credit hours in human resources	Madin Saluja - 18 graduate credits in Human Resources
Management	MGMT469 - Collective Bargaining	see below	One of the following: - Master's degree in human resources - Master's degree in a business-related field and 18 graduate credit hours in human resources	Jody Rebek - 18 graduate credits in Human Resources Madin Saluja - 18 graduate credits in Human Resources
Marketing	MRKT281 - Marketing Principles & Strategy	see below	Master's degree in a business-related field	Robert Boston - Master of Science in Finance Marta Diaz - Master of Accountancy Mindy McCready - Master of Business Administration Valerie Phillips - Master of Business Administration Gerald Root - Master of Business Administration Ralf Wilhelms - Doctor of Business Administration
Marketing	MRKT283 - Principles of Selling MRKT379 - Sports and Events Marketing MRKT381 - Consumer Behavior MRKT383 - E-Marketing MRKT387 - Advertising Theory & Practice MRKT388 - Retail Management MRKT480 - Marketing Research MRKT481 - Advertising Management	see below	One of the following: - Master's degree in marketing - Master's degree in a business-related field and 18 graduate credit hours in marketing	Valerie Phillips - 18 graduate credits in Marketing Ralf Wilhelms - 18 graduate credits in Marketing
Marketing	MRKT385 - Services Marketing	see below	One of the following: - Master's degree in marketing - Master's degree in a business-related field and 18 graduate credit hours in marketing	Valerie Phillips - 18 graduate credits in Marketing Jody Rebek - Tested Experience Ralf Wilhelms - 18 graduate credits in Marketing
Marketing	MRKT389 - Entrepreneurship	see below	One of the following: - Master's degree in marketing - Master's degree in a business-related field and 18 graduate credit hours in marketing	Robert Boston - Tested Experience Valerie Phillips - 18 graduate credits in Marketing Jody Rebek - Tested Experience Ralf Wilhelms - 18 graduate credits in Marketing
Marketing	MRKT483 - Sales Force Management	see below	One of the following: - Master's degree in marketing - Master's degree in a business-related field and 18 graduate credit hours in marketing	Robert Boston - Tested Experience Valerie Phillips - 18 graduate credits in Marketing Ralf Wilhelms - 18 graduate credits in Marketing

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HLC Assumed Practice B.2. Faculty Roles and Qualifications a. Qualified faculty members are identified primarily by credentials, but other factors, including but not limited to equivalent experience, may be considered by the institution in determining whether a faculty member is qualified. Instructors (excluding for this requirement teaching assistants enrolled in a graduate program and supervised by faculty) possess an academic degree relevant to what they are teaching and at least one level above the level at which they teach, except in programs for terminal degrees or when equivalent experience is established. In terminal degree programs, faculty members possess the same level of degree. When faculty members are employed based on equivalent experience, the institution defines a minimum threshold of experience and an evaluation process that is used in the appointment process. Faculty teaching general education courses, or other non-occupational courses, hold a master's degree or higher in the discipline or subfield. If a faculty member holds a master's degree or higher in a discipline or subfield other than that in which he or she is teaching, that faculty member should have completed a minimum of 18 graduate credit hours in the discipline or subfield in which they teach. Effective September 1, 2017
http://download.hlcommission.org/FacultyGuidelines_2016_OPB.pdf



Using Credentials as a Basis for Determining Minimally Qualified Faculty

Faculty credentials refer to the degrees that faculty have earned that establish their credibility as content experts and thus their competence to teach that content in the classroom. Common expectations for faculty credentials in higher education include the following:

- Faculty teaching in higher education institutions should have completed a program of study (in the discipline or subfield* (as applicable) in which they teach, and/or for which they develop curricula, with coursework at least one level above that of the courses being taught or developed. Completion of a degree in a specific field enhances an instructor's depth of subject matter knowledge and is easily identifiable.
- With the exception noted in the bullet immediately following, faculty teaching in undergraduate programs should hold a degree at least one level above that of the program in which they are teaching. If a faculty member holds a master's degree or higher in a discipline other than that in which he or she is teaching, that faculty member should have completed a minimum of 18 graduate credit hours in the discipline in which he or she is teaching.

If an individual faculty member has not achieved 18 graduate credit hours in the discipline in which he or she teaches, the institution should be able to explain and justify its decision to assign the individual to the courses taught. These decisions should be supported by policy and procedure that are acceptable to the professional judgment of HLC peer reviewers. See the following subsection for more information about how experience may be considered in determining faculty qualifications.

* Assumed Practice B.2. refers to academic subfields. An academic subfield refers to a component of the discipline in which the instruction is delivered. The focus, in the context of HLC accreditation, is on the courses being taught and the general appropriateness of faculty qualifications with reference to such courses. The key consideration is whether a degree in the field or a focus in the specialization held by a faculty member appropriately matches the courses the faculty member would teach in accordance with the conventions of the academic field.

Using Tested Experience as a Basis for Determining Minimally Qualified Faculty

Tested experience may substitute for an earned credential or portions thereof. Assumed Practice B.2. allows an institution to determine that a faculty member is qualified based on experience that the institution determines is equivalent to the degree it would otherwise require for a faculty position. This experience should be tested experience in that it includes a breadth and depth of experience outside of the classroom in real-world situations relevant to the discipline in which the faculty member would be teaching. (Note: Tested experience, as is explained in the following section on dual credit, is typically not based exclusively on years of teaching experience, although other experiential factors as noted below may be considered on a case-by-case basis.)

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Teaching Qualifications Forms
This documentation is relevant to Question number:	Part 1 Question #11
Briefly summarize the content of the file and its value as evidence supporting program review:	The document lists the academic and professional qualifications of each LSB faculty member.

Appendix E: Teaching Qualifications Form (revised January 2018)



TEACHING QUALIFICATIONS FORM
(download & complete the form electronically)

Faculty Member:	Susan Beckon		
School (Primary):	Business	Date:	March 1, 2018

The *Agreement* between Lake Superior State University and the Faculty Association provides for establishment of a list of LSSU courses which a faculty member is qualified to teach consistent with the Higher Learning Commission policies and guidelines related to faculty qualifications. Complete the form electronically (not handwritten), attach your complete current curriculum vitae, and submit all documentation to your immediate supervisor for review. Upon approval, the form will be distributed as follows: Signed original – Human Resources Office (Personnel File); signed copies – Provost, Dean, Faculty Member.

LSSU COURSES THE FACULTY MEMBER IS QUALIFIED TO TEACH (Primary Appointment)				
School of Faculty Member's Primary Appointment				
Course Code/ Number	Complete Course Title	Semester course last taught (e.g. 13F, 14S, etc.)	Semester credits of graduate coursework in this area (18 minimum)	Tested experience as basis for qualifications for this course (attach rationale and documentation)
ACTG 333	Cost Management II	17S	18	
ACTG 334	Accounting Information Systems	18S	18	
ACTG 422	Federal Taxation Accounting II	18S	18	
ACTG 427	Auditing	17F	18	
ACTG 432	Advanced Accounting – Consolidations	16F	18	
ACTG 433	Advanced Accounting – Governmental	17S	18	
ACTG 232	Intermediate Accounting I	17F (Bay College)	18	
ACTG 233	Intermediate Accounting II	18S (Bay College)	18	
BUSN 403	Business, Government and Society	18S		See attached
FINC 341	Managerial Finance	17F		See attached
Faculty's Signature	Susan E. Beckon		Date	3/1/18
Dean's Signature	[Signature]		Date	6/10/18
Provost's Signature	[Signature]		Date	

Tested experience as basis for qualifications:

- BUSN 403:** MBA (12 management credits, in addition 6 credits of management type courses – ML 865 Emerging Topics in Business, GBL 890 Independent Study – Small Business Management – Entrepreneur), 10 years work experience, active in community service, including board positions (Kiwans 25+ years, past treasurer, Holy Name Catholic School 8 years finance committee, 2 years school board, past treasurer – Friends of the Escanaba Public Library, Eiks Auxiliary), 8 years teaching the course
- FINC 341:** MBA (with 18 credits in accounting, 6 credits in finance), CPA certificate, 10 years work experience, 20+ years teaching the course, treasurer of various community service organizations

Appendix E: Teaching Qualifications Form (revised January 2018)



LAKE SUPERIOR STATE UNIVERSITY

TEACHING QUALIFICATIONS FORM (download & complete the form electronically)

Faculty Member:	Robert Boston		
School (Primary):	Lakenda School of Business	Date	03/23/2018

The *Agreement* between Lake Superior State University and the Faculty Association provides for establishment of a list of LSSU courses which a faculty member is qualified to teach consistent with the Higher Learning Commission policies and guidelines related to faculty qualifications. Complete the form electronically (not handwritten), attach your complete current curriculum vitae, and submit all documentation to your immediate supervisor for review. Upon approval, the form will be distributed as follows: Signed original – Human Resources Office (Personnel File); signed copies – Provost, Dean, Faculty Member.

LSSU COURSES THE FACULTY MEMBER IS QUALIFIED TO TEACH (PRIMARY APPOINTMENT):

School of Faculty Member's Primary Appointment				
Course Code/ Number	Complete Course Title	Semester course last taught (e.g. 13F, 14S, etc.)	Semester credits of graduate coursework in this area (18 minimum)	Tested experience as basis for qualifications for this course (attach rationale and documentation)
ACTG132	Principles of Accounting I	NA		
ACTG133	Principles of Accounting II	NA		
ECON201	Principles of Macroeconomics	S18	13 Sub field Finance 18 credit hours	
ECON202	Principles of Microeconomics	S18	13 Sub field Finance 18 credit hours	
ECON302	Managerial Economics	S18	13 Sub field Finance 18 credit hours	
ECON304	Money, Banking & Monetary Policy	F16	13 Sub field Finance 18 credit hours	
ECON305	Public Finance	NA	13 Sub field Finance 18 credit hours	
ECON307	Environmental Economics	NA	13 Sub field Finance 18 credit hours	
ECON308	Intermediate Microeconomics	S17	13 Sub field Finance 18 credit hours	
ECON309	Intermediate Macroeconomics	F17	13 Sub field Finance 18 credit hours	

ECON408	International Economics	NA	13 Sub field Finance 18 credit hours	
FINC242	Personal Finance	F17	18	
FINC245	Principles of Finance	S18	18	
FINC248	Real Estate	NA	18	
FINC341	Managerial Finance	NA	18	
FINC443	Insurance	NA	18	
FINC446	Financial Analysis & Policy	NA	18	
FINC448	Investment Strategy	NA	18	
MGMT280	Intro to Management Info Systems	NA		35 Year Experience in a unionized environment
MGMT360	Management Concepts & Applications	NA		35 Year Experience in a unionized environment
Faculty's Signature			Date	
Dean's Signature	<i>Pat R. Day</i>		Date	6/14/18
Provost's Signature			Date	

Course Code/Number	Semester course last taught	Semester of credits of graduate coursework in this area (18 minimum)
ACT6132 - Principles of Accounting I ACT6133 - Principles of Accounting II		Marta Diaz - Master of Accountancy
ACT6232 - Intermediate Accounting I ACT6233 - Intermediate Accounting II ACT6332 - Cost Management I ACT6333 - Cost Management II ACT6334 - Accounting Information Systems ACT6350 - Income Tax Practicum ACT6421 - Federal Taxation I ACT6422 - Federal Taxation II ACT6427 - Auditing ACT6432 - Advanced Accounting ACT6433 - Advanced Accounting II		Marta Diaz - Master of Accountancy
BUSN121 - Introduction to Business BUSN211 - Business Statistics BUSN231 - Business Communications BUSN308 - Managing Cultural Differences BUSN403 - Business, Government & Society BUSN405 - Business Ethics & Social Responsibility BUSN466 - Business Policy	BUSN211 - Business Statistics - 518	Marta Diaz - Master of Business Administration
ECON201 - Principles of Macroeconomics ECON202 - Principles of Microeconomics		Marta Diaz - Master of Science in Finance
ECON302 - Managerial Economics ECON304 - Money, Banking & Monetary Policy ECON305 - Public Finance ECON307 - Environmental Economics ECON308 - Intermediate Microeconomics ECON309 - Intermediate Macroeconomics ECON407 - Introductory Econometrics		Marta Diaz - Master of Science in Finance
ECON408 - International Economics		Marta Diaz - Master of Science in Finance
FINC242 - Personal Finance FINC245 - Principles of Finance		Marta Diaz - Master of Science in Finance
FINC248 - Real Estate FINC341 - Managerial Finance FINC443 - Insurance FINC446 - Financial Analysis & Policy FINC448 - Investment Strategy		Marta Diaz - Master of Science in Finance
MGMT280 - Intro to Management Info Systems	MGMT280 - Intro to Management Info Systems - 518	Marta Diaz - Master of Business Administration
MGMT360 - Management Concepts & Applications		Marta Diaz - 18 graduate credits in Management
MGMT371 - Operations & Business Analytics	MGMT371 - Operations & Business Analytics - 518	Marta Diaz - 18 graduate credits in Management
MGMT380 - Principles of Leadership		Marta Diaz - 18 graduate credits in Management
MGMT464 - Organizational Behavior		Marta Diaz - 18 graduate credits in Management
MGMT476 - Employee Training & Development		
MRKT281 - Marketing Principles & Strategy		Marta Diaz - Master of Business Administration

Appendix E: Teaching Qualifications Form (revised January 2018)



TEACHING QUALIFICATIONS FORM
(download & complete the form electronically)

Faculty Member:	Mindy McCready
School (Primary):	Lakenda School of Business
Date:	March 16, 2018

The *Agreement* between Lake Superior State University and the Faculty Association provides for establishment of a list of LSSU courses which a faculty member is qualified to teach consistent with the Higher Learning Commission policies and guidelines related to faculty qualifications. Complete the form electronically (not handwritten), attach your complete current curriculum vitae, and submit all documentation to your immediate supervisor for review. Upon approval, the form will be distributed as follows: Signed original – Human Resources Office (Personnel File); signed copies – Provost, Dean, Faculty Member.

LSSU COURSES THE FACULTY MEMBER IS QUALIFIED TO TEACH (PRIMARY APPOINTMENT):

School of Faculty Member's Primary Appointment: Lakenda School of Business				
Course Code/Number	Complete Course Title	Semester course last taught (e.g. 13F, 14S, etc.)	Semester credits of graduate coursework in this area (18 minimum)	Tested experience as basis for qualifications for this course (attach rationale and documentation)
ACTG132	Principles of Accounting I	17F	Master of Business Administration	
ACTG133	Principles of Accounting II	18S	Master of Business Administration	
ACTG232	Intermediate Accounting I	15F		See attached memo.
ACTG233	Intermediate Accounting II	18S		See attached memo.
ACTG332	Cost Management I	07F		See attached memo.
ACTG333	Cost Management II	15S		See attached memo.
ACTG334	Accounting Information Systems	15S		See attached memo.
ACTG350	Income Tax Practicum	18S		See attached memo.
ACTG421	Federal Taxation Accounting I	17F		See attached memo.
ACTG422	Federal Taxation Accounting II	18S		See attached memo.
ACTG427	Auditing	17F		See attached memo.
ACTG432	Advanced Accounting: Consolidations	N/A		See attached memo.
ACTG433	Advanced Accounting: Governmental	N/A		See attached memo.
BUSN121	Introduction to Business	N/A	Master of Business Administration	
BUSN211	Business Statistics	N/A	Master of Business Administration	
BUSN231	Business Communications	N/A	Master of Business Administration	
BUSN308	Managing Cultural Differences	N/A	Master of Business Administration	
BUSN403	Business, Government and Society	N/A	Master of Business Administration	
BUSN405	Business Ethics & Social Responsibility	N/A	Master of Business Administration	
BUSN466	Business Policy	N/A	Master of Business Administration	
ECON201	Principles of Macroeconomics	N/A	Master of Business Administration	
ECON202	Principles of Microeconomics	N/A	Master of Business Administration	
FINC242	Personal Finance	N/A	Master of Business Administration	
FINC245	Principles of Finance	N/A	Master of Business Administration	
MGMT280	Intro to Management Info Systems	N/A	Master of Business Administration	
MGMT360	Management Concepts & Applications	N/A	Master of Business Administration	
MRKT281	Marketing Principles and Strategy	N/A	Master of Business Administration	
Faculty's Signature	Mindy McCready	Date	3/16/18	
Dean's Signature	Dean R. [Signature]	Date	6/10/18	
Provost's Signature				

Appendix E: Teaching Qualifications Form (revised January 2018)



TEACHING QUALIFICATIONS FORM
(download & complete the form electronically)

Faculty Member:	Ralf Wilhelms	Date:	2-22-2018
School (Primary):	Lukenda School of Business		

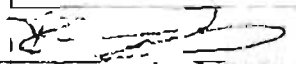
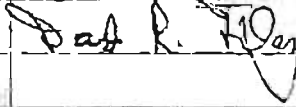
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LSSU COURSES THE FACULTY MEMBER IS QUALIFIED TO TEACH (PRIMARY APPOINTMENT):

School of Faculty Member's Primary Appointment:

Course Code/ Number	Complete Course Title	Semester course last taught (e.g. 13F, 14S, etc.)	Semester credits of graduate coursework in this area (18 minimum)	Tested experience as basis for qualifications for this course (attach rationale and documentation)
INTB 389	Competing in the Global Market Place	17SU	18 + graduate and doctoral credits in International Business	
INTB 420	International Comparative Management	18S	18 + graduate and doctoral credits in International Business	
INTB 375	International Business Law	17S	18 + graduate and doctoral credits in International Business	
INTB486	International Marketing	16SU	18 + graduate and doctoral credits in International Business	
MGMT 280	Intro to Management Info Systems		18 + graduate and doctoral credits in Management	
MGTM 360	Management Concepts & Application		18 + graduate and doctoral credits in Management	
MGMT 371	Operations & Business Analytics		18 + graduate and doctoral credits in Management	
MGMT 380	Principles of Leadership		18 + graduate and doctoral credits in Management	
MGMT464	Organizational Behavior		18 + graduate and doctoral credits in Management	
MGMT 475	Employee Training & Development		18 + graduate and doctoral credits in Management	
MGMT 365	Human Resource Management		18 + graduate and doctoral credits in	

			Human Resource and Management
MGMT 469	Collective Bargaining		18 + graduate and doctoral credits in Human Resource and Management
MRKT 281	Marketing Principles & Strategy		18 + graduate and doctoral credits in Marketing
MRKT 283	Principles of Selling		18 + graduate and doctoral credits in Marketing
MRKT379	Sports and Event Marketing		18 + graduate and doctoral credits in Marketing
MRKT 381	Consumer Behavior		18 + graduate and doctoral credits in Marketing
MRKT 383	E-Marketing	17SU	18 + graduate and doctoral credits in Marketing
MRKT 387	Advertising Theory & Practice		18 + graduate and doctoral credits in Marketing
MRKT 388	Retail Management		18 + graduate and doctoral credits in Marketing
MRKT 480	Marketing Research	17F	18 + graduate and doctoral credits in Marketing
MRKT 481	Marketing Management	18S	18 + graduate and doctoral credits in Marketing
MRKT 385	Service Marketing		18 + graduate and doctoral credits in Marketing
MRKT 389	Entrepreneurship		18 + graduate and doctoral credits in Marketing
MRKT483	Sales Force Management		18 + graduate and doctoral credits in Marketing
BUSN121	Introduction to Business	18S	18 + graduate and doctoral credits in Business
BUSN 211	Business Statistics		18 + graduate and doctoral credits in Business
BUSN 231	Business Communications		18 + graduate and doctoral credits in Business
BUSN 308	Managing Cultural Differences	17F	18 + graduate and doctoral credits in Business
BUSN 403	Business, Government & Society		18 + graduate and doctoral credits in Business
BUSN 405	Business Ethics & Social Responsibility		18 + graduate and doctoral credits in Business

BUSN 466	Business Policy	18S	18 + graduate and doctoral credits in Strategy and Business
ECOM201	Principles of Macroeconomics		18 + graduate and doctoral credits in Business
BUSN 491	Research Read/Bus & Econ	17S	18 + graduate and doctoral credits in Business
ECON 202	Principles of Microeconomics		18 + graduate and doctoral credits in Business
ECON 408	International Economics	17F	18 + graduate and doctoral credits in International Business
ACTG 132	Principles of Accounting I		18 + graduate and doctoral credits in Business
ACTG 133	Principles of Accounting II		18 + graduate and doctoral credits in Business
INTD 320	Foreign Study		18 + graduate and doctoral credits in International Business
BUSN 399	Internship		18 + graduate and doctoral credits in Business
FINC 242	Personal Finance		18 + graduate and doctoral credits in Business
FINC 245	Principles of Finance		18 + graduate and doctoral credits in Business
Faculty's Signature		Date	2-22-2018
Dean's Signature		Date	6/10/18
Provost's Signature		Date	

Appendix E: Teaching Qualifications Form (revised January 2018)



LAKE SUPERIOR STATE UNIVERSITY

TEACHING QUALIFICATIONS FORM

(download & complete the form electronically)

Faculty Member:	Valerie Philips		
School (Primary)	Business	Date:	March 25, 2018

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LSSU COURSES THIS FACULTY MEMBER IS QUALIFIED TO TEACH (PRIMARY APPOINTMENT):

School of Faculty Member's Primary Appointment				
Course Code/Number	Complete Course Title	Semester course last taught (e.g. 13F, 14S, etc.)	Semester credits of graduate coursework in this area (18 minimum)	Tested experience as basis for qualifications for this course (attach rationale and documentation)
MRKT 281	Marketing Principles and Strategy	18S	18+ credits; MBA with Marketing major	More than 20 years teaching this course at 3 different institutions (LSSU, Algoma University, Sault College);
MRKT 283	Personal Selling	17F	"	Sales positions for Dominion Textile and McNeil Consumer Products/Johnson & Johnson Baby Products Company; retail selling experience
MRKT 381	Consumer Behavior	17F	"	Planned and introduced the course into the Marketing curriculum 1999
MRKT 385	Services Marketing	18S	"	
MRKT 387	Advertising Management	17S	"	
MRKT 379	Sports and Events Marketing	17S	"	Introduced course; record of supervising students in MRKT 379's event planning, raising more than \$20,000 cumulatively for charity; annual status of events including RibFest, Swishes for Wishes, etc.; ongoing internship supervision for various events
MRKT 388	Retail Management	18S	"	Retail store creator and owner (Heels), Station Mall, Sault Ste. Marie, Ontario
MRKT 389	Entrepreneurship	09S	"	Instructor of business planning at Sault College in

				native entrepreneurial program; author of my own business plan for retail business, Heels; ownership and management of entrepreneurial business; Treasurer, SMART; entrepreneurial training through Government of Michigan grant
INTB 486	International Marketing	18S	"	
BUSN 121	Introduction to Business	16F	"	Undergraduate and postgraduate degrees in Business
BUSN 231	Business Communications	89F	"	20+ years of experience in interpersonal communications as professor, chair, salesperson, committee member, Product Director, conference presenter, undergraduate and postgraduate degrees in Business
BUSN 308	Managing Cultural Diversity		"	Minority member (female; Canadian); involvement with LGBTQ groups 2007-2011; teaching exclusively Native Canadian students at Sault College; experience working with a global corporation (McNeil/Johnson & Johnson)
ACTG 132, 133	Principles of Accounting I Principles of Accounting II			Undergraduate and postgraduate degrees in Business; performed bookkeeping duties for my own small business; taught Financial Accounting at Sault College and Toronto School of Business
ECON 201, 202	Macroeconomics Microeconomics			Teaching experience at Sault College and Toronto School of Business; undergraduate and postgraduate studies in Business
MRKT 480	Marketing Research		18+ credits; MBA Marketing major	Planned, implemented, and analyzed my own marketing research for my retail business; supervised students in conducting research for various local stakeholders (DDA, Sault Theater); assisted in developing primary research, and interpreting research findings, as well as utilization of syndicated secondary research, for product management decision-making in industry
COMM 101	Fundamentals of Speech and Communication		"	20 years of experience in interpersonal

D.R.F.

				communications as professor, salesperson, Product Director, conference presenter
MRKT 481	Marketing Management	OOS	"	Critical thinking and strategic management skills as Product Director and entrepreneur
MRKT 483	Sales Force Management	OOS	"	Sales experience, as documented
MRKT 383	E-Marketing		"	
MGMT 360	Principles of Management		"	Hiring and management of employees in industry: inside sales people (Dominion Textile), product assistants (McNeil), full-time and part-time staff (Heels); chair responsibility for 5 years
COMM 101	Fundamentals of Speech and Communication <i>DRH</i>		"	20 years of experience in interpersonal communications as professor, Chair, salesperson, committee member, Product Director, conference presenter
Faculty's Signature			Date	
Dean's Signature	<i>Paul R. Wiley</i>		Date 6/10/18	
Provost's Signature			Date	



LAKE SUPERIOR STATE UNIVERSITY

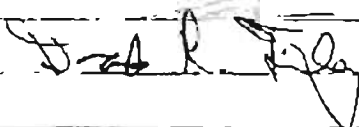
TEACHING QUALIFICATIONS FORM (download & complete the form electronically)

Faculty Member	Jod Rebek	
School (Primary)	Lukeenda	Date March 2, 2018

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LSSU COURSES THE FACULTY MEMBER IS QUALIFIED TO TEACH (PRIMARY APPOINTMENT):

School of Faculty Member's Primary Appointment:				
Course Code/Number	Complete Course Title	Semester course last taught (e.g. 13F, 14S, etc.)	Semester credits of graduate coursework in this area (18 minimum)	Tested experience as basis for qualifications for this course (attach rationale and documentation)
ACTG132 & ACTG133	Principles of Accounting 1 & 11	n/a		See attached, "Tested Experience"
BUSN121	Introduction to Business	n/a		Tested Experience
BUSN211	Business Statistics	n/a		Tested Experience
ECON201 & ECON202	Principles of Macroeconomics & Microeconomics	n/a		Tested Experience
MRKT389	Entrepreneurship	n/a		Tested Experience
MRK284	Services Marketing	n/a		Tested Experience
BUSN466	Business Policy	n/a		Tested Experience
BUSN231	Business Communications	Spring 2018	18 credits + graduate and doctoral credits in leadership	Tested Experience
BUSN403	Business, Government & Society	n/a		Tested Experience
BUSN405	Business Ethics & Social Responsibility	n/a		Tested Experience
BUSN308	Managing Cultural Differences	n/a		Tested Experience
MGMT464	Organization Behavior	Fall 2017	18 credits + graduate and doctoral credits in leadership	
MGMT491	Research Principles	Spring 2017	18 credits + graduate and doctoral credits in leadership	
MGMT471	Employment Training and Development	Fall 2017	18 credits + graduate and doctoral credits in leadership	
MGMT360	Management Principles	Spring 2018	18 credits + graduate and doctoral credits in management	

MGMT371	Operations & Business Analytics		18 credits + graduate and doctoral credits in management	
MGMT365	Human Resource Management		18 credits + graduate and doctoral credits in human resources	
MGMT469	Labor Relations and Collective Bargaining	Spring 2018	18 credits + graduate and doctoral credits in human resources	
MGMT380	Leadership Principles	Spring 2018	18 credits + graduate and doctoral credits in leadership	
MGMT280	Intro to Management Information Systems	n/a		Tested Experience
Faculty's Signature			Date	March 2, 2018
Dean's Signature			Date	6/10/18
Provost's Signature			Date	

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LAKE SUPERIOR STATE UNIVERSITY

TEACHING QUALIFICATIONS FORM (download & complete the form electronically)

Faculty Member	Gerald Root	Date
School (Primary)		

The *Agreement* between Lake Superior State University and the Faculty Association provides for establishment of a list of LSSU courses which a faculty member is qualified to teach consistent with the Higher Learning Commission policies and guidelines related to faculty qualifications. Complete the form electronically (not handwritten), attach your complete current curriculum vitae, and submit all documentation to your immediate supervisor for review. Upon approval, the form will be distributed as follows: Signed original – Human Resources Office (Personnel File); signed copies – Provost, Dean, Faculty Member.

LSSU COURSES THE FACULTY MEMBER IS QUALIFIED TO TEACH (PRIMARY APPOINTMENT)

School of Faculty Member's Primary Appointment

Course Code/ Number	Complete Course Title	Semester or course last taught (e.g. 13F, 14S, etc.)	Semester credits of graduate coursework in this area (18 minimum)	Tested experience as basis for qualifications for this course (attach rationale and documentation)
ACTG 132	Principles of Accounting 1		MBA—60 hours	Chartered Financial Analyst
ACTG 133	Principles of Accounting 2		MBA—60 hours	Chartered Financial Analyst
BUSN 121	Introduction to Business		MBA—60 hours	Chartered Financial Analyst
BUSN 211	Business Statistics		MBA—60 hours	Chartered Financial Analyst
BUSN 231	Business Communications		MBA—60 hours	Chartered Financial Analyst
BUSN 308	Manag. in Cultural Differences		MBA—60 hours	Chartered Financial Analyst
BUSN 403	Business Government and Society	18S	MBA—60 hours	Chartered Financial Analyst
BUSN 405	Business ethics and Responsibility		MBA—60 hours	Chartered Financial Analyst
BUSN 466	Business Policy		MBA—60 hours	Chartered Financial Analyst
ECON 201	Principles of Macroeconomics	03S	MBA—60 hours	Chartered Financial Analyst
ECON 202	Principles of Microeconomics		MBA—60 hours	Chartered Financial Analyst
ECON 302	Managerial Economics		MBA—60 hours	Chartered Financial Analyst
ECON 304	Money, Banking, and Economic Policy		MBA—60 hours	Chartered Financial Analyst
ECON 305	Public Finance	17S	MBA—60 hours	Chartered Financial Analyst
ECON 307	Environmental Economics	17F	MBA—60 hours	Chartered Financial Analyst
ECON 308	Intermediate Microeconomics		MBA—60 hours	Chartered Financial Analyst
ECON 309	Intermediate Macroeconomics		MBA—60 hours	Chartered Financial Analyst
ECON 407	Introduction to Econometrics		MBA—60 hours	Chartered Financial Analyst
ECON 408	International Economics		MBA—60 hours	Chartered Financial Analyst

Faculty's Signature	<i>Gerald Root</i>	Date	2-26-2018
Dean's Signature	<i>DAK. [Signature]</i>	Date	6/6/18

ADDITIONAL COURSES:
Use additional pages as necessary - separate entries by College

School:				
Course Code/ Number	Complete Course Title	Semester course last taught (e.g. 13F, 14S, etc.)	Semester credits of graduate coursework in this area (18 minimum)	Tested experience as basis for qualifications for this course (attach rationale and documentation)
FINC 242	Personal Finance		MBA—60 hours	Chartered Financial Analyst
FINC 245	Principles of Finance		MBA—60 hours	Chartered Financial Analyst
FINC 248	Real Estate		MBA—60 hours	
FINC 341	Managerial Finance	18S	MBA—60 hours	Chartered Financial Analyst
FINC 443	Insurance	16F	MBA—60 hours	
FINC 446	Financial Analysis and Policy	18S	MBA—60 hours	Chartered Financial Analyst
FINC 448	Investment Strategy	17S	MBA—60 hours	Chartered Financial Analyst
MGMT 280	Introduction to Management Information Systems		MBA—60 hours	
MRKT 281	Marketing Principles and Strategy		MBA—60 hours	
Faculty's Signature				Date
Dean's Signature				Date

School:				
Course Code/ Number	Complete Course Title	Semester course last taught (e.g. 13F, 14S, etc.)	Semester credits of graduate coursework in this area (18 minimum)	Tested experience as basis for qualifications for this course (attach rationale and documentation)
Faculty's Signature				Date
Dean's Signature				Date
Provost's Signature				Date

MEMO Faculty Tested Experience

Name	Robert Boston
Date	November 1, 2017
Topic	Tested Experience
Courses	<p>MGMT360 -Management Concepts and Applications (3,0) 3</p> <p>Principles and techniques applicable to the functions of management: Planning, organizing, directing (staffing and leading) and controlling; development of management thought and decision-making; current issues and future concerns in management. Foundation course for study and understanding of management theory and practice. Prerequisite: Junior standing.</p>
	<p>MGMT380 - Principles of Leadership (3,0) 3</p> <p>This course provides the student with an understanding of the principles and behaviors situationally appropriate to inspire and influence others. Whether people work individually, in small teams, task forces, or other units at all organizational levels; effective leadership sustains profitability, productivity, and excellent service. Studying research findings, leadership practices, and skills helps the student understand how this knowledge can be applied to effectively lead others. Prerequisite: MGMT360.</p>
	<p>MRKT389 – Entrepreneurship (3,0) 3</p> <p>A study of individual small firms: start-up, on-going management, challenges, and requirements for success. Students will apply both strategic planning and the knowledge acquired from other business courses to (a) demonstrate understanding and competence in using S.A.P. in small business decision-making and operations, (b) develop a viable business plan for a new small business, and (c) utilize problem-solving for other local small businesses, where required, in an advisory capacity. Prerequisites: ACTG132 or 230, BUSN121 and MRKT281.</p>
	<p>MRKT483 - Sales Force Management (3,0) 3</p> <p>Principles and policies of sales organization; career opportunities; recruiting, selecting and training sales people; motivation, supervision and evaluation of sales performance; compensation plans, quotes and expense accounts. Prerequisites: MRKT281 and 283.</p>

Course Identifier	Tested Experience Description (what and for how long)
<p>MGMT360 – Management Concepts & Applications</p>	<p>During my thirty year career as a business executive/owner I had numerous responsibilities pertaining to Management Concepts and Applications.</p> <p>I have reorganized business units, written new job descriptions hired/terminated and evaluated hundreds of employees. Written employee manuals, designed compensation plans, directed staff and designed and delivered staff training programs.</p> <p>I also co-developed and delivered leadership/management training to employees of the Ontario Ministry of Natural Resources in Sault Ste. Marie and Thunder Bay Ontario.</p> <p>I developed and delivered productivity/lean training to local hotel franchises, including Holiday Inn, Ramada Inn and Water Tower Inn in Sault Ste. Marie, Ontario.</p> <p>As lead negotiator for a group of six independent businesses, I negotiated labour contracts with a major international union (International Association of Machinist) representing approximately 250 members. Took part in grievance procedures, arbitration hearings and termination law suits.</p> <p>I have a certificate in "Organizational and Career Development" from the University of Windsor and a certificate in "Personnel-Industrial Relations" from the Canadian Council of Personnel Associations.</p>
<p>MGMT380 - Leadership</p>	<p>During my thirty year career as a business executive/owner/consultant/trainer I had numerous responsibilities pertaining to Principles of Leadership.</p> <p>I have lead sales teams, management teams and groups of business owners. I also co-developed and delivered leadership/management training to employees of the Ontario Ministry of Natural Resources in Sault Ste. Marie and Thunder Bay.</p> <p>I developed and delivered productivity/lean training to local hotel franchises, including Holiday Inn, Ramada Inn and Water Tower Inn.</p> <p>I have a certificate in "Organizational and Career Development" from the University of Windsor and a certificate in "Personnel-Industrial Relations" from the Canadian Council of Personnel Associations.</p> <p>I have successfully completed a two day Sales Leadership program from Joe Verde Group.</p>

Course Identifier	Tested Experience Description (what and for how long)
MRKT389 - Entrepreneurship	<p>I have held various positions in a group of family owned companies for over thirty years. These companies employed approximately 65 employees and had substantial annual revenue. I have held the position of Treasurer/Director of Operations, during which time I have developed and implemented three new business plans for various enterprises. These included, but were not limited to the development of market analysis, financial projections, fixed asset purchases and bank financing. I am a certified Wendy Kennedy entrepreneurship coach and have delivered the WKI training to local entrepreneurs.</p>
MRKT483 – Sales Force Management	<p>I was responsible for managing a sales force of approximately ten sales people for thirty years. During this time I was accountable for sales training, sales compensation plans, hiring and terminating salespeople and over site of sales programs.</p> <p>I have successfully completed a two day "Closing and Negotiating" program delivered by the Joe Verde Group. I have completed a two day "Sales Leadership" program delivered by the Joe Verde Group. I was a certified trainer for "Professional Selling Skills III", the Xerox needs based selling system. I delivered this program as a private consultant through Sault College under the "Ontario Management Development" program over a multi-year time span.</p>

MEMO Faculty Tested Experience

Name	Mindy McCready
Date	November 1, 2017
Topic	Tested Experience
Courses	ACTG232 – Intermediate Accounting I ACTG233 – Intermediate Accounting II ACTG332 – Cost Management I ACTG333 – Cost Management II ACTG334 – Accounting Information Systems ACTG350 – Income Tax Practicum ACTG421 – Federal Taxation Accounting I ACTG422 – Federal Taxation Accounting II ACTG427 – Auditing ACTG432 – Advanced Accounting: Consolidations ACTG433 – Advanced Accounting: Governmental

Course Identifier	Tested Experience Description (what and for how long)
ACTG232 ACTG233 ACTG334 ACTG350 ACTG421 ACTG422 ACTG432	<p>I became a Certified Public Accountant in 2002. Prior to becoming a full-time faculty member, I worked in public accounting for seven years.</p> <p>As a tax senior accountant, I received the following related experience:</p> <ul style="list-style-type: none"> • Prepared individual, business and fiduciary federal and state income tax returns and payroll tax returns • Worked directly with clients ranging from high-wealth individuals to multinational corporations on multi-jurisdictional compliance and tax planning issues • Performed tax research and drafted responses to correspondence issued by taxing authorities • Reviewed work completed by staff associates and participated in their training and mentoring

Course Identifier	Tested Experience Description (what and for how long)
ACTG232 ACTG233 ACTG332 ACTG333 ACTG334 ACTG427 ACTG433	As an audit senior accountant, I received the following related experience: <ul data-bbox="602 390 1354 646" style="list-style-type: none">• Participated in external audits of governmental, non-profit, and small business entities, and employee benefit plans• Planned the extent and type of audit testing required and selected transactions to be tested• Performed testing procedures and made determinations based on the results• Proficiently operated accounting software programs in a paperless audit environment

MEMO Faculty Tested Experience

Name	Jody Rebek
Date:	September 29, 2017
Topic	Tested Experience
Courses	ACTG132 & ACTG133, BUSN121, BUSN211, ECON201 & ECON202, MRKT389, MRKT385, BUSN231, BUSN308, BUSN403, BUSN405, BUSN466, MGMT280

Course Identifier	Tested Experience Description (what and for how long)
ACTG132 & ACTG133 Principles of Accounting I & II	Completed accounting processes for own business for 10 years
BUSN121 Intro to Business	Management and Executive Management in several organizations for 15+ years, Owner and Operator of own business for 10 years
BUSN211 Business Statistics	Statistician and Quality Assurance Manager for 3+ years - created mathematical model for valuation of residential properties in the Algoma District, using Multiple Regression Analysis and SPSS
ECON201 & ECON202 Principles of Macroeconomics & Microeconomics	Worked In Economic Development for 5+ years
MRKT389 Entrepreneurship	Ran several nonprofit organizations, corporations and own several of my own business for 20 + years (First Business Launched at Age 20, JR Ink, Communita, Cloud 9 Creamery, Vive Consulting)
MRKT385 Services Marketing	Handled marketing of nonprofit organizations, internal marketing to employees to approximately 2000 employees, and community marketing initiatives for 12+ years
BUSN231 Business Communications	Operations Coordinator for company of 2,000 employees - led change initiatives for 3+ years. Executive Director and Community Leader for 12+ years; Government Liaison and Recording Secretary (2+ yrs); Published Writer, Blogger and Keynote Speaker.

<p>BUSN308 Managing Cultural Differences</p>	<p>7+ years working with International Students at Algoma University (Asia, Africa, Europe, South America); World Traveller (Asia, Europe, North America); 12 + Years working in Community Development; 25+ Years in Conflict Management</p>
<p>BUSN403 Business, Government and Society</p>	<p>Led community initiatives for 12+ years. Facilitated large community forums of business leaders, youth, women, and socially disadvantaged. Worked as government employee for more than 10 years (e.g., Manager, government student centre; Operations Coordinator, MPAC). Managed government grants \$500,000+, and business owner (20 years). Helped to establish several community initiatives (too many to mention, including the Community Adjustments Committee, Bioscience convergence centre). Participated on several community (e.g., Best for Kids, Chamber of Commerce, Rotary, etc.) and elected representative on government committees (Northern Ontario Development and Mines, Sault Ste. Marie Economic Development Committee, etc.).</p>
<p>BUSN405 Business Ethics & Social Responsibility</p>	<p>Ran several nonprofit organizations (12+ years), supported development of new nonprofits and social (e.g., Major's Youth Council, Community Resilience, Community). Strong self-development, philanthropic and social justice background (see BUSN403).</p>
<p>BUSN466 Business Policy</p>	<p>University of Toronto, Strategic Planning Course; Levington Institute ONStrategy Executive Training; Led development and implementation of strategic plans for communities, local government offices, regional centres, organizations, businesses, nonprofit groups, municipalities, labour boards, government departments, etc. for 20+ years. Led development of strategic plan and new corporate strategy at MPAC (5+ years)</p>
<p>MGMT280 Intro to Management Information Systems</p>	<p>Computer Science Certification. Developed and implemented an Intranet website and software. The software development focused on gathering project management and HR information for 2000 employees at MPAC to use daily. The Intranet had an HR focus.</p>

PART 2: Degree-Level Review

Degree Program: Bachelor of Science - Accounting

Explain how the program works to address each of the following questions. For each question, respond with a narrative and supporting evidence.

Assessment (CC 4.B and CC 4.C)

13. Provide evidence that the degree-level program outcomes are clearly stated and are effectively assessed, including the “use of results.” Attach the 4-Column Program Assessment Report.

A report is attached that details the assessment criteria, assessment results and use of results for the Accounting program’s student learning outcomes for the 2016/2017 and 2017/2018 academic years.

14. Explain how results from degree assessments were used to improve the degree program. Include specific examples.

Examples of how the Lukenda School of Business (LSB) faculty members have used data collected from key assessment procedures to make improvements to the Accounting program in recent years are provided below.

Major Field Test in Business (MFT)

The LSB administers the MFT every semester to senior students enrolled in the bachelor degree capstone course, Business Policy (BUSN466). Students are tested in nine business areas, and their scores are compared with those of thousands of students across the nation. In recent periods, LSB students have scored below the national mean in the Quantitative Business Analysis and Information Systems areas. Significant improvement has been made in these sections since a management professor with a strong quantitative background was hired and courses in information systems and analytics were added to the common professional component of all business bachelor degrees. Accounting students scored in the 99th percentile in the Quantitative area and in the 96th percentile in the Information Systems area during the 2016/2017 academic year. The average score of accounting majors dropped below the national mean again during 2017/2018. The LSB faculty member who teaches MGMT280 (Intro to Management Information Systems) and MGMT371 (Operations & Business Analytics) continues to adjust teaching methods and assignments to deepen students' understanding of difficult concepts covered in these courses. Beginning fall 2018, the professor implemented quizzes to encourage students to read the textbook, assigned graded homework, required an online subscription to study material and added more sophisticated Excel exercises. She also began the semester by giving a presentation on how to succeed in quantitative courses. Accounting students have also struggled with the International Issues section. As a result, faculty members have implemented international content into upper-level accounting courses. The average score of accounting majors in the International Issues was in the 96th percentile during 2016/2017 and the 98th percentile during 2017/2018. Scores in the international section of the MFT will continued to be monitored to ensure accounting majors are receiving enough exposure to international business issues without being required to take an international business course.

Senior Project

All LSB students pursuing a bachelor's degree are required to complete a business plan as the final project in the capstone course, Business Policy (BUSN466). In recent periods, accounting majors were not scoring as high as faculty members anticipated in the financial section of this senior project. Qualitative feedback received from students indicated they were uncomfortable creating financial statements from scratch. Improvement has been made in this area since accounting faculty began incorporating assignments into course curriculum that require accounting students to build financial statements based on their own estimates. All accounting students met the targeted score of 85% or higher in the financial section during the spring 2018 semester.

Senior Survey

The LSB administers the senior survey to graduating students each semester enrolled in the capstone course Business Policy (BUSN466). Faculty members added additional group assignments to upper-level accounting courses after accounting majors indicated on the survey that their ability to work cooperatively with others did not change. The LSB met its goal in 2018 when 84% of accounting students indicated their ability in this area was stronger or much stronger compared to their ability as freshmen. In addition, qualitative feedback received from accounting majors indicates student learning is negatively impacted when adjunct instructors teach upper-level accounting courses. LSB faculty and staff have considered this when assigning courses to faculty and developing course schedules. For the fall 2018 semester, all upper-level accounting courses are being taught by full-time faculty members.

Quality, Resources and Support (CC 3.A)

15. Explain how the program ensures that degree program-level and course-level learning outcomes are at an appropriate level. Attach evidence, including a degree audit for the program.

Upon graduation, LSB accounting students primarily aim to pursue graduate study, pass the Certified Public Accountant (CPA) Exam, or obtain an entry-level accounting job in the public, private, government or non-profit sectors. LSB faculty have designed the program's curriculum and objectives accordingly. Students are exposed to all the functional areas of business through completion of the Common Professional Core component (48 credits) of the program and develop an understanding of the interdisciplinary nature of business by taking courses in communications, statistics, law, policy, economics, finance, management and marketing. The major requirements component (41 credits) includes rigorous courses in financial accounting, managerial accounting, governmental accounting, accounting information systems, individual taxation and business taxation, including 29 credit hours at the 300-level and 400-level. A degree audit for the program is attached. A document is also attached that details how the program's graduates are eligible to take the CPA Examination.

LSSU's Bachelor of Science in Accounting Degree is accredited by the Accreditation Council for Business Schools and Programs (ACBSP). Numerous sections of ACBSP's Standard #6 (Education Design and Delivery) relate to components that are required to be included in an undergraduate business curriculum. Sections of the Self Study, submitted by the LSB for initial accreditation in 2014, that indicate how the program meets these requirements are attached.

Intellectual Inquiry (CC 3.B).

16. Explain what the program does to engage students in collecting, analyzing, and communicating information; mastering modes of inquiry or creative work; developing skills integral to the degree program. Attach examples of undergraduate research, projects, and creative work.

LSSU accounting professors bring their public and private accounting experience into the classroom and focus on practical application through problem-based learning, case analysis and simulations. Examples of innovative methods used to engage accounting students and challenge them to reach their full potential include the following:

- Students in ACTG350 (Income Tax Practicum) prepare income tax returns electronically for community members through the IRS-sponsored Volunteer Income Tax Assistance program.
- Faculty members work with students and employers to provide internship opportunities, many of which lead to full-time employment upon graduation. During the reporting period, accounting students completed paid internships with the following organizations:
 - Anderson, Tackman & Company PLC
 - Central Savings Bank
 - Eastern Upper Peninsula Intermediate School District
 - Hantz Tax and Business, LLC
 - Old Mission Bank
 - Precision Edge Surgical Products, LLC
- Accounting students have the opportunity to participate in various LSSU student organizations that allow them to further explore the business world including the Accounting Club, the Investment Club and Enactus.
- Through participation in the Accounting Club, students have the opportunity to attend the Institute of Management Accountants' Student Leadership Conference. To raise money to travel to the conference, Accounting Club members plan and host the Superior Accounting Conference biennially which allows accounting professionals to earn continuing professional education credit.
- Accounting students have the opportunity to participate in a faculty-led study group to prepare them to take the Certified Management Accountant exam before graduation.
- Faculty members nominate ten accounting students a year to receive a CMA Scholarship that allows them to prepare for and take the Certified Management Accountant exam at no cost.
- Accounting students who plan to become a Michigan Certified Public Accountant (CPA) have the opportunity to earn the required number of credits by completing the program's 150-Hour Concentration which includes a CPA Exam preparation course.

Business Policy (BUSN466) is the capstone course for all business bachelor degree programs at LSSU. During this course, students complete a senior project that requires them to prepare a comprehensive business plan that an organization would use to acquire capital and guide its operations. The project requires students to perform qualitative and quantitative research related to the nature, opportunity and viability of a business venture. It also allows students to apply what they have learned in all previous business courses to develop an understanding of the interrelationship of the divisions, departments and functions of the "whole firm" and its environment. The rubric used to grade the project is attached. During the reporting period, LSSU accounting students used their talents and interests to prepare excellent business plans for hypothetical businesses such as Sault Acupuncture, Red, Wine and Brew, UP North Tennis Center, Paw Ground and Flowers on Beltline.

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Assessment Report
This documentation is relevant to Question number:	Part 2 – Accounting Question #13
Briefly summarize the content of the file and its value as evidence supporting program review:	The report provides evidence that the program's outcomes are clearly stated and effectively assessed.

Assessment: Program Four Column

Program (CoS) - Accounting BS

Program Notes:

Assessment Contact: Prof. Mindy McCready

Mission Statement: Undergraduate teaching and learning for undergraduate accounting students is designed to provide students with sufficient technical and professional knowledge as well as skills to form the foundation for a successful accounting career. The School of Business determines that there are three main knowledge areas to be: (1) professional knowledge; (2) professional skills; (3) and professional values and attitudes

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>Accounting Theory and Practice - Graduates will be able to apply accounting standards to information for financial accounting, managerial/cost accounting, governmental accounting, auditing, tax and accounting information systems purposes. Goal Status: Active Goal Category: Student Learning Start Date: Inactive Date: Goal Level (Bloom/Webb): Institutional Learning: ILD2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem. Revision Notes: Assessment Year:</p>	<p>Direct - Exam/Quiz - Standardized - Students will be given a pre test at the beginning of Intermediate Accounting and the same test at the end of Advanced Accounting. The test includes questions from all the accounting courses in the curriculum. The test results will be analyzed to determine increased knowledge and skills. Criteria Target: Increase in the average score of accounting majors will be 60% or higher in the multiple choice section. Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: Not applicable to this outcome High Impact Program Practices 2: Not applicable to this outcome</p>	<p>Finding Reporting Year: 2016-2017 Goal met: No The pre-test was first administered to ACTG232 students during the fall 2015 semester. The average score of the 21 students who took the test was 41%. The pre-test was not administered during 2016-2017. (08/29/2018) Optional Data Point 2: Optional Data Point:</p>	<p>Use of Result: The students who took the pre-test in fall 2015 will take the post-test in spring 2018. The change in the average score of all students and the change in each student's score will be measured. (08/29/2018) Budget Rationale: Budget Request:</p>
	<p>Direct - Exam/Quiz - Standardized - The Major Field Test (MFT) in Business is administered in the capstone course BUSN 466 -</p>	<p>Finding Reporting Year: 2017-2018 Goal met: No Senior students took the post-test in spring 2018. The average score was 56% which was 37% higher than the average score of the pre-test taken in fall 2015. Six of the students who took the pre-test in fall 2015 took the post-test in spring 2018. The average increase of their individual scores was 44%. (08/29/2018) Optional Data Point 2: Optional Data Point:</p>	<p>Use of Result: Since this is the first time we were able to compare pre-test and post-test results, we will not make any changes at this point. We will continue to administer the tests until we have enough data to draw conclusions from. (08/29/2018) Budget Rationale: Budget Request:</p>
		<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2016 - 99th percentile Spring 2017 - 99th percentile (08/13/2018)</p>	<p>Use of Result: Due to the positive results achieved over the last several years, the LSB has not made any changes to its</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
	<p>Business Policy. Students are tested in several specific business areas including Accounting.</p> <p>Criteria Target: Accounting majors will score in the 80th percentile in the accounting section of the MFT.</p> <p>Schedule/Notes:</p> <p>Budget Implications (\$):</p> <p>High Impact Program Practices 1: Not applicable to this outcome</p> <p>High Impact Program Practices 2: Not applicable to this outcome</p>	<p>Optional Data Point 2:</p> <p>Optional Data Point:</p> <hr/> <p>Finding Reporting Year: 2017-2018</p> <p>Goal met: No</p> <p>Fall 2017 - 26th percentile</p> <p>Spring 2018 - 99th percentile (08/13/2018)</p> <p>Optional Data Point 2:</p> <p>Optional Data Point:</p>	<p>accounting program based solely on this data. The LSB will continue to review scores in this area and watch for negative trends. (08/13/2018)</p> <p>Budget Rationale:</p> <p>Budget Request:</p> <hr/> <p>Use of Result: During fall 2017, only one accounting student took the MFT. This student scored very low in each section. Due to the positive results achieved over the last several years, the LSB has not made any changes to its accounting program based solely on this data. The LSB will continue to review scores in this area and watch for negative trends. Qualitative feedback received from accounting majors indicates student learning is negatively impacted when adjunct instructors teach upper-level accounting courses. LSB faculty and staff will consider this when assigning courses to faculty and developing course schedules.</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>Effective Communication - Graduates will be able to record, report and communicate accounting information relevant to internal and external users.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Start Date:</p> <p>Inactive Date:</p> <p>Goal Level (Bloom/Webb):</p> <p>Institutional Learning: ILO1 - Formal Communication - Students will develop and clearly express complex ideas in written and oral presentations.</p> <p>Revision Notes:</p> <p>Assessment Year:</p>	<p>Direct - Capstone Project - including undergraduate research - Students are required to complete a business plan with complete financials and analysis for the capstone course BUSN 465 - Business Policy.</p> <p>Criteria Target: 80% of Accounting majors will score 85% or higher in the accounting section of the business plan.</p> <p>Schedule/Notes:</p> <p>Budget Implications (\$):</p> <p>High Impact Program Practices 1: Capstone Course(s), Projects</p> <p>High Impact Program Practices 2: Capstone Course(s), Projects</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: No</p> <p>Fall 2016 - 78%</p> <p>Spring 2017 - 75% (08/13/2018)</p> <p>Optional Data Point 2:</p> <p>Optional Data Point:</p> <hr/> <p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>Fall 2017 - 0%</p> <p>Spring 2018 - 100% (08/13/2018)</p> <p>Optional Data Point 2:</p> <p>Optional Data Point:</p>	<p>(08/13/2018)</p> <p>Budget Rationale:</p> <p>Budget Request:</p> <p>Use of Result: Although the goal was not met, only 3 students did not score 85% or higher during the year. Qualitative feedback received from students indicated they were uncomfortable creating financial statements from scratch. They were confident with the structure of statements, but struggled with estimating amounts to include. (08/13/2018)</p> <p>Budget Rationale:</p> <p>Budget Request:</p> <hr/> <p>Use of Result: The goal was met during the spring 2018 semester. Only one accounting major took BUSN466 during the fall 2017 semester. The target was met for the year, as 91% of accounting students scored 85% or higher. Accounting faculty will continue incorporating assignments into course curriculum that require accounting students to build financial statements based on their own estimates. (08/13/2018)</p> <p>Budget Rationale:</p> <p>Budget Request:</p>
<p>Business Ethics - Graduates will demonstrate an understanding of ethical accounting practices and the potential consequences of unethical business practices.</p>	<p>Direct - Field Placement/Internship Evaluation - Students completing internships must have at least one supervisor evaluation which includes an assessment of ethical conduct.</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: Yes</p> <p>100% of students who completed accounting internships received the desired rating. (08/25/2018)</p> <p>Optional Data Point 2:</p>	<p>Use of Result: Because the goal was met, no changes will be made currently based on these results. (08/25/2018)</p> <p>Budget Rationale:</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>Goal Status: Active Goal Category: Student Learning Start Date: Inactive Date: Goal Level (Bloom/Webb): Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal. Revision Notes: Assessment Year:</p>	<p>(Active) Criteria Target: 80% of accounting majors will receive a rating of average or above in the "Ethical Conduct" section. Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: High Impact Program Practices 2: Indirect - Survey, including faculty, supervisors, employers - Lukenda School of Business Professional Advisory Board Survey Criteria Target: 80% of board members will agree or strongly agree that LSB graduates lead moral and ethical lives. Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: High Impact Program Practices 2:</p>	<p>Optional Data Point: Finding Reporting Year: 2017-2018 Goal met: Yes 100% of students who completed accounting internships received the desired rating. (08/25/2018) Optional Data Point 2: Optional Data Point: Finding Reporting Year: 2017-2018 Goal met: Yes 89% (1 board member indicated he or she was "unable to rate") (08/25/2018) Optional Data Point 2: Optional Data Point: Finding Reporting Year: 2016-2017 Goal met: Yes There are no current results to report, as the survey is administered every other year. All board members who completed the survey in spring 2016 agreed or strongly agreed that LSB graduates lead moral and ethical lives. (08/25/2018) Optional Data Point 2: Optional Data Point:</p>	<p>Budget Request: Use of Result: Because the goal was met, no changes will be made currently based on these results. (08/25/2018) Budget Rationale: Budget Request: Use of Result: Because the goal was met, no changes will be made currently based on these results. The survey will be administered again in 2020. (08/25/2018) Budget Rationale: Budget Request: Use of Result: The survey will be administered again in 2018. (08/25/2018) Budget Rationale: Budget Request:</p>
<p>Global Business Awareness - Graduates will be aware of international accounting issues. Goal Status: Active Goal Category: Student Learning Start Date: Inactive Date: Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) Institutional Learning: Revision Notes: Assessment Year:</p>	<p>Direct - Exam/Quiz - Standardized - The ETS Major Field Test International section Criteria Target: The average score of accounting majors will be in the 75th percentile or higher in the international section of the test. Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: Not applicable to this outcome High Impact Program Practices 2: Not applicable to this outcome</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2016 - 98th percentile Spring 2017 - 92nd percentile (08/13/2018) Optional Data Point 2: Optional Data Point:</p>	<p>Use of Result: Because the goal was met, no changes will be made based on these results. Scores in the international section of the MFT will continued to be monitored to ensure accounting majors are receiving enough exposure to international business issues without being required to take an international business course (08/13/2018) Budget Rationale: Budget Request:</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
	<p>Direct - Exam/Quiz - Standardized - The CPA exam is a national standardized test taken by accounting students. The Financial Accounting and Reporting (FAR) section includes coverage of International Accounting Standards and issues. Criteria Target: LSSU pass rates will meet or exceed the national pass rates. Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: Not applicable to this outcome High Impact Program Practices 2: Not applicable to this outcome</p>	<p>Finding Reporting Year: 2017-2018 Goal met: Yes Fall 2017 - 27th percentile Spring 2018 - 98th percentile (08/13/2018) Optional Data Point 2: Optional Data Point:</p>	<p>Use of Result: Only one student took the MFT during the fall 2017 semester. The average score of accounting students for the year was in the 98th percentile. Because the goal was met, no changes will be made based on these results. Scores in the international section of the MFT will continued to be monitored to ensure accounting majors are receiving enough exposure to international business issues without being required to take an international business course. (08/13/2018) Budget Rationale: Budget Request:</p>
<p>Teamwork - Graduates will be able to work productively as a member of a team. Goal Status: Active</p>	<p>Indirect - Report/Audit - External - Students completing internships must have at least one supervisor evaluation which includes an</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes 100% of students who completed accounting internships during the year received the desired rating. (08/25/2018)</p>	<p>Use of Result: Because the goal was met, no changes will be made currently based on these results. (08/25/2018)</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>Goal Category: Student Learning Start Date: Inactive Date: Goal Level (Bloom/Webb): Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal. Revision Notes: Assessment Year:</p>	<p>assessment of teamwork abilities. Criteria Target: 80% of accounting majors will receive a rating of average or above in the teamwork section of the evaluation. Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: Internships High Impact Program Practices 2: Indirect - Survey, including self-evaluation, peers, or graduates - Senior Survey completed by graduating students in BUSN466 (Business Policy) Criteria Target: 80% of accounting majors will indicate their ability to work cooperatively with others is stronger or much stronger compared to their ability as freshmen. Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: High Impact Program Practices 2:</p>	<p>Optional Data Point 2: Optional Data Point: Finding Reporting Year: 2017-2018 Goal met: Yes 100% of students who completed accounting internships during the year received the desired rating. (08/25/2018) Optional Data Point 2: Optional Data Point: Finding Reporting Year: 2016-2017 Goal met: No Fall 2016 - 100% Spring 2017 - 50% (2 out of 4 students indicated their skills did not change) (08/25/2018) Optional Data Point 2: Optional Data Point: Finding Reporting Year: 2017-2018 Goal met: Yes 84% (3 out of 19 students indicated their skills did not change) (08/25/2018) Optional Data Point 2: Optional Data Point:</p>	<p>Budget Rationale: Budget Request: Use of Result: Because the goal was met, no changes will be made currently based on these results. (08/25/2018) Budget Rationale: Budget Request: Use of Result: Additional group assignments were incorporated into the 400-level accounting courses. (08/25/2018) Budget Rationale: Budget Request: Use of Result: Since the results improved over last year, the additional group assignments will continue to be utilized in the 400-level accounting courses. (08/25/2018) Budget Rationale: Budget Request:</p>
<p>Program Review - The Program provides evidence in support of Program Review in accordance with the Higher Learning Commission Criteria for Accreditation (4.A. The institution demonstrates responsibility for the quality of its educational programs. 1. The institution maintains a practice of regular program reviews.) Goal Status: Active Goal Category: Periodic Program Review</p>	<p>Indirect - Report/Audit - Internal - The Program conducts evidence-supported regular program review. The Program addresses the key components of the , incorporates feedback from assessment activities, and documents the impact of assessment findings and subsequent actions on student learning. Criteria Target: The Program Review will address the following criteria: 1. Contribution to LSSU Mission/Vision</p>		

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>Start Date: Inactive Date: Goal Level (Bloom/Webb): Institutional Learning: Revision Notes: Assessment Year:</p>	<p>2. Metrics of Productivity 3. Internal and External Program Demand 4. Program Quality 5. Program Assessment 6. Opportunity Analysis Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: High Impact Program Practices 2:</p>		
<p>2.1 Program Enrollment - Strategy 2.1 The Program establishes realistic goals for program enrollment that are optimistic, realistic, achievable. Goal Status: Active Goal Category: Enrollment Start Date: Inactive Date: Goal Level (Bloom/Webb): Institutional Learning: Revision Notes: Assessment Year:</p>	<p>Regular, recurring - The program sets goals for program enrollment which are time-based, progressive, achievable and quantitative. Criteria Target: Program Enrollment Growth Goal: _____ by _____ Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: High Impact Program Practices 2:</p>		
<p>Business Knowledge - Graduates will demonstrate knowledge of business-core subjects. Goal Status: Active Goal Category: Student Learning Start Date: Inactive Date: Goal Level (Bloom/Webb): Level 2 (Skills and Concepts) [Webb] Institutional Learning: ILD2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem. Revision Notes:</p>	<p>Direct - Exam/Quiz - Standardized - ETS Major Field Test in Business administered to graduating seniors in BUSN466 (Business Policy) Criteria Target: The Lukenda School of Business mean percent correct will equal or exceed the national mean in each assessment indicator area. Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: High Impact Program Practices 2:</p>	<p>Finding Reporting Year: 2016-2017 Goal met: No Fall 2016: The LSB met its goal in each assessment indicator area. Spring 2017: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas. (08/29/2018) Optional Data Point 2: Optional Data Point:</p>	<p>Use of Result: Significant improvement has been made in the Quantitative Analysis and Information Systems sections since a management professor with a strong quantitative background was hired and courses in information systems and analytics were added to the common professional component of all business bachelor degrees. Goals in these sections were met during the 2016 and 2017 fall semesters. The LSB mean was only slightly below the national mean during the 2017 spring semester.</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>Assessment Year:</p>			<p>(08/29/2018) Budget Rationale: Budget Request:</p>
<p>Professional Skills - Graduates will demonstrate skills in research, communications and critical thinking. Goal Status: Active Goal Category: Student Learning Start Date: Inactive Date: Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) (Bloom) Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability</p>	<p>Direct - Capstone Project - including undergraduate research - Business plan project completed in capstone course (BUSN466-Business Policy) Criteria Target: At least 80% of students will earn 80% or higher Schedule/Notes: Budget Implications (\$): High Impact Program Practices 1: Capstone Course(s), Projects High Impact Program Practices 2:</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2016 - 80% of students earned 80% of higher Spring 2017 - 100% of students earned 80% of higher (08/29/2018) Optional Data Point 2: Optional Data Point:</p>	<p>Use of Result: The LSB faculty member who teaches MGMT280 (Intro to Management Information Systems) and MGMT371 (Operations & Business Analytics) continues to make adjustments to teaching methods and assignments to deepen students' understanding of difficult concepts covered in these courses. Beginning fall 2018, the professor will implement quizzes to encourage students to read the textbook, assign graded homework, require an online subscription to study material and add more sophisticated Excel exercises. Also, she will begin the semester by giving a presentation on how to succeed in quantitative courses. (08/29/2018) Budget Rationale: Budget Request:</p> <p>Use of Result: LSB faculty and staff are pleased with the improvement shown, as the LSB fell short of its goal during both the fall 2015 (71%) and spring 2016 (78%) semesters. The instructor of BUSN466 equates the improvement in student performance to the following actions: The instructor spent more time with individual students early in the process to</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal.</p> <p>Revision Notes:</p> <p>Assessment Year:</p>		<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>Fall 2017 - 100% of students scored 80% of higher</p> <p>Spring 2018 - 95% of students scored 80% of higher (08/29/2018)</p> <p>Optional Data Point 2:</p> <p>Optional Data Point:</p>	<p>provide guidance and mentorship. The instructor provided the grading rubric with the syllabus which provided an outline of each section. The grading rubric also provided LSB faculty with data on which sections students need improvement in that can be tied back to course content. (08/29/2018)</p> <p>Budget Rationale:</p> <p>Budget Request:</p> <hr/> <p>Use of Result: LSB faculty and staff will review business plan results together at a School meeting each semester during which the instructor can provide feedback on student performance and curriculum adjustments can be discussed. (08/29/2018)</p> <p>Budget Rationale:</p> <p>Budget Request:</p>

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (If attached) or Filename (if emailed):	Degree Audit
This documentation is relevant to Question number:	Part 2 – Accounting Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The degree audit lists the program's requirements in terms of courses, credits, residency and GPA.

B.S. in Business Administration - Accounting Degree Audit

Name _____

A# _____

Intended graduation month/year ____/____

Advisor Approval _____

Degree Requirements

General Education Requirements

(Minimum 34 credits)

Common Professional Core (48 credits)

Table with 4 columns: Course ID, Credits, and two blank lines for tracking. Rows include ACTG132, BUSN121, ECON201, etc.

Major Requirements (41 credits)

Table with 4 columns: Course ID, Credits, and two blank lines for tracking. Rows include ACTG232, ACTG332, ACTG421, etc.

Oral & Written Communication (min. 9 credits)

Table with 4 columns: Course ID, Credits, and two blank lines for tracking. Rows include ENGL110, ENGL111, COMM101, etc.

Mathematics (minimum 3 credits)

MATH111 3 Satisfied thru major req.

Social Science (minimum 6 credits)*

BUSN121 3 Satisfied thru core course
ECON201 3 Satisfied thru core course

Natural Sciences (w/lab) (minimum 7 credits)*

3-4
3-4

Humanities (minimum 6 credits)*

3-4
3-4

Cultural Diversity (minimum 3 credits)

3

*2 courses from different disciplines (subjects) or 2 from interdisciplinary

Electives (to reach 124 credits)

Table with 4 columns: Course ID, Credits, and two blank lines for tracking.

- At least 124 credits
Residency - 30 hours
2.0 GPA
2.0 GPA in dept'l requirements

150 Hour Program: 26 credits

Each student, with the approval of their advisor, will define an individualized program to meet their interests & preferences.

I certify that all departmental requirements are complete and the departmental grade point average is 2.0 or higher.

X _____

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Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	CPA Examination Requirements
This documentation is relevant to Question number:	Bachelor of Science - Accounting Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The document shows how the program meets the CPA Examination education requirements.

In order to be eligible for the Uniform CPA Examination in Michigan, one must meet the following requirements:

Complete a curriculum required for a baccalaureate degree with a concentration in accounting from a regionally accredited U.S. education institution, including the completion of:

1. 3 semester hours in Auditing
2. 21 semester hours in accounting including study in each of the following:
 - 1) Financial Accounting and Accounting Theory
 - 2) Managerial Accounting, including Cost Accounting
 - 3) Accounting Systems and Controls
 - 4) U.S. Federal Taxation
 - 5) Governmental/Fund Accounting
3. 24 semester hours in general business subjects

Source: <https://nasba.org/exams/cpaexam/michigan/>

Lake Superior State University's Bachelor of Science in Accounting graduates meet these requirements by completing specific courses as follows:

1. Auditing
 - ACTG427 (Auditing) – 4 credit hours
2. Accounting
 - 1) Financial Accounting and Accounting Theory
 - ACTG132 (Principles of Accounting I) – 4 credit hours
 - ACTG232 (Intermediate Accounting I) – 4 credit hours
 - ACTG233 (Intermediate Accounting II) – 4 credit hours
 - ACTG432 (Advanced Accounting: Consolidations) – 4 credit hours
 - 2) Managerial Accounting, including Cost Accounting
 - ACTG133 (Principles of Accounting II) – 4 credit hours
 - ACTG332 (Cost Management I) – 4 credit hours
 - ACTG333 (Cost Management II) – 4 credit hours
 - 3) Accounting Systems and Controls
 - ACTG334 (Accounting Information Systems) – 3 credit hours
 - 4) U.S. Federal Taxation
 - ACTG421 (Federal Taxation Accounting I) – 3 credit hours
 - ACTG422 (Federal Taxation Accounting II) – 3 credit hours
 - 5) Governmental/Fund Accounting
 - ACTG433 (Advanced Accounting: Governmental) – 4 credit hours

3. General Business

- BUSN121 (Introduction to Business) – 3 credit hours
- BUSN211 (Business Statistics) – 3 credit hours
- BUSN231 (Business Communications) – 3 credit hours
- BUSN350 (Business Law) – 3 credit hours
- BUSN403 (Business, Government & Society) – 3 credit hours
- BUSN466 (Business Policy) – 3 credit hours
- ECON201 (Principles of Macroeconomics) – 3 credit hours
- ECON202 (Principles of Microeconomics) – 3 credit hours
- FINC341 (Managerial Finance) – 4 credit hours
- MGMT280 (Management Information Systems) – 3 credit hours
- MGMT360 (Management Concepts & Applications) – 3 credit hours
- MGMT371 (Operations & Business Analytics) – 3 credit hours
- MRKT281 (Marketing Principles & Strategies) – 3 credit hours

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	ACBSP Requirements
This documentation is relevant to Question number:	Bachelor of Science - Accounting Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The document shows how the program meets ACBSP requirements.

Criterion 6.1.3 Undergraduate Common Professional Component (CPC)

Programs that include a B.A. (with a business major), B.S. (with a business major), B.B.A., B.S.B.A., or objectives that imply general business preparation with or without a functional specialization must include coverage of the Common Professional Component (CPC) at the level prescribed by the ACBSP. The CPC as outlined below must be included in the content of the courses taught in the undergraduate programs of all accredited schools and programs. Each CPC area must receive a minimum coverage of two-thirds of a three (3) semester credit-hour course (or equivalent), or approximately 30 coverage hours.

UNDERGRADUATE COMMON PROFESSIONAL COMPONENT

Functional Areas	<ul style="list-style-type: none"> a. Marketing b. Business Finance c. Accounting d. Management, including Production and Operations Management, Organizational Behavior, and Human Resources Management
The Business Environment	<ul style="list-style-type: none"> e. Legal Environment of Business f. Economics g. Business Ethics h. Global Dimensions of Business
Technical Skills	<ul style="list-style-type: none"> i. Information Systems j. Quantitative Techniques/Statistics
Integrative Areas	<ul style="list-style-type: none"> k. Business Policies, or l. A comprehensive or integrating experience that enables a student to demonstrate the capacity to synthesize and apply knowledge and skills from an organizational perspective.

Figure 6.3
Abbreviated Course Syllabus

Course Number: ACTG132

Course Name: Principles of Accounting I

Instructor: Mindy McCready

Required Text: Wild: Financial Accounting: Information for Decisions, McGraw-Hill

Course description: An introduction to the principles of accounting as applied to proprietorships, partnerships and corporations. Areas of study include the accounting cycle for service and merchandising enterprises, internal control and items included in the asset section of the balance sheet.

<u>Topic Outline:</u>	<u>Hours</u>
I. Introducing Accounting in Business	4
A. Generally Accepted Accounting Principles	
B. Accounting Equation	
II. Analyzing and Recording Transactions	5
A. Debits and Credits	
B. Journalizing and Posting Transactions	
C. Trial Balance	
III. Adjusting Accounts and Preparing Financial Statements	5
A. Adjusting Entries	
B. Closing Entries	
C. Financial Statements	
IV. Reporting and Analyzing Merchandising Operations	4
A. Journal Entries for Sales of Inventory	
B. Journal Entries for Purchases of Inventory	
V. Reporting and Analyzing Inventories	4
A. Inventory Costing	
VI. Reporting and Analyzing Cash and Internal Controls	4
A. Internal Control	
B. Preparing a Bank Reconciliation	
C. Petty Cash Transactions	
VII. Reporting and Analyzing Receivables	4
A. Recording Credit Sales	

B. Recording Cash Receipts	
C. Estimating Bad Debts Expense	
VIII. Reporting and Analyzing Long-Term Assets	4
A. Accounting for Plant Assets	
B. Calculating Depreciation	
IX. Reporting and Analyzing Current Liabilities	4
A. Recording Current Liabilities	
B. Classifying Current Liabilities	
X. Reporting and Analyzing Long-Term Liabilities	5
A. Recording Bond Issuance	
B. Recording Bond Payments	
XI. Reporting and Analyzing Equity	5
A. Recording Stock Transactions	
B. Recording Dividend Transactions	
XII. Reporting and Analyzing Cash Flows	4
A. Statement of Cash Flows	
XIII. Analyzing and Interpreting Financial Statements	4
A. Horizontal Analysis	
B. Vertical Analysis	
C. Ration Analysis	
	<hr/>
Total Sessions (Coverage Hours)	56
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
c. Accounting	56
e. Legal Environment of Business	1
g. Business Ethics	<u>1</u>
Total Estimated CPC Coverage Hours	58

Figure 6.3
Abbreviated Course Syllabus

Course Number: ACTG133

Course Name: Principles of Accounting II

Instructor: Mindy McCreedy

Required Text: Brewer: Introduction to Managerial Accounting, McGraw - Hill

Course Description: This course emphasizes the role of managerial accounting information within a firm. Topics include budgeting, responsibility accounting, cost allocations, cost behavior, decision models, product costing, cost control, performance evaluation, capital budgeting, cash flows and methods of financial analysis.

<u>Topic Outline:</u>	<u>Hours</u>
I. Managerial Accounting and Cost Concepts	4.5
A. Need for managerial accounting information	
B. Comparison of Financial and Managerial Accounting	
C. Cost Classifications	
II. Systems Design: Job-Order Costing	4.5
A. Overview of Job-Order Costing	
B. Cost Flows in Job-Order Costing	
C. Problems of Overhead Application	
III. Systems Design: Activity-Based Costing	4.5
A. Assigning Overhead Costs to Products	
B. Designing an Activity-Based Costing System	
C. Cost Flows in an Activity-Based Costing System	
IV. Systems Design: Process Costing	4.5
A. Comparison of Job-Order and Process Costing	
B. Cost Flows in Process Costing	
C. Compute and Apply Costs	
V. Cost Behavior: Analysis and Use	4.5
A. Types of Cost Behavior Patterns	
B. Analysis of Mixed Costs	
C. Contribution Format Income Statement	
VI. Cost-Volume-Profit Relationships	4.5

A. Basics of Cost-Volume-Profit Analysis	
B. Target Profit and Break-Even Analysis	
VII. Profit Planning	5
A. Basic Framework of Budgeting	
B. Preparing the Master Budget	
VIII. Flexible Budgets and Performance Analysis	4.5
A. Preparing a Flexible Budget	
B. Flexible Budget Variances	
IX. Standard Costs	5
A. Calculating Price and Quantity Variances	
B. Variance Analysis	
X. Segment Reporting and Decentralization	4.5
A. Responsibility Accounting	
B. Evaluating Investment Center Performance	
XI. Relevant Costs for Decision Making	5
A. Identifying Relevant Costs and Benefits	
B. Adding and Dropping Product Lines and Segments	
C. Make or Buy Decision and Special Orders	
D. Utilization of a Constrained Resource	
XII. Capital Budgeting Decisions	5
A. Time Value of Money	
B. Net Present Value Method	
C. Internal Rate of Return	
	<hr/>
Total Sessions (Coverage Hours)	56
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
b. Business Finance	4
c. Accounting	56
d. Management	8
g. Ethics	<u>1</u>
Total Estimated CPC Coverage Hours	69

Figure 6.3
Abbreviated Course Syllabus

Course Number: BUSN121

Course Name: Introduction to Business

Instructors: Dr. Ralf Wilhelms

Required Text: Boone & Kurtz: Contemporary Business, Wiley

Course Description: The course introduces students to the many facets of American business. Areas covered include the free enterprise system, the American and other economic systems; starting up a business, the functional areas of business including ownership, accounting, finance, management of human resources, organization, production and marketing.

<u>Topic Outline:</u>	<u>Hours</u>
I. Business in a Global Environment	6
A. Changing the Face of Business	
B. Business Ethics and Social Responsibility	
C. Economic Challenges Facing Contemporary Business	
D. Competing in World Markets Information Systems	
II. Starting and Growing Your Business	4.5
A. Forms of Business Ownership and Organization	
B. Starting Your Own Business	
III. Management: Empowering People to Achieve Business	12
A. Management, Leadership, and the Internal Organization	
B. Human Resource Management: From Recruitment to Labor Relations	
C. Performance through Empowerment, Teamwork, and Communication	
D. Production and Operations Management	
IV. Marketing Management	6
A. Customer-Driven Marketing	
B. Product and Distribution Strategies	
C. Promotion and Pricing Strategies	
V. Managing Financial Resources	9.5
A. Understanding Accounting and Financial Statements	
B. The Financial System	
C. Financial Management	

VI. Managing Technology and Information	4
	<hr/>
Total Sessions (Coverage Hours)	42
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
a. Marketing	9
b. Business Finance	9.5
d. Management	9
e. Legal Environment of Business	4.5
g. Business Ethics	3
h. Global Dimensions of Business	6
i. Information Systems	<u>4</u>
Total Estimated CPC Coverage Hours	45

Figure 6.3
Abbreviated Course Syllabus

Course Number: BUSN211

Course Name: Business Statistics

Instructor: Brian Zinser

Required Text: Bowerman, O'Connell, & Orris: Essentials of Business Statistics, McGraw-Hill

Course description: An introduction to business statistics. Topics include the collection and presentation of data, measures of central tendency, variation and skewness, probability, probability distributions, sampling, sampling distributions, estimation, hypothesis testing, simple linear regression and correlation.

<u>Topic Outline:</u>	<u>Hours</u>
I. Introduction to Business Statistics	2
A. Populations, Samples	
B. Ratio, Interval, Ordinal, and Nominative Scales	
II. Descriptive Statistics	8
A. Shape of a Distribution	
B. Measures of Central Tendency	
C. Measures of Variation	
D. Percentiles, Quartiles, and Box and Whisper	
E. Percentile Rank	
III. Probability	2
A. Sample and Event Space	
B. Principles and Rules of Probability	
IV. Discrete Random Variables	4
A. Random Variables	
B. Discrete Probability Distributions	
C. Binomial Distribution	
V. Continuous Random Variables	4
A. Uniform Distribution	
B. Normal Probability Distribution	
VI. Sampling Distributions	4
A. Sampling Distribution of Sample Means	

B. Sampling Distribution of Proportions	
C. Central Limit Theorem	
VII. Confidence Intervals	3
A. Large Sample Confidence Intervals	
B. Small Sample Confidence Intervals	
C. Population Proportion Confidence Intervals	
VIII. Hypothesis Testing	5
A. Hypothesis Testing Procedure	
B. Null, Alternative Hypotheses and Error Types	
C. Large Sample Means Test	
D. P Value Approach	
E. Small Sample Means Test	
F. Population Proportion Test	
IX. Comparing Population Means	4
A. Large, Independent Samples Test	
B. Small, Independent Samples Test	
C. Paired Difference Test	
D. ANOVA	
X. Comparing Proportions and Chi-Square Test	3
A. Proportions, Large, Independent Samples Test	
B. Chi-Square Test	
XI. Sample Linear Regression	3
A. Simple Linear Regression Model/Prediction	
B. Coefficients of Determination and Correlation	
	<hr/>
Total Sessions (Coverage Hours)	42
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
j. Quantitative Techniques and Statistics	<u>42</u>
Total Estimated CPC Coverage Hours	42

Figure 6.3
Abbreviated Course Syllabus

Course Number: BUSN231

Course Name: Business Communications

Instructor: Dr. Linda Schmitigal - Snyder

Required Text: Lehman & Dufrene: BCOM3, South-Western

Course description: This course is designed to help you develop and refine the skills necessary to communicate effectively in a professional business environment. You will learn to plan, compose, and evaluate business documents, including letters, memos, and business reports; to use technology to communicate; and to prepare and deliver oral presentations.

<u>Topic Outline:</u>	<u>Hours</u>
I. Chapters 1 and 2	9
A. Be able to work in teams and have listening and etiquette skills	
II. Chapter 3	
A. Be able to communicate across cultures	3
III. Chapter 4	4
A. Be able to analyze, anticipate, and adapt to the writing process	
IV. Chapter 5	3
A. Be able to compose e-mail messages and memos	
V. Chapter 6	2
A. Be able to compose positive letters and messages	
VI. Chapter 7	2
A. Be able to create persuasive and marketing messages	
VII. Chapter 8	2
A. Be able to convey negative messages	
VIII. Chapters 9, 10, 11	10
A. Be able to prepare business reports	
IX. Chapter 12	1
A. Be able to give business presentations	

X. Chapter 13	4
A. Be able to search for jobs and prepare a professional resume and cover letter	
XI. Chapter 14	2
A. Be able to successfully interview for a job and follow-up on the interview	
	42
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
a. Marketing	1
d. Management	2
e. Legal Environment of Business	1
g. Business Ethics	2
i. Information Systems	$\frac{1}{7}$
Total Estimated CPC Coverage Hours	7

Figure 6.3
Abbreviated Course Syllabus

Course Number: BUSN350

Course Name: Business Law I

Instructor: Dr. Madan Saluja

Required Text: Twoney & Jennings: Anderson's Business Law and the Legal Environment, Cengage

Course description: The primary purpose of a course in business law is to develop an understanding of the basic principles of law that apply to business transactions. This portion of business law covers the law applicable to contracts, sales, personal property and bailments.

<u>Topic Outline:</u>	<u>Hours</u>
I. Chapter 12	3
A. List the essential elements of a contract	
B. Describe the way in which a contract arises	
C. State how contracts are classified	
D. Differentiate express contracts from implied contracts	
E. Differentiate contractual liability from quasi-contractual liability	
II. Chapter 13	2.5
A. Decide whether a statement is an offer or an invitation to negotiate	
B. Describe the exceptions that the law makes to the requirement of definiteness	
C. List all the ways an offer is terminated	
D. Compare offers, firm offers, and option contracts	
E. Define what constitutes the acceptance of an offer	
III. Chapter 14	2.5
A. Define contractual capacity	
B. State the extent and effect of avoidance of a contract by a minor	
C. Classify unilateral and bilateral mistakes	
D. Distinguish between innocent misrepresentation, fraud, and nondisclosure	
E. List those classes of persons who lack contractual capacity	
F. Distinguish between undue influence and duress	
IV. Chapter 15	2.5
A. Define what constitutes consideration	
B. State the effect of the absence of consideration	

- C. Distinguish between present consideration and past consideration
- D. State when forbearance can be consideration
- E. Recognize situations in which adequacy of consideration has significance
- F. List the exceptions to the requirement of consideration

V. Chapter 16 2

- A. State the effect of illegality on a contract
- B. Compare illegality and unconscionability
- C. Recognize when a contract is invalid because it obstructs legal processes
- D. State the elements of a lottery
- E. State the extent to which agreements not to compete are lawful

VI. Chapter 17 2.5

- A. State when a contract must be evidenced by a writing
- B. List the requirements of a writing that evidence a paper or electronic contract
- C. State the effects of the absence of a sufficient writing when a contract must be evidenced in writing
- D. List the exceptions that have been made by the courts to the laws requiring written evidence of contracts
- E. List exceptions to the parole evidence rule
- F. Compare the effects of objective and subjective intent of the parties to a contract
- G. State the rules for interpreting ambiguous terms in a contract
- H. State the effect of contradictory terms

VII. Chapter 18 2.5

- A. Distinguish between a third-party beneficiary and an incidental beneficiary
- B. Define an assignment of contract rights
- C. State the limitations on assignability and right to performance
- D. State the liability of the parties after a proper delegation of duties has been made
- E. Describe the status of an assignee with respect to defenses and setoffs available against the assignor
- F. State the significance of a notice of assignment
- G. State the liability of an assignor to an assignee

VIII. Chapter 19 2.5

- A. List the ways in which a contract can be discharged
- B. Distinguish between the effect of a rejected tender of payment and a rejected tender of performance
- C. Define when time is of the essence
- D. Compare performance to the satisfaction of the other contracting parties, performance to the satisfaction of a reasonable person, and substantial performance
- E. State when a consumer contract may be rescinded by the consumer
- F. Compare the discharge of a contract by rescission, cancellation, substitution, and novation

- G. State the effect on a contract of the death or disability of one of the contracting parties
 - H. Define the concept of economic frustration and impossibility
- IX. Chapter 20 2.5
- A. List and define the kinds of damages that may be recovered when a contract is broken
 - B. Describe the requirement of mitigation of damages
 - C. State when liquidated damages clauses are valid
 - D. State when liability-limiting clauses are valid
 - E. State when a breach of contract is waived
- X. Chapter 21 4
- A. Write a definition of personal property
 - B. List and explain various types of gifts
 - C. Identify the public policy reasons behind the law of escheat
 - D. Identify the four forms of multiple ownership of personal property
 - E. Describe how a bailment is created
 - F. List and distinguish the various classifications of bailments
 - G. Contrast the renting of space with the creation of bailment
 - H. Explain the standard of care a bailee is required to exercise over bailed property
- XI. Chapter 22 3.5
- A. Differentiate between negotiable and nonnegotiable warehouse receipts
 - B. List the three types of carriers of goods
 - C. State the common carrier's liability for loss or damage to goods
 - D. Explain the effect of a sale on a consignment
 - E. Describe a hotelkeeper's liability for loss of a guest's property
- XII. Chapter 23 2.5
- A. Define a sale of goods and explain when UCC Article 2 applies to contracts
 - B. Distinguish between an actual sale of goods and other types of transactions in goods
 - C. Describe how contracts are formed under Article 2, and list the differences in formation standards between the UCC and common law
 - D. State when a contract for the sale of goods must be in writing
 - E. List and explain the exceptions to the requirement that certain contracts be in writing
 - F. Explain the distinguishing features of a consumer lease and a finance lease
- XIII. Chapter 24 2.5
- A. Explain when title and risk of loss pass with respect to goods
 - B. Determine who bears the risk of loss when goods are damaged or destroyed
 - C. Discuss carrier liability and risk of loss
 - D. Explain why it is important to know when risk of loss and title pass in transactions for the sale of goods

- E. Describe the passage of title and risk in special situations, such as a sale or return or a sale on approval
- F. Classify the various circumstances in which title can be passed to a bona fide purchaser
- G. Discuss risk of loss and title in special situations, such as bailments, consignments, factors, sales on approval, and sale or return

XIV. Chapter 25

2.5

- A. List the theories of product liability
- B. Identify who may sue and who may be sued when a defective product causes harm
- C. List and define the implied warranties and distinguish them from express warranties
- D. Explain and distinguish between full warranties and limited warranties under federal law
- E. Describe the extent and manner in which implied warranties may be disclaimed under the UCC and the CISG

XV. Chapter 26

2.5

- A. Define the obligation of good faith as applied to merchants and nonmerchants
- B. List the steps that can be taken when a party to a sales contract feels insecure about the other party's performance
- C. Explain the obligations of the seller and the buyer in a sales contract
- D. Identify the types of actions and conduct that constitute acceptance

XVI. Chapter 27

2

- A. List the remedies of the seller when the buyer breaches a sales contract
- B. List the remedies of the buyer when the seller breaches a sales contract
- C. Determine the validity of clauses limiting damages
- D. Discuss the waiver of and preservation of defenses of a buyer

Total Sessions (Coverage Hours)

42

Summary of UG CPC Topics Covered in this Course:Hours

e. Legal Environment of Business

42

Total Estimated CPC Coverage Hours

42

Figure 6.3
Abbreviated Course Syllabus

Course Number: BUSN403

Course Name: Business, Government and Society

Instructor: Gerald Root

Required Text: Baron: Business and its Environment, Pearson/Prentiss Hall
The Wall Street Journal
The Becker-Posner Blog at www.becker-posner-blog.com

Course description: This course examines the relationships of the business firm to government and to society. The course focuses on the economic, legal, political, social and ethical environment of business firms. Topics include consumer protection, environmental regulation, antitrust, constitutional and administrative law, public choice theory, and other topics of current concern. The business firm is examined in the context of market and nonmarket capitalism and the global economy.

<u>Topic Outline:</u>	<u>Hours</u>
I. Market and Nonmarket Environments/Cases	2
II. Integrated Strategy/Cases	2
III. The News Media and Nonmarket Issues/Cases	2
IV. Private Politics/Cases	2
V. Political Theory and Government Institutions/Cases	2
VI. Nonmarket analysis of Business/Cases	2
VII. Implementing Nonmarket Strategies in Government Arenas/Cases	2
VIII. Antitrust: Economics, Law, and Politics/Cases	3
IX. Regulation: Law, Economics, and Politics/Cases	3
X. Environmental Protection: Economics, Politics and Management/Cases	3
XI. Law and Markets/Cases	3

XII. Information Industries and Nonmarket Issues/Cases	2
XIII. The Political Economy of International Trade Policy/Cases	2
XIV. Corporate Social Responsibility/Cases	2
XV. Ethics Systems: Utilitarianism/Cases	3
XVI. Ethics Systems: Rights and Justice/Cases	3
XVII. Implementing Ethics Systems/Cases	2
XVIII. Ethics Issues in International Business/Cases	2
	<hr/>
Total Sessions (Coverage Hours)	42

<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
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b. Business Finance	2
c. Accounting	2
d. Management	4
e. Legal Environment of Business	4
f. Economics	8
g. Business Ethics	11
h. Global Dimensions of Business	4
i. A comprehensive or integrating experience	7
Total Estimated CPC Coverage Hours	42

Figure 6.3
Abbreviated Course Syllabus

<u>Course Number:</u>	BUSN466
<u>Course Name:</u>	Business Policy
<u>Instructors:</u>	Dr. Ralf Wilhelms
<u>Required Text:</u>	Hill & Jones: Strategic Management: An Integrated Approach, Houghton Mifflin Company
<u>Course Description:</u>	This course provides an opportunity for the student to develop an understanding of the interrelationship of the various divisions, departments and functions of a business organization from a top management perspective.

<u>Topic Outline:</u>	<u>Hours</u>
I. Introduction to Strategic Management	6
A. External Analysis: Opportunities and Threats	
B. Internal Analysis: Distinctive Competencies, Competitive Advantage and Profitability	
II. Business Level Strategy and the Industry Environment	6
A. Building competitive Advantage through Functional Level Strategies	
B. Building Competitive Advantage through Business level Strategy	
III. Strategy in the Global Environment	3
IV. Conceptual Theories in Strategic Management	6
V. Implementing Strategy	
A. In Companies that Compete in a Single Industry	
B. In Companies that compete Across Industries and Countries	3
VII. Selected Applications	18
A. Case Study Strategy	
B. Business Plan	
Executive Summary	
Management Plan	
Technology	
Econ & Finance	
Legal and Social	
Accounting	

Marketing
Critical Thinking

Total Sessions (Coverage Hours) 42

Summary of UG CPC Topics Covered in this Course: Hours

a. Marketing	3
b. Business Finance	1.5
c. Accounting	3
d. Management	3
e. Legal Environment of Business	3
f. Economics	1.5
i. Information Systems	3
l. A comprehensive or integrating experience	<u>24</u>
Total Estimated Coverage Hours	42

Figure 6.3
Abbreviated Course Syllabus

Course Number: ECON201

Course Name: Principles of Macroeconomics

Instructor: Robert Boston

Required Text: McEachern: Macroeconomics a Contemporary Introduction, South-Western

Course Description: Nature and scope of economics; national income accounting; problems of unemployment and price instability; public revenues and expenditures; money and banking; fiscal and monetary policies to promote stability and economic growth.

<u>Topic Outline:</u>	<u>Hours</u>
I. The Art and Science of Economic Analysis	2
II. Some Tools of Economic Analysis	3
III. Demand and Supply Analysis	3
IV. Introduction to Macroeconomics	3
V. Tracking the U. S. Economy	3
VI. Unemployment and Inflation	2
VII. Productivity and Growth	3
VIII. Aggregate Expenditure	3
IX. Aggregate Expenditure and Aggregate Demand	3
X. Aggregate Supply	3
XI. Fiscal Policy	3
XII. Money and the Financial System	2
XIII. Banking and the Money Supply	3

XIV. Monetary Theory and Policy	3
XV. The Policy Debate: Active or Passive?	3
	<hr/>
Total Sessions (Coverage Hours)	42
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
£ Economics	<u>42</u>
Total Estimated CPC Coverage Hours	42

Figure 6.3
Abbreviated Course Syllabus

Course Number: ECON202

Course Name: Principles of Microeconomics

Instructor: Robert Boston

Required Text: Mankiw: Principles of Microeconomics, South-Western

Course Description: Principles of economic reasoning; supply and demand analysis; theories of production; price and output determination under each of the four market structures; factor returns and income distribution theories; public policy implications.

<u>Topic Outline:</u>	<u>Hours</u>
I. Ten Principles of Economics	1
II. Thinking Like an Economist	2
III. The Market Forces of Supply and Demand	3
IV. Elasticity and Its Application	3
V. Supply, Demand, and Government Policies	3
VI. Consumers, Producers, and the Efficiency of Markets	3
VII. International Trade	3
VIII. Externalities	3
IX. Public Goods and Common Resources	3
X. The Costs of Production	3
XI. Firms in Competitive Markets	3
XII. Monopoly	3
XIII. Monopolistic Competition	3
XIV. Oligopoly	3

XV. The Theory of Consumer Choice	3
	<hr/>
Total Sessions (Coverage Hours)	42
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
f. Economics	<u>42</u>
Total Estimated CPC Coverage Hours	42

Figure 6.3
Abbreviated Course Syllabus

Course Number: FINC341

Course Name: Managerial Finance

Instructor: Gerald Root

Required Text: Brigham & Houston: Fundamentals of Financial Management, South-Western

Course description: This course will teach the nature and scope of financial management including the time value of money, financial instruments, leverage and capital structure, financial planning and forecasting, risk and return analysis, working capital management, and capital budgeting, and multinational financial management.

<u>Topic Outline:</u>	<u>Hours</u>
I. Introduction	2
II. Financial Markets and Institutions	2
III. Financial Statements, Cash Flow, and Taxes	5
IV. Time Value of Money	5
V. Interest Rates	3
VI. Bonds and Their Valuation	4
VII. Risk and Rates of Return	3
VIII. Stocks and Their Valuation	4
IX. The Cost of Capital	4
X. Capital Budgeting	4
XI. Cash Flow Estimation and Risk Analysis	3
XII. Capital Structure and Leverage	3
XIII. Distributions to Shareholders: Dividends and Share Repurchases	3

XIV. Working Capital Management	4
XV. Financial Planning and Forecasting	4
XVI. Multinational Financial Management	3
	<hr/>
Total Sessions (Coverage Hours)	56
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
b. Business Finance	22
c. Accounting	14
e. Legal Environment of Business	3
g. Business Ethics	5
h. Global Dimensions of Business	3
j. Quantitative Techniques/Statistics	3
k. Business Policies	3
l. A comprehensive or integrating experience	<u>3</u>
Total Estimated CPC Coverage Hours	56

Figure 6.3
Abbreviated Course Syllabus

<u>Course Number:</u>	MGMT280
<u>Course Name:</u>	Management Information Systems
<u>Instructor:</u>	Dr. C. Christopher Lee
<u>Required Text:</u>	Laudon: Management Information Systems: Managing the Digital Firm, Prentice Hall

Course description: This course will introduce students to MIS theories including (1) Information Systems in Business and Society (information management in global society; security, privacy and ethical issues); (2) Information Technology Concepts (hardware technology, software technology, database management systems, network and internet technology); (3) Business Information Systems (automation and support systems, transaction processing systems, management information systems, decision support and expert systems, enterprise systems such as ERP); (4) Systems Development (systems investigation and analysis, systems planning development and implementation). Students will gain hands-on computer skills in advanced spreadsheet, database, and web technologies. Prerequisites: BUSN121 and ACTG132 with a grade of C or higher, and computer competency.

<u>Topic Outline:</u>	<u>Hours</u>
I. Overview of Information Systems	3
II. Global E-Business and Collaboration	3
III. Information Systems, Organizations, and Strategy	2
IV. Ethical and Social Issues in Information Systems	2
V. Developing Business Applications with MS Excel	4
VI. IT Infrastructure and Emerging Technologies	2
VII. Database Management	2
VIII. Telecommunications, the Internet, and Wireless Technology	2
IX. Information Security	2
X. Enterprise Applications	2

XI. E-Business Models	2
XII. Knowledge Management Systems	2
XIII. Decision Support Systems	2
XIV. Developing Business Applications with MS Access	8
XV. Systems Analysis and Design	2
XVI. Project Management	2
	<hr/>
Total Sessions (Coverage Hours)	42
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
a. Marketing	0.5
b. Business Finance	0.5
c. Accounting	0.5
d. Management	6
e. Legal Environment of Business	0.5
f. Economics	0.5
g. Business Ethics	1
h. Global Dimensions of Business	4
i. Information Systems	40
j. Quantitative Techniques/Statistics	1.5
k. Business Policies	<u>1</u>
Total Estimated CPC Coverage Hours	56

Figure 6.3
Abbreviated Course Syllabus

Course Number: MGMT360

Course Name: Principles of Management

Instructor: Dr. C. Christopher Lee

Required Text: Daft: Management, Cengage

Course description: The purpose of this course is to learn how management theory is applied in organizations today. Understanding the planning, organizing, leading, and controlling functions allows the theory and concepts to be applied to case analyses and current issues of concern to managers. The objective is to develop an understanding of the underlying principles, how these principles have evolved, and how these principles are applied in organizations today.

<u>Topic Outline:</u>	<u>Hours</u>
I. Overview	7
A. Introduction	
B. Management Theories	
C. Organizational Culture	
II. Planning	7
A. Strategic Planning	
B. Strategic Management	
III. Organizing	7
A. Organizational Structures	
B. Organization Development	
C. Human Resource Management	
IV. Leading	7
A. Understanding Individual Behavior	
B. Leadership	
C. Motivation Theories	
V. Controlling	6
A. Managing Quality – Total Quality Management	
B. Managing Performance – Balanced Scorecard Model	
VI. Other Management Topics	8
A. Business Ethics	

- B. International Management
- C. Small Business Management
- D. Change Management

Total Sessions (Coverage Hours)	42
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
b. Business Finance	1
d. Management	37
e. Legal Environment of Business	1
g. Business Ethics	3
h. Global Dimensions of Business	5
i. Information Systems	1
j. Quantitative Techniques/Statistics	1
k. Business Policies	<u>1</u>
Total Estimated CPC Coverage Hours	50

Figure 6.3
Abbreviated Course Syllabus

Course Number: MGMT371

Course Name: Operations and Business Analytics

Instructor: Dr. C. Christopher Lee

Required Text: Custom designed by C. Christopher Lee: Operations & Business Analytics, Cengage

Course description: This course introduces students to (1) Operations Management (operations strategy, operations design, operations planning & control, operations execution), (2) Supply Chain Management, and (3) Quantitative Business Analysis (linear programming, project scheduling including PERT and CPM, inventory modeling, statistical process control, queuing theory, simulation, decision analysis, time-series forecasting, advanced statistical analysis). Prerequisite: BUSN211 or equivalent.

<u>Topic Outline:</u>	<u>Hours</u>
I. Hypothesis Testing	1
II. T-Test Model	1
III. ANOVA Model	3
IV. Simple Regression Model, Correlation Analysis	2
V. Multiple Regression Model	3
VI. Forecasting Model	3
VII. Statistical Process Control Models	3
VIII. Data Mining	1
IX. Decision Tree Model	1
X. Linear Programming Model	6
XI. Queuing Model	2
XII. Simulation Model	2

XIII. Operations Management	2
XIV. Operations Strategy	2
XV. Inventory Model	3
XVI. Supply Chain Management	4
XVII. Just-In Time System	1
XVIII. PERT/CPM Model	2

Total Sessions (Coverage Hours)	42
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<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
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a. Marketing	0.5
b. Business Finance	0.5
c. Accounting	0.5
d. Management	1
e. Legal Environment of Business	0.5
f. Economics	0.5
g. Business Ethics	1
h. Global Dimensions of Business	1
i. Information Systems	5
j. Quantitative Techniques/Statistics	40
k. Business Policies	0.5
l. Comprehensive or Integrating Experience	<u>5</u>
Total Estimated CPC Coverage Hours	56

Figure 6.3
Abbreviated Course Syllabus

Course Number: MRKT281

Course Name: Marketing Principles and Strategy

Instructors: Valerie Philips

Required Text: Pride & Ferrell: Marketing, Houghton-Mifflin

Course Description: A study of marketing principles, variables, institutions, target markets, and the marketing mix, with emphasis on the development of marketing strategy. Topics studied include the marketing environment, marketing ethics, consumer buying habits and motives, market research, product development and management, distribution, pricing, and market segmentation, targeting and positioning.

<u>Topic Outline:</u>	<u>Hours</u>
I. Marketing Overview	4
A. Macro- and Microenvironments	
B. Environmental Scanning and Analysis	
C. The Case Method	
II. Strategic Marketing Planning	4
A. Corporate Strategic Planning	
B. Marketing Planning	
C. Marketing Ethics	
D. Social Responsibility	
III. Target Markets	8
A. Consumer Behavior	
B. Market Segmentation	
C. Market Targeting	
D. Market Research	
III. Product	7
A. Classification	
B. Positioning	
C. Branding, Packaging and Labeling	
D. New Product Development	
E. Product Adoption	

IV. Promotion	7
A. Promotion mix and goals	
B. Advertising	
C. Social media	
D. Publicity	
E. Sales Promotion	
F. Personal Selling	
V. Distribution	4
A. Role and use of Marketing Intermediaries	
B. Retailing	
C. Wholesaling	
D. Channels of Distribution	
VI. Pricing	4
A. Pricing strategy	
B. Marketing math	
VII. Selected Applications	4
A. Case Studies	
B. Industrial Marketing	
C. International Marketing	
D. Non-business Marketing	
E. Analysis of real life marketing efforts	
<hr/>	
Total Sessions (Coverage Hours)	42
<u>Summary of UG CPC Topics Covered in this Course:</u>	<u>Hours</u>
a. Marketing	42
d. Management	10
c. Legal Environment of Business	1
f. Economics	2
g. Business Ethics	5
h. Global Dimensions of Business	5
j. Quantitative Techniques/Statistics	2
l. A comprehensive or integrating experience	<u>10</u>
Total Estimated CPC Coverage Hours	77

Figure 6.5
Table of Undergraduate Common Professional Component (CPC) Compliance

Core Courses	Hour Class Sessions by CPC Topic											Totals
	a. MRKT	b. FINC	c. ACTG	d. MGMT	e. LAW	f. ECON	g. ETHICS	h. GLOBAL	i. IS	j. QM Stats	k. & l. POLICY	
ACTG132			56		1		1					58
ACTG133		4	56	8			1					69
BUSN121	9	9.5		9	4.5		3	6	4			45
BUSN211										42		42
BUSN231	1			2	1		2		1			7
BUSN350					42							42
BUSN403		2	2	4	4	8	11	4			7	42
BUSN466	3	1.5	3	3	3	1.5			3		24	42
ECON201						42						42
ECON202						42		3				45
FINC341		22	14		3		5	3		3	6	56
MGMT280	0.5	0.5	0.5	6	0.5	0.5	1	4	40	1.5	1	56
MGMT360		1		37	1		3	5	1	1	1	50
MGMT371	0.5	0.5	0.5	1	0.5	0.5	1	1	5	40	5.5	56
MRKT281	42			10	1	2	5	5		2	10	77
Totals	56	41	132	80	61.5	96.5	33	31	54	89.5	54.5	

Criterion 6.1.4.a. Curriculum Design Beyond CPC

In order to empower graduates to become experts in their fields of study, the curriculum of each LSB program provides breadth and depth beyond the CPC through advanced and specialized business courses. LSB considers the following when designing and making modifications to the curriculum of its majors:

- Program objectives
- Senior, alumni and professional advisory board survey results
- Requirements of other universities
- Professional examination & certification requirements

LSSU prides itself in its ability to offer numerous programs with significant experiential learning activities. Through this reflective type of learning, students are able to take the theoretical concepts they've learned in the classroom and apply the concepts to real-world situations. The LSB provides numerous opportunities for students to use critical-thinking skills to solve problems and analyze data to make decisions. The following are some examples:

- Business students may earn academic credit through internships in their fields of study.
- Accounting students in the Income Tax Practicum course prepare income tax returns for low-income members of the community through the IRS-sponsored Volunteer Income Tax Assistance (VITA) program.
- Marketing students in the Sports and Events Marketing course plan, execute and evaluate an actual fundraising event for a local or national charity.
- International business students participate in an international experience which involves study abroad, work experience, or internships.
- Participants in Enactus use business concepts to develop community outreach projects that improve the quality of life and standard of living for people in need.
- Students participating in the Investment Club manage a diversified portfolio by following economic and market data and conducting fundamental stock analysis.

Criterion 6.1.4.b. Curriculum Design for General Education

LSSU recognizes that the fostering of general knowledge is a critical component of its larger mission to help students develop their full potential. General education provides much of the framework for a student's ability to engage fully with the academically-rigorous program of her or his choosing and to be able, within that program, to articulate concepts clearly for diverse audiences, as well as to comprehend and analyze ideas within artistic, social, scientific, and mathematical contexts. The following is LSSU's general education mission statement (<http://www.lssu.edu/cmscatalog1314/gen-ed-requirements.php>):

In a diverse and changing world, college graduates must be prepared for a lifetime of learning in a variety of fields. In order to meet this challenge, general education requirements foster the development of general skills and knowledge that are further developed throughout the curriculum. LSSU graduates will be able to:

- *Analyze, develop, and produce rhetorically complex texts*
- *Communicate competently in a variety of contexts (Communication Outcomes)*
- *Analyze, evaluate, and explain human aesthetics and its historical development (Humanities Outcomes)*
- *View the world from cultural perspectives other than their own (Diversity Outcomes)*
- *Incorporate empirical evidence in the analysis of the causes and consequences of natural phenomena (Natural Science Outcomes)*
- *Think critically and analytically about the causes and consequences of human behavior (Social Science Outcomes)*
- *Analyze situations symbolically and quantitatively in order to make decisions and solve problems (Mathematics Outcomes)*

All LSSU undergraduate students are subject to the following general education requirements:

- Communication skills – 9 credits from 3 courses
- Humanities – Minimum of 7 credits from 2 courses
- Diversity – Minimum of 3 credits from 1 course
- Natural Science – Minimum of 7 credits from 2 courses
- Social Science – Minimum of 6 credits from 2 courses
- Mathematics – Minimum of 3 credits from 1 course

The requirements of each LSB program are summarized in [Figure 6.6](#) below.

Although some LSB programs do not quite meet the ACBSP 40% general education requirement, the school will not make related curriculum changes at this time. LSSU has a general education committee that determines general education requirements for each program. The committee is currently working on a large-scale project to assess and improve general education at LSSU using data such as freshmen/senior ETS test results, senior exit surveys and the Michigan Merit Curriculum (<http://www.lssu.edu/assessment/generaleducation.php>).

Criterion 6.1.5 Other Business-related Programs

The LSB is not seeking accreditation for any business-related programs.

Criterion 6.1.6 Curriculum Design in Graduate Programs

The LSB does not currently offer any graduate programs.

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Business Plan Grading Rubric
This documentation is relevant to Question number:	Bachelor of Science - Accounting Question #16
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides an example of the challenging assignments students complete.

BUSN466 Business Plan – Grading Rubric

Student Name: _____ Business: _____

	<u>Possible</u>	<u>Actual</u>
Executive Summary (65 points)	65	
<u>Management Plan (50)</u>	50	
The Company (5)		
Mission Statement (10 points)		
Intellectual Property /Company Location (5 points)		
SWOT Analysis (10 points)		
Management & Organization (10)		
Management Team, Staffing, Board of Directors (10)		
<u>Technology Outline (20)</u>	20	
Internet, Hardware Needs, Software Needs		
<u>Econ & Finance (65)</u>	65	
Industry Analysis (25)		
Size and Growth Rate of the Industry (10 points)		
Trends (5 points)		
Opportunities (5 points)		
Barriers of Entry (5 points)		
<u>The Competition (55)</u>	55	
Competitors Direct-Indirect (10 points)		
Market Share Distribution (10 points)		
Competitive Advantages (10 points)		
Break even analysis (10)		
Financial Assumptions,		
Capital Requirements (15 points)		
<u>Legal and Social (20)</u>	20	
The Company (5)		
Ownership (10)		
Business license (5)		
<u>Accounting (70)</u>	70	
Monthly Profit and Loss Statement (20 points)		
Annual Income statements 3 years (20 points)		
Cash flow analysis (20 points)		
Balance Sheet (10 points)		

<u>Marketing (80)</u>	80
Target Market (10 points)	
Market Analysis (10 points)	
Demographics (10 points)	
Positioning (5 points)	
Industry Trend (5 points)	
Company Strengths (5 points)	
Promotional Mix (15)	
Marketing Mix 4 p's (20)	
<u>Critical Thinking (20)</u>	20
Milestones & Exit Strategy (10)	
Goals, Strategies, Milestones, Risk Evaluation, Exit Plan (10)	
Appendix (20 points)	20
APA (20 points)	20
Grammar/punctuation/writing style (15 points)	15
Total	500

PART 2: Degree-Level Review

Degree Program: Bachelor of Science – Business Administration

Explain how the program works to address each of the following questions. For each question, respond with a narrative and supporting evidence.

Assessment (CC 4.B and CC 4.C)

13. Provide evidence that the degree-level program outcomes are clearly stated and are effectively assessed, including the “use of results.” Attach the 4-Column Program Assessment Report.

LSB offers its four-year business administration program at the main campus in Sault Ste. Marie and at regional centers in Petoskey and Escanaba, in Michigan, allowing students from northern Michigan and Northern Ontario, Canada access to a quality business education. LSB is committed to serving the local and regional communities by providing a qualified labor force that can attract new businesses and serve existing businesses, nonprofits and government agencies. We offer business administration courses on a rotating-basis, online, and through the week (including evenings and weekends) to accommodate traditional and nontraditional students on all three campuses.

The business administration program includes the core business curriculum providing a broad business knowledge and a specialization (minor) in one of the business disciplines: Accounting-Finance, Economics-Finance, Human Resources Management, International Business, Marketing, Public Relations, Sports Marketing or cognate of 15 or more credits preapproved by the dean of the LSB. Courses within the business core and specializations are within the purview of the related bachelor’s degree programs. For example, FINC 341 Managerial Finance is covered in the Finance program and BUSN 211 Introduction to Business Statistics is within the purview of the business administration program. The business administration program outcomes include:

- A. **Business Core.** Graduates will be able to demonstrate knowledge of business core subjects including finance, accounting, legal, management, marketing, economics and statistics.
- B. **Business Plan.** Graduates will demonstrate skills in research, communication and critical thinking.

The attached “4-Column Program Assessment Report for Business Administration BS” provides support for clearly stated degree-level program outcomes, effective assessments, including the use of results. We use a variety of assessments for the program outcomes, including independent and objective assessments (such as the Major Field Test in Business) and the capstone project in BUSN 466 – Business Policy. See chart below.

Outcomes	Assessment
Business Core	Major Field Test in Business
Business Plan	Capstone Project

14. Explain how results from degree assessments were used to improve the degree program. Include specific examples.
- A. For example, LSB teaches and measures knowledge of *business core* subjects. A key program outcome: *Graduates will be able to demonstrate knowledge of business core subjects.*

Assessment: We use the Major Field Test in Business, administered in BUSN 466 Business Policy to all graduating seniors, in order to gather data to support that students can demonstrate strong knowledge in business core subjects. Our target is for our business administration students to equal or exceed the national mean in each assessment indicator area.

Assessment Results: See chart below.

Semester	Percentile Rank – Bus admin students
Fall 2016	69 th percentile
Spring 2017	50 th percentile
Fall 2017	56 th percentile
Spring 2018	96 th percentile

Use of Results: For the 2016-2017 academic year there were no concerns at the time of review by faculty; however, we continued to monitor results annually. During 2017-2018, we made significant improvements in the Quantitative Analysis and Information Systems sections of the MFT. We continue to make adjustments within the BUSN 211, MGMT 371 and MGMT 280 courses to teaching methods and assignments to improve on these areas of the MFT.

- B. For example, LSB teaches and measures *research, communication and critical thinking skills*. A key program outcome: *Graduates will demonstrate skills in research, communication and critical thinking.*

Assessment: In BUSN 466 – Business Policy, students are required to develop a business plan. The business plan requirements include all aspects of building a business, including *pro forma* financial statements, feasibility study, marketing analysis and plan, financing, legal considerations, and management/operations. Our target is for 80% of students to achieve a score of 80% or higher.

Assessment Results: During both academic years 2016-2017 and 2017-2018, 100% of students scored 80% or higher, achieving the target outcome.

Use of Results: LSB faculty and staff review business plan results at an end-semester school meeting where the instructor of BUSN 466 provides feedback on student performance and curriculum adjustments are discussed. Since the business plan is the capstone project, LSB faculty should be involved in the assessment of the business plans. Ideas of involvement discussed among the faculty include: grading portions of the business plan as it relates to a particular discipline (such as financial statements are reviewed and graded by accounting faculty, marketing plan by the marketing faculty); grading the student presentation in the same vein as mentioned; and faculty mentorship of a group of students.

Quality, Resources and Support (CC 3.A)

15. Explain how the program ensures that degree program-level and course-level learning outcomes are at an appropriate level. Attach evidence, including a degree audit for the program.

LSB regularly reviews, monitors and improves its programs to ensure delivery of quality business education as supported by its success in achieving programmatic accreditation from the ACBSP. The extent to which each program course addresses student learning objectives is provided on the chart below. These student learning objectives were generated for the ACBSP accreditation; however, they answer the question asked about outcomes being at an appropriate level. In addition, the degree audit for the business administration program follows.

Intellectual Inquiry (CC 3.B).

16. Explain what the program does to engage students in collecting, analyzing, and communicating information; mastering modes of inquiry or creative work; developing skills integral to the degree program. Attach examples of undergraduate research, projects, and creative work.

A. Collecting, analyzing, and communicating information and mastering modes of inquiry or creative work.

Student business plans demonstrate intellectual inquiry in the business program. See example of a business plan prepared by a business administration student.

B. Developing skills integral to the degree program

The examples below demonstrate a variety of methods used in the business administration program and courses that engage students in developing skills integral to the degree program.

Student Clubs (Contributing to the Profession and the Community)

Business Administration students participate in Enactus and SHRM student clubs.

Enactus is a community of student, academic, and business leaders committed to using the power of entrepreneurial action to transform lives and shape a better, more sustainable, world. Enactus is a worldwide organization in over 36 countries. There are over 535 competing teams alone in the United States, and more than 1,600 in the world. More than 66,000 students involved in Enactus put in over 7 million volunteer hours per year to help improve people's livelihoods.

Enactus has worked with people and organizations in the local area such as the Diane Pepler Resource Center, elementary schools, and Friends of Caring Animal Shelters (FOCAS). Projects have even included far-away places such as Cameroon, Africa.

Members participate in the national Enactus job fair. LSSU always has a few members leave the competition with jobs in hand. Participating companies have included established names such as Hershey, Ford, Home Depot and Walmart. Enactus has over 300 corporate sponsors.

SHRM Student Chapter of LSSU is part of the world's largest human resource management association. SHRM was founded in 1948 and serves over 575 chapters worldwide. The LSSU Chapter became an official SHRM Chapter in the spring of 2013. The goal of SHRM is to help business professionals engage, grow and connect. For students, SHRM offers a vast assortment of resources such as SHRM publications, webcasts, conferences, career-networking opportunities, and HR career resources.

SHRM events include human resources professional speakers and conferences. Past speakers were from War Memorial, Old Mission Bank and LSSU.

The chapter also helps those in the club prepare for HR certification which takes place during the spring semester. In the past, students in the Business Administration – Management program sat for the SHRM exam and passed, representing a 100 percent pass rate for LSB students, while the SHRM national pass rate is 62 percent.

Sustainable Business Strategy Club

Students who join this club will engage in meaningful projects and support purpose-driven businesses. As purpose-driven leaders, students will transform firms or initiate start-ups or events as catalysts for positive change. Two areas of interest that students will initiate or create calls for include: (a) sustainable business projects and, (b) support students in sustainable business start-ups.

Annually, LSB inducts business administration program students into the business honor society, Sigma Beta Delta. The society is considered to be one of the highest forms of national recognition a business student can achieve, open to juniors and seniors and selected based on class ranking and student involvement.

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	4-Column Program Assessment Report for Business Administration BS
This documentation is relevant to Question number:	Assessment Questions #13 and #14
Briefly summarize the content of the file and its value as evidence supporting program review:	This document supports the evidence required to answer Assessment Questions #13 and #14 on program outcomes, assessment, and use of results.

Assessment: Reporting Unit Four Column

Program (CoS) - Business Administration BS

Assessment Contact: Prof. Mindy McCreedy

Mission Statement: Through dedication to excellence in teaching, the Lukenda School of Business develops students to become economically, socially, and environmentally responsible, and empowers them to become business and community leaders in a global society.

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>Business Core - Graduates will be able to demonstrate knowledge of business core subjects.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom]</p> <p>Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem.</p>	<p>Direct - Exam/Quiz - Standardized - ETS major field test in business will be administered in BUSN 466 (Business Policy) and the scores are recorded.</p> <p>Criteria Target: LSB mean percent correct will equal or exceed the national mean in each assessment indicator area.</p>	<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>Fall 2017-There was only one student who took the exam in this program. The score was in the 56th percentile.</p> <p>Spring 2018-The average score was in the 96th percentile. (08/13/2018)</p>	<p>Use of Result: Significant improvement has been made in the Quantitative Analysis and Information Systems sections since a management professor with a strong quantitative background was hired and courses in information systems and analytics were added to the common professional component of all business bachelor degrees. Goals in these sections were met during the 2016 and 2017 fall semesters. The LSB mean was only slightly below the national mean during the 2017 and 2018 spring semesters.</p> <p>The LSB faculty member who teaches MGMT280 and MGMT371 continues to make adjustments to teaching methods and assignments to deepen students' understanding of difficult concepts covered in these courses.</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
		<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2016-Their total score is in the 69th percentile. Spring 2017-Their total score is in the 50th percentile. (08/13/2017)</p>	<p>Beginning fall 2018, the professor will implement quizzes to encourage students to read the textbook, assign graded homework, require an online subscription to study material and add more sophisticated Excel exercises. Also, she will begin the semester by giving a presentation on how to succeed in quantitative courses. (08/13/2018)</p> <p>Use of Result: No concerns at this time. Continue to monitor results in 2017-2018. (08/13/2017)</p>
<p>Business Plan - Graduates will demonstrate skills in research, communication and critical thinking. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): High-Level (Creating/Evaluating) (Bloom) Institutional Learning: ILO1 - Formal Communication - Students will develop and clearly express complex ideas in written and oral presentations., ILO3 - Analysis and Synthesis - Students will organize and synthesize evidence, ideas, or works of Imagination to answer an open-ended question, draw a conclusion, achieve a goal, or create a substantial work of art. , ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when</p>	<p>Direct - Capstone Project - Including undergraduate research - Students in BUSN466 [Business Policy] will complete a business plan project. Criteria Target: At least 80% of students will score 80% or higher. High Impact Program Practices 1: Capstone Course(s), Projects</p>	<p>Finding Reporting Year: 2017-2018 Goal met: Yes Fall 2017- 100% of the students scored 80% or higher. Spring 2018-100% of the students scored 80% or higher. (08/13/2018)</p>	<p>Use of Result: LSB faculty and staff will review business plan results together at a School meeting each semester during which the instructor can provide feedback on student performance and curriculum adjustments can be discussed.</p> <p>Since the business plan is the capstone course project for all business programs, LSB faculty have concluded they all need to be involved in some capacity. During the fall 2018 semester, LSB faculty will develop a plan to be implemented during the spring 2019 semester when the majority of seniors will take BUSN466. Ideas being considered include participation in grading the written portion or the</p>

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
answering a question, solving a problem, or achieving a goal.		<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2016-100% of the students scored 80% or higher. Spring 2017-100% of the students scored 80% or higher. (08/13/2017)</p>	<p>presentation portion or mentorship of a group of students. (08/13/2018)</p> <hr/> <p>Use of Result: No concerns at this time. Continue to monitor in 2017-2018. (08/13/2018)</p>

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Degree Audit
This documentation is relevant to Question number:	Part 2 – Business Administration Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The degree audit lists the program's requirements in terms of courses, credits, residency and GPA.

Lukenda School of Business
B.S. in Business Administration
Degree Audit

Name _____

A# _____

Intended graduation month/year ____/____

Advisor Approval _____

Degree Requirements

General Education Requirements

(Minimum 34 credits)

Common Professional Core (48 credits)

ACTG132	4	_____	_____
ACTG133	4	_____	_____
BUSN121	3	_____	_____
BUSN211	3	_____	_____
BUSN231	3	_____	_____
BUSN350	3	_____	_____
BUSN403	3	_____	_____
BUSN466	3	_____	_____
ECON201	3	_____	_____
ECON202	3	_____	_____
FINC341	4	_____	_____
MGMT280	3	_____	_____
MGMT360	3	_____	_____
MGMT371	3	_____	_____
MRKT281	3	_____	_____

Oral & Written Communication (min. 9 credits)

ENGL110	3	_____	_____
ENGL111	3	_____	_____
COMM101		_____	_____
COMM201 or	3	_____	_____
COMM225		_____	_____

Mathematics (minimum 3 credits)

MATH111 3 Satisfied thru major req.

Social Science (minimum 6 credits)*

BUSN121 3 Satisfied thru core course
 ECON201 3 Satisfied thru core course

Natural Sciences (w/lab) (minimum 7 credits)*

_____ 3-4 _____
 _____ 3-4 _____

Humanities (minimum 6 credits)*

_____ 3-4 _____
 _____ 3-4 _____

Cultural Diversity (minimum 3 credits)

_____ 3 _____

***2 courses from different disciplines (subjects) or
 2 from interdisciplinary**

Major Requirements (3 credits)

MATH111 3 _____

**Disciplinary Requirement: Pick one
 Minor from the following:**

(Students cannot double major in discipline in which
 minor is selected.)

- Accounting-Finance
- Economics-Finance
- Human Resource Management
- International Business
- Marketing
- Public Relations
- Sports Marketing
- Cognate of 15 or more credits approved by the Dean

Electives (to reach 124 credits)

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

- _____ At least 124 credits
- _____ Residency - 30 hours
- _____ 2.0 GPA
- _____ 2.0 GPA in dept'l requirements

I certify that all departmental requirements are complete and
 the departmental grade point average is 2.0 or higher.

X _____
 Department Head, Lukenda School of Business

Lukenda School of Business
Business Administration
- Bachelor of Science Degree -

Sample Program

FALL		SPRING		
<u>First Year</u>				
ACTG 132	Principles of Accounting I	4	ACTG 133 Principles of Accounting II	4
ENGL 110	First-Year Composition I	3	Humanities Elective	3
MATH 111	College Algebra	3	ENGL 111 First-Year Composition II	3
BUSN 121	Introduction to Business	3	COMM 101 Fund. of Speech Communication	3
		13	MRKT 281 Marketing Principles & Strategies	3
				16
<u>Second Year</u>				
BUSN 350	Business Law I	3	MGMT280 Intro. To Mgmt Info. Systems	3
BUSN 231	Business Communications	3	ECON 202 Principles of Microeconomics	3
ECON 201	Principles of Macroeconomics	3	Humanities Elective	4
	Gen Ed science w/lab	4	Electives	6
BUSN 211	Business Statistics	3		16
		16		
<u>Third Year</u>				
FINC 341	Managerial Finance	4	MGMT 371 Operations/Business Analytics	3
MGMT 360	Mgmt Concepts and Applications	3	Gen Ed science w/lab	4
BUSN308	Managing Cultural Differences	3	Electives	9
	Electives	6		16
		16		
<u>Fourth Year</u>				
BUSN 403	Business, Government & Society	3	BUSN 466 Business Policy	3
	Electives	6	Electives	10
		6		16
		15		
			Total credits	124

Business Administration General Education and B.S. Degree Requirements

Oral & Written Communication (6 cr. Min.): ENGL110 & either ENGL111 or (COMM101, COMM201, or COMM225)

Mathematics (3 cr. Min.): One course in Mathematics (MATH110 or higher)

Social Science (6 cr. Min.):* BUSN121, ECGE100, ECON201, ECON202, ECON302, GGGE100, GEOG201, GEOG302, HIST101, HIST102, HIST131, HIST132, HSGE100, POLI110, POLI160, PLI241, PSGE100, PSYC101, PSYC155, PYGE100, SOCY101, SOCY102, SOCY113, SOGE100.

Natural Sciences (7 cr. Min., one with lab)*: BIOL104, BIOL105, BIOL122, BIOL131, CHEM108 & CHEM 109, CHEM110, CHEM115, CHEM116, GEOG106, GEOG108, GEOL115, GEOL121, GEOL122, NSGE100, NSCI101, NSCI102, NSCI103 & NSCI104, NSCI110, NSCI116, NSCI119, PHYS221, PHYS231.

Humanities (6 cr. Min.):* ARTS250, ARTS251, ENGL180 (eff. Summer 2015), HUGE100, HUMN203, HUMN240, HUMN251, HUMN252, HUMN255, MUSC220, MUSC221, PHIL302, PHIL305. A second year (6-8 credits) of foreign language may be used as one course.

Oral & Written Communication (3 cr. Min.): One additional course in ENGL (ENGL111) or COMM (COMM101, COMM201 or COMM225) to total at least one year of composition and one semester of communication.

Cultural Diversity (3 cr. Min.): BUSN308, EDUC250, ENGL235 (eff. Summer 2015), ENGL236 (eff. Summer 2015), GEOG306, HIST203, HLTH328, POLI234, POLI334, SDGE100, SOCY103, SOCY213, SOCY225, SOCY321.

*from 2 different disciplines or 2 interdisciplinary

Revised 06/2016

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Curriculum Map
This documentation is relevant to Question number:	Part 2 – Business Administration Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The document shows how the program's courses address the program's learning outcomes.

**Bachelor of Science: Business Administration BS
Program Learning Objectives**

L=Low, M=Medium, H=High

Learning Objectives: Students will	BUSN 121	BUSN 211	BUSN 231	BUSN 308	BUSN 350	BUSN 403	BUSN 466
Be able to demonstrate basic knowledge about many aspects of business practice.	L				M	M	H
Be able to apply appropriate statistical techniques to business problems to support data-driven management decision-making.		M					M
Be able to demonstrate effective oral and written communication skills in a business environment.	L		M	M	H	H	H
Be able to work effectively with team members from diverse backgrounds to achieve business objectives.	M		M	M		M	M
Be able to understand and effectively communicate basic principles of law that apply to business transactions.					H		
Be able to apply critical thinking skills to major factors that affect the business environment including government regulations, the media and the political environment, the economy and societal issues.					M	H	M
Be able to apply critical-thinking skills to evaluate opportunities and solve problems in a business environment.		M		M	M		H
Be able to demonstrate knowledge of the functional areas of business and how these areas are integrated.	L	M	M	M	H	H	H

PART 2: Degree-Level Review

Degree Program: Bachelor of Science – Business Administration - Entrepreneurship

Explain how the program works to address each of the following questions. For each question, respond with a narrative and supporting evidence.

Assessment (CC 4.B and CC 4.C)

13. Provide evidence that the degree-level program outcomes are clearly stated and are effectively assessed, including the "use of results." Attach the 4-Column Program Assessment Report.

A report is attached that details the assessment criteria, assessment results and use of results for the Entrepreneurship program's student learning outcomes for the 2016/2017 and 2017/2018 academic years.

Program Enrollment:

The table below illustrates the enrollment growth in the Entrepreneurship program has been exceptional since 2009. The program has grown by 15 while the enrollment in LSB and LSSU has fallen by 95 and 614 respectively. The number of LSB students that have chosen Entrepreneurship as their major has increased from less than 1% to almost 7% of LSB students.

Academic Year	Bus. Administration Entrepreneurship	Enrollment LSB	As Percentage of LSB Students	Enrollment LSSU	As Percentage of LSSU Students
2009-2010	0	313	0	2473	0
2010-2011	1	288	0.00347222	2572	1.35E-06
2011-2012	6	304	0.01973684	2572	7.674E-06
2012-2013	8	287	0.02787456	2215	1.258E-05
2013-2014	13	334	0.03892216	2272	1.713E-05
2014-2015	14	307	0.04560261	2177	2.095E-05
2015-2016	10	269	0.03717472	2035	1.827E-05
2016-2017	15	247	0.06072874	1986	3.058E-05
2017-2018	15	218	0.06880734	1859	3.701E-05

Business Plan Development:

During the 2016/2017 academic year students recorded an average of 90% on their business plans. As a result faculty will continue to monitor this outcome for the 2018/2019 academic year and make adjustments if results are not within acceptable guidelines.

As part of the business plan development students are required to develop a business idea, determine sustainability based on market size and create an implementation plan to get the business operational. Through this exercise students learn how to analyze and synthesize market data, develop financial information and draw conclusions based on their analysis. LSB faculty are invited to view the business plan presentations at the end of the semester.

Motivate and Retain Workers:

A component of the business plan requires students to develop a "team" of top executives that will assist in the operation of their company. This includes developing job descriptions, core competencies required and educational desired backgrounds of each position. Students are asked to also create a compensation plan that will retain key executives. This may include equity positions, performance bonuses or stock options.

As an assessment tool, entrepreneurship students must obtain a score of at least 75% on the management section of Business 466. During the 2017-2018 academic year the entrepreneurship student scored 92% for the management section. As a result of the goal being attained, faculty will continue to monitor results and adjust accordingly.

Development and Presentation of Pitch Deck:

A component of the business plan development for Marketing 389 is the development and presentation of a power point "pitch deck" to potential investors. This presentation allows the student to explain their business idea, introduce their management team, explain how it will make a profit and ask for an investment.

During the 2016-2017 academic year it was noted that students were not awarded a numerical mark on the presentation portion of their pitch deck. As a result, the class of F2018 will receive a numerical grade on the presentation portion of the deck with an assessment criteria of 80% of the students achieving a score of 75% or better.

Development of Pro Forma Financial Statements:

A component of the business plan developed for Marketing 389 is the development of pro forma income statement and balance sheet. Prior to 2018-2019 students were required to develop three years worth of statements. Starting with the F2018 semester students will be required to produce three years of statements under a poor, normal and good scenario. Although the assessment criteria was met for the F2016 semester, faculty decided that the addition of the three scenarios would be more realistic. The assessment criteria will remain the same.

Business Knowledge:

The major field test completed by graduating students each semester is the assessment criteria used for business knowledge. The goal is for LSB to meet or exceed the national average in each area of study on the major field test. Since 2016, LSB has met this goal in two of the four semesters. It was decided that the LSB students were below national average in the quantitative areas. As a result a new management professor with exceptional quantitative and teaching skills has been hired is expected to make an impact in these areas. The table below illustrates the impact that this has had on the quantitative business analysis abilities of LSB students relative to national averages.

	S16	F16	S17	F17	S18
LSSU	41	46	32	36	33
NATIONAL	36.4	34.1	34.1	34	34

Professional Skills:

The business plan project completed as a part of the capstone class (BUSN 466) requires all students to acquire and illustrate professional skills in the areas of research, analytics and communication. The goal is for 80 % of LSB students to achieve a minimum of 80% on this project. The assessment data is provided below. Prior to the F2016 semester students were below the criteria threshold and the faculty responded by improved mentorship during the process and the development of a detailed grading rubric to assist students.

	F2016	S2017	F2017	S2018
Percent of Students greater than 80%	80	100	100	95

14. Explain how results from degree assessments were used to improve the degree program. Include specific examples.

During the fall semester of 2018, more faculty have become involved in the mentoring of students enrolled in BUSN 466, the capstone, business plan class. Students sought mentorship from other faculty members for assistance in the development of the business plan. The business plans were also discussed at various bi- weekly school meetings at which time input into improvement in the plans was solicited.

As a result of the poor performance of LSB students on the MFT, a new faculty member with excellent quantitative skills was hired to teach the quantitative management classes. This faculty member has adjusted teaching styles to incorporate more examples during class time. Since this time we have seen a demonstrated improvement on the quantitative section of the MFT by LSB students.

Faulty teaching Marketing 389 (Entrepreneurship) has become a certified "Wendy Kennedy Entrepreneurship Coach". This professional development has allowed faculty to implement new learning tools during the idea development phase of the business plan. This has limited the desire for students to alter their business ideas mid semester once the market analysis has been done.

Quality, Resources and Support (CC 3.A)

15. Explain how the program ensures that degree program-level and course-level learning outcomes are at an appropriate level. Attach evidence, including a degree audit for the program.

The Lukenda School of business has been accredited by "The Accreditation Council for Business Schools and Programs. ACBSP's accreditation process follows the Baldrige model. The accreditation focuses on recognizing teaching excellence, determining student learning outcomes, and a continuous improvement model. ACBSP's student-centered teaching and learning approach, which is measured and analyzed for quality, ensures that students gain the right skills from their educational investment. Institutions with programs accredited by ACBSP are committed to continuous improvement that ensures their business program will give students the skills employers want.

Intellectual Inquiry (CC 3.B).

16. Explain what the program does to engage students in collecting, analyzing, and communicating information; mastering modes of inquiry or creative work; developing skills integral to the degree program. Attach examples of undergraduate research, projects, and creative work.

Market Analysis

During the development phases of the business plan required for Marketing 389 students are required to collect information from various sources to determine market size. With this data they are then required to analyze the data to determine the size of their target market.

Pitch Deck

During the presentation phase of the business plan required for Marketing 389 students are required to communicate information regarding their business through the use of a power point presentation to potential investors. This allows the students to develop power point skills as well as public presentation skills.

Category Map

A component of the business plan for Marketing 389 requires students to develop a category map of the existing industry landscape. This requires students to determine trend drivers in the market and position existing competitors into the category map. This exercise forces students to think creatively in determining industry trends and future market growth potential.

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Assessment Report
This documentation is relevant to Question number:	Part 2 – Entrepreneurship Question #13
Briefly summarize the content of the file and its value as evidence supporting program review:	The report provides evidence that the program outcomes are clearly stated and effectively assessed.

Assessment: Program Four Column

Program (CoS) - Business Administration-Entrepreneurship BS

Assessment Contact: Prof. Robert Boston

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>Business Plan Development - Students will develop a sound and viable business plan for a new venture. Goal Status: Active Goal Category: Student Learning Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem., ILO3 - Analysis and Synthesis - Students will organize and synthesize evidence, ideas, or works of imagination to answer an open-ended question, draw a conclusion, achieve a goal, or create a substantial work of art.</p>	<p>Direct - Group project, collaborative learning - Students will achieve a score of 75% on the development of their business plan in Marketing 389 [Entrepreneurship].</p>	<p>Finding Reporting Year: 2017-2018 Goal met: Yes This class was not offered during this period. (08/23/2018)</p>	<p>Use of Result: Will continue to monitor. (08/23/2018)</p>
	<p>Direct - Capstone Project - including undergraduate research - Students are required to complete a business plan for the capstone course BUSN 466 - Business Policy. Criteria Target: 80% of Entrepreneurship majors will score 80% or above on the project. High Impact Program Practices 1: Capstone Course(s), Projects</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes The average score on the business plans was 90%. (08/23/2017)</p>	<p>Use of Result: Will continue to monitor. (08/23/2018)</p>
		<p>Finding Reporting Year: 2017-2018 Goal met: Yes No Entrepreneurship majors took BUSN 466 in this academic year. (08/25/2018)</p>	<p>Use of Result: LSB faculty and staff will review business plan results together at a School meeting each semester during which the instructor can provide feedback on student performance and curriculum adjustments can be discussed.</p> <p>Since the business plan is the capstone course project for all business programs, LSB faculty have concluded they all need to be involved in some capacity. During the fall 2018 semester, LSB faculty will develop a plan to be implemented during the spring 2019 semester when the majority of seniors will take BUSN466. Ideas being considered include</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
			participation in grading the written portion or the presentation portion or mentorship of a group of students. (08/25/2018)
		Finding Reporting Year: 2016-2017 Goal met: Yes 100% of Entrepreneurship majors scored 80% or above. (08/25/2017)	Use of Result: There are no concerns at this time. We will continue to monitor business plan results. (08/25/2018)
Human Resource Development - Students will be able to explain tools to motivate and retain workers in a small firm.	Direct - Group project, collaborative learning - Students will complete the Management section of BUSN 466 Business Policy project.	Finding Reporting Year: 2017-2018 Goal met: Yes Spring: The student achieved a score of 100%. (08/23/2018)	Use of Result: Will continue to monitor results. (08/23/2018)
Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) (Bloom) Institutional Learning: ILO1 - Formal Communication - Students will develop and clearly express complex ideas in written and oral presentations., ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal.	Criteria Target: Students will achieve a score of 75% or better on the Management section. High Impact Program Practices 1: Capstone Course(s), Projects	Finding Reporting Year: 2017-2018 Goal met: Yes Spring: The student achieved a score of 92% (08/23/2018)	Use of Result: Will continue to monitor. (08/23/2018)
Pitch Deck - Students will present a power point presentation to the class. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Level 2 (Skills and Concepts) (Webb) Institutional Learning: ILO1 - Formal Communication - Students will develop and clearly express complex	Students will present their pitch deck successfully in Marketing 389- Entrepreneurship. Criteria Target: 80% of students will successfully complete their pitch deck with a minimum grade of 75%. Schedule/Notes: MRKT 389 is an alternate year course offered in the fall of even years.	Finding Reporting Year: 2016-2017 Goal met: Yes All students successfully presented their pitch deck to the class. (08/23/2018) Finding Reporting Year: 2017-2018 Goal met: Yes This class was not offered during this time period. (08/23/2018)	Use of Result: Will continue to monitor and ensure that all students complete presentation. (08/23/2018) Use of Result: Will continue to monitor results. (08/23/2018)

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>ideas in written and oral presentations.</p> <p>Proforma Financial Statements - Students will develop proforma balance sheet and income statement. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): High-Level (Creating/Evaluating) {Bloom} Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem., ILO3 - Analysis and Synthesis - Students will organize and synthesize evidence, ideas, or works of imagination to answer an open-ended question, draw a conclusion, achieve a goal, or create a substantial work of art.</p>	<p>Students will complete the proforma statement section of the final project in Marketing 389 Entrepreneurship.</p> <p>Criteria Target: Students will achieve a score of 75% on the proforma statement section of the final project in Marketing 389. Schedule/Notes: MRKT 389 is an alternate year course offered in the fall semester of even years.</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes The average score on the proforma statements was 80%. (08/23/2018)</p> <p>Finding Reporting Year: 2017-2018 Goal met: Yes The class was not offered during this period. (08/23/2018)</p>	<p>Use of Result: Will continue to monitor. (08/23/2018)</p> <p>Use of Result: Will continue to monitor when the class is offered in Fall of 2018. (08/23/2018)</p>
<p>Business Knowledge - Graduates will demonstrate knowledge of business-core subjects. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Level 2 (Skills and Concepts) (Webb) Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem.</p>	<p>Direct - Exam/Quiz - Standardized - ETS Major Field Test in Business administered to graduating seniors in BUSN466 (Business Policy) Criteria Target: The Lukenda School of Business mean percent correct will equal or exceed the national mean in each assessment indicator area.</p>	<p>Finding Reporting Year: 2016-2017 Goal met: No Fall 2016: The LSB met its goal in each assessment indicator area. Spring 2017: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas. (08/30/2018)</p>	<p>Use of Result: Significant improvement has been made in the Quantitative Analysis and Information Systems sections since a management professor with a strong quantitative background was hired and courses in information systems and analytics were added to the common professional component of all business bachelor degrees. Goals in these sections were met during the 2016 and 2017 fall semesters. The LSB mean was only slightly below the national mean during the 2017 spring semester.</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
		<p>Finding Reporting Year: 2017-2018 Goal met: No Fall 2017: The LSB met its goal in each assessment indicator area. Spring 2018: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas. (08/30/2018)</p>	<p>(08/30/2018)</p> <p>Use of Result: The LSB faculty member who teaches MGMT280 (Intro to Management Information Systems) and MGMT371 (Operations & Business Analytics) continues to make adjustments to teaching methods and assignments to deepen students' understanding of difficult concepts covered in these courses. Beginning fall 2018, the professor will implement quizzes to encourage students to read the textbook, assign graded homework, require an online subscription to study material and add more sophisticated Excel exercises. Also, she will begin the semester by giving a presentation on how to succeed in quantitative courses. (08/30/2018)</p>
<p>Professional Skills - Graduates will demonstrate skills in research, communications and critical thinking. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom] Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal.</p>	<p>Direct - Capstone Project - Including undergraduate research - Business plan project completed in capstone course (BUSN466-Business Policy) Criteria Target: At least 80% of students will earn 80% or higher</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2016 - 80% of students earned 80% of higher Spring 2017 - 100% of students earned 80% of higher (08/30/2018)</p>	<p>Use of Result: LSB faculty and staff are pleased with the improvement shown, as the LSB fell short of its goal during both the fall 2015 (71%) and spring 2016 (78%) semesters. The instructor of BUSN466 equates the improvement in student performance to the following actions: The instructor spent more time with individual students early in the process to provide guidance and mentorship. The instructor provided the grading rubric with the syllabus which provided an outline of each</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
		<p>Finding Reporting Year: 2017-2018 Goal met: Yes Fall 2017 - 100% of students scored 80% of higher Spring 2018 - 95% of students scored 80% of higher (08/30/2018)</p>	<p>section. The grading rubric also provided LSB faculty with data on which sections students need improvement in that can be tied back to course content. (08/30/2018)</p> <p>Use of Result: LSB faculty and staff will review business plan results together at a School meeting each semester during which the instructor can provide feedback on student performance and curriculum adjustments can be discussed. (08/30/2018)</p>

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Document Title (if attached) or Filename (if emailed):	Degree Audit
This documentation is relevant to Question number:	Part 2 -- Entrepreneurship Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The degree audit lists the program's requirements in terms of courses, credits, residency and GPA.

**B.S. in Business Administration - Entrepreneurship
Degree Audit**

Name _____

A# _____

Intended graduation month/year ____/____

Advisor Approval _____

Degree Requirements

Common Professional Core (48 credits)

ACTG132	4	_____	_____
ACTG133	4	_____	_____
BUSN121	3	_____	_____
BUSN211	3	_____	_____
BUSN231	3	_____	_____
BUSN350	3	_____	_____
BUSN403	3	_____	_____
BUSN466	3	_____	_____
ECON201	3	_____	_____
ECON202	3	_____	_____
FINC341	4	_____	_____
MGMT280	3	_____	_____
MGMT360	3	_____	_____
MGMT371	3	_____	_____
MRKT281	3	_____	_____

Major Requirements (6 credits)

BUSN399	3	_____	_____
MATH111	3	_____	_____

Minimum 21 credits from 3 disciplines:

ACTG334	3	_____	_____
BUSN261	1	_____	_____
INTB389	3	_____	_____
INTB486	3	_____	_____
MGMT365	3	_____	_____
MGMT380	3	_____	_____
MGMT464	3	_____	_____
MGMT476	3	_____	_____
MRKT283	3	_____	_____
MRKT385	3	_____	_____
MRKT387	3	_____	_____
MRKT388	3	_____	_____
MRKT389	3	_____	_____

General Education Requirements

(Minimum 34 credits)

Oral & Written Communication (min. 9 credits)

ENGL110	3	_____	_____
ENGL111	3	_____	_____
COMM101,	3	_____	_____
COMM201 or		_____	_____
COMM225			

Mathematics (minimum 3 credits)

MATH111	3	Satisfied thru major req.
---------	---	---------------------------

Social Science (minimum 6 credits)*

BUSN121	3	Satisfied thru core course
ECON201	3	Satisfied thru core course

Natural Sciences (w/lab) (minimum 7 credits)*

_____	3-4	_____	_____
_____	3-4	_____	_____

Humanities (minimum 6 credits)*

_____	3-4	_____	_____
_____	3-4	_____	_____

Cultural Diversity (minimum 3 credits)

_____	3	_____	_____
-------	---	-------	-------

***2 courses from different disciplines (subjects)**

Free Electives (300/400 level) to reach minimum 124 credits from: BUSN, MRKT, MGMT, ECON, FINC, ACTG, INTB.

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

At least 124 credits

Residency - 30 hours

2.0 GPA

2.0 GPA in dept'l requirements

I certify that all departmental requirements are complete and the departmental grade point average is 2.0 or higher.

X

Department Head, Lukenda School of Business

Bachelors Degree
Fall 2015 General Education Requirements

Oral and Written Communication (6 credits minimum):

ENGL110 and either ENGL111 or (COMM101, COMM201 OR COMM225)

Mathematics (3 credits minimum):

One course in Mathematics (MATH110 or higher)

Social Science (6 credits minimum) Two courses from different disciplines (Subjects) from:

BUSN121, ECGE100, ECON201, ECON202, ECON302, GGGE100, GEOG201, GEOG302, HIST101, HIST102, HIST131, HIST132, HSGE100, POLI110, POLI160, POLI241, PSGE100, PSYC101, PSYC155, PYGE100, SOCY101, SOCY102, SOCY113, SOGE100.

Natural Sciences (7 credits minimum) Two courses from different disciplines (Subjects), one with a lab, from:

BIOL104, BIOL105, BIOL122, BIOL131, CHEM108 AND CHEM109, CHEM110, CHEM115, CHEM116, GEOG106, GEOG108, GEOL115, GEOL121, GEOL122, NSGE100, NSCI101, NSCI102, NSCI103 AND NSCI104, NSCI110, NSCI116, NSCI119, PHYS221, PHYS231.

Humanities (6 credits minimum) Two courses from different disciplines (Subjects) from:

ARTS250, ARTS251, ENGL180 (effective Summer 2015), HUGE100, HUMN203, HUMN240, HUMN251, HUMN252, HUMN255, MUSC220, MUSC221, PHIL302, PHIL305. A second year (6-8 credits) of a foreign language (e.g., SPAN261 and SPAN262) may be used as one course.

Oral and Written Communication (3 credits minimum) One additional course in ENGL (ENGL111) or COMM (COMM101, COMM201 or COMM225) to total at least one year of composition and one semester of communication.

Cultural Diversity (3 credits minimum) from:

BUSN308, EDUC250, ENGL235 (effective Summer 2015), ENGL236 (effective Summer 2015), GEOG306, HIST203, HLTH328, POLI234, POLI334, SDGE100, SOCY103, SOCY213, SOCY225, SOCY321.

PART 2: Degree-Level Review

Degree Program: Business Administration - International Business

Assessment

1. Provide evidence that the degree-level program outcomes are clearly stated and are effectively assessed, including the "use of results." Attach the 4-Column Program Assessment Report.

International courses that are supporting program outcomes are found in the table below.

	INTB 375	INTB 389	INTB 420	INTB 486	INTB 499	ECON 408	BUSN 466
INTB_1	M	H	M	M	M	M	H
INTB_2	L	H	H	M	H	L	M
INTB_3	H	L	L	H	L	L	M
INTB_4	M	M	M	M	L	H	M
INTB_5	L	L	H	M	H	L	M

H – High (Competencies are primary focus of the course)

M – Medium (Competencies are important in the course)

L – Low (Competencies are minimally covered in the course)

INTB 375 International Business Law

INTB 389 Competing in the Global Market Place

INTB 420 Comparative International Management

INTB 486 International Marketing

INTD 499 International Experience

ECON 408 International Economics

BUSN 466 Business Policy

International Business

Major Program Objectives

Last Date Modified: November 8, 2018

Mission Statement

The mission of a Bachelor of Science Degree in Business Administration - International Business is to prepare students with fundamental managerial skills to succeed in a global business environment and to pursue careers in managerial positions in public or private companies and in non-profit organizations.

#	Intended Outcomes and Objectives	Assessment Criteria and Procedures	Assessment Results	Use of Results
1	Students will demonstrate an understanding of international business knowledge in the areas of Management, Marketing, Economics, and business law.	<p>Indirect – Student Exit Survey</p> <p>Student Exit Survey for International Business Majors – 80% of the students will agree or strongly agree that the objective was reached.</p> <p>Direct - Exam/Quiz - within the course Standardized</p> <p>INTB389 Term Paper Cultural Analysis of a Country: 90% of the students will score proficient and above.</p>	<p>The goal of 80% and above agree and strongly agree was achieved. 100% of the students agreed and strongly agreed.</p> <p>The goal was achieved. We need to continue monitor the results and the tool for assessment as this is a young program and courses are offered on a 2-year rotation.</p>	<p>The results for the Indirect measure needs to be reviewed as the program matures. N=5</p> <p>INTB 389 will be offered every other semester as the course became part of the General Education courses.</p>
2	Students will be able to analyze how cultural, economic, geographical and political paradigms impact ethical issues in various international business decision processes.	<p>Indirect – Student Exit Survey</p> <p>Student Exit Survey for International Business Majors – 80% of the students will agree or strongly agree that the objective was reached.</p>	<p>The goal of 80% and above agree and strongly agree was achieved. 100% of the students agreed and strongly agreed.</p>	<p>The results for the Indirect measure needs to be reviewed as the program matures. N=5</p> <p>This was based upon a low number of students taking the MFAT. We will continue to monitor</p>

		<p>Direct - Exam/Quiz - within the course Standardized</p> <p>Students with IB Major score In in the top 20% in International Business section on the MFAT</p>	<p>Three students took the exam and the average score placed them in the in the top 10% in the MFAT in 2017-18. No student scored below the 10% mark</p>	<p>this outcome In 2018-2019. We had 3 students graduate from the program in academic year 2017-18.</p>
3	<p>Working in teams, use critical thinking to analyze and solve problems and effectively communicate legal issues pertaining to international business law and international business operations.</p>	<p>Indirect – Student Exit Survey</p> <p>Student Exit Survey for International Business Majors – 80% of the students will agree or strongly agree that the objective was reached.</p> <p>Direct - Exam/Quiz - within the course Standardized</p> <p>Shipping Document with terms: 90% of the students will score 80% and above</p>	<p>The goal of 80% and above agree and strongly agree was achieved. 100% of the students agreed and strongly agreed.</p> <p>The goal was achieved.</p> <p>Students had to prepare a Pro Forma Invoice giving a Japanese buyer several options for shipping a product. The Pro Forma Invoice must be created based on Information provided by a Fax from the Japanese Company. The students must Prepare a letter to accompany the pro forma invoice explaining why payment by “cash against documents” would be fair to both parties. Also, the students must determine the cost associated to the</p>	<p>The results for the Indirect measure needs to be reviewed as the program matures, N=5</p> <p>We need to continue monitor the results and the tool for assessment as part of INTB 375 International Business Law courses are offered on a 2-year rotation.</p>

			transaction and provide pricing for the product	
4	Students will be able to evaluate nature, significance and context of managerial activities as undertaken by leadership in various organizations in International business contexts.	<p>Indirect – Student Exit Survey</p> <p>Student Exit Survey for International Business Majors – 80% of the students will agree or strongly agree that the objective was reached.</p> <p>Direct - Exam/Quiz - within the course Standardized</p> <p>INTB420: Case Study I</p> <p>80% of the students will score proficient and above</p>	<p>The goal of 80% and above agree and strongly agree was achieved. 100% of the students agreed and strongly agreed.</p> <p>The average score was 84% with 87% of the students score 80% and above.</p> <p>Discussion board: The structure of international firm. This is part of INTB 420 International - Case Study - CaskIn v. Stumm Handel GMBH Comparative Management</p>	<p>The results for the Indirect measure needs to be reviewed as the program matures. N=5</p> <p>The goal was achieved. We need to continue monitor the results and the tool for assessment as part of INTB 420 courses are offered on a 2-year rotation</p>
5	Students will be able to function effectively in situations characterized by cultural diversity. This includes awareness of own cultural intelligence and awareness of the cultural intelligence of others.	<p>Indirect – Student Exit Survey</p> <p>Student Exit Survey for International Business Majors – 80% of the students will agree or strongly agree that the objective was reached.</p> <p>Direct - Exam/Quiz - within the course Standardized</p> <p>Cultural IQ Quiz</p> <p>7 point Likert type scale</p> <p>3 categories- Cognitive Cultural IQ (4 questions) - Physical Cultural IQ (4 questions) -</p>	<p>The goal of 80% and above agree and strongly agree was achieved. 100% of the students agreed and strongly agreed.</p> <p>Cultural IQ Quiz - 5 point Likert Type Scale</p> <p>Cognitive = mean = 3.4825</p> <p>Physical = mean = 3.225</p>	<p>The results for the Indirect measure needs to be reviewed as the program matures. N=5</p> <p>The Physical aspect of the Cultural IQ Quiz is not meeting the standard established for the program. Need to meet with administration to create a common international experience for the students. I have been working with LSSU and</p>

Emotional/Motivational Cultural IQ (4 questions)	Emotional = mean = 4.0975	Shaoxing University on an educational experience in China. The goal is to have 7 students go next summer to Shaoxing University. Most of the students come from towns with less than 100,000 population and many of them never left the US.
The average score of all students will be 3.5 and above.		

Internal and external Assessment are used to Inform continuous program improvement.

- Assessments are linked to the program's mission and purpose.
- Lead faculty, school faculty, and administrators review the effectiveness of the assessment system, including student performance in courses and alumni performance in the workforce on a semi-annually.
- Student performance on the MFAT examinations are reviewed semi-annually.
- Summative assessments from the Business Plan and Cultural Analysis capstone projects provide feedback to students and faculty.
- Assessment results are communicated regularly to students and faculty to enable both to improve.

2. Explain how results from degree assessments were used to improve the degree program. Include specific examples.

The International Business program starts to get momentum with a slow start 7 years ago. Last year we had 3 students graduate which was the largest group in the history of the program. The results gathered from program and course assessment are very encouraging but we must continue to monitor the results and assessment tools to establish internal and external validity and reliability of the process.

The international business program uses a student exit survey for international business majors. The survey provides great feedback regarding the program. Almost, all students mentioned their China study abroad experience as valuable and essential to connecting content from the international business courses in the program and the affordability of the experience.

"I really believe the ability to have dialogue with students in other countries more often and to be able to collaborate with them on projects could be a very interesting model and would spark interest in students more as well as opening more doors to networking problem solving and more knowledge of other cultures while in the program. Don't ever get rid of the study abroad program. The mix of both online and classroom classes we're great and really follow with current work Trends with the amount of collaboration done online as well as the needed face-to-face contact."

"The study abroad trip to China was very effective in the learning process and inspired me to continue

with International Business. However, I did not like having to take many of my classes online, I would have preferred to have been able to take more of them in class rather than online (international economics, international business law, International marketing, etc)."

Appendix A – Exit Survey Results

The Cultural IQ Quiz is broken down into 3 sections of Cognitive, Physical and Emotional understanding of Culture. The physical section of the Cultural IQ Quiz didn't meet the standard established for the international business program. Students scored a mean of 3.225 for the physical aspect of the Cultural IQ Quiz. In response to the low score, administration and the lead faculty for the international business program, developed a common international experience for the students. The International business program established a China international study abroad experience. LSSU students travel for 6 weeks to take language and business courses at Shaoxing University in China. Students receive transfer credits for the language courses and LSSU course credit for the business courses. The business courses are LSSU business courses taught by LSSU faculty at Shaoxing University. Students participating in the study abroad program provided specific feedback about the courses and the benefits of the learning experience. Based on the positive feedback provided by the students and faculty, The Lukenda School of Business made a commitment to offer the study abroad opportunity every summer for students. (Appendix B – Cultural IQ Quiz))

Feedback the lead faculty received from the Lukenda School of Business advisory board regarding course content in the International Business program centered on the use of "real world" problems to solve for students in the International Business program. The advisory board highlighted the employability of students that could demonstrate to solve specific issues and challenges companies face in international business. An ongoing dialog with the advisory board identified 2 projects that were added to the program. One was the Proforma Invoice project in INTB 375 International Business Law and the cultural analysis term paper for INTB 389 Competing in the global marketplace. Both projects are part of the program assessment and provide valuable insight in how students apply theories and concepts to actual situations.

Quality, Resources and Support (CC 3.A)

3. Explain how the program ensures that degree program-level and course-level learning outcomes are at an appropriate level. Attach evidence, including a degree audit for the program.

The Business Administration – International Business program supports the Lukenda School

The Business Administration – International Business program supports the Lukenda School of Business mission to develop students that become economically, socially, and environmentally responsible and provide empowerment for their professional career by providing managerial skills to

students to apply and utilize in domestic and international professional business situations and business environments.

The Bachelor of Science program in International Business was one of six Lukenda School of Business programs to receive initial accreditation by the Accreditation Council for Business Schools and Programs (ACBSP) in November 2014. It also benefits from Lake Superior State University's accreditation by the Higher Learning Commission (HLC). Although not required for certification or licensing purposes by any of its programs, the Lukenda School of Business sought specialized accreditation to focus on the quality of its programs to establish a formal process for ongoing evaluation and improvement. The Lukenda School of Business chose ACBSP because its accreditation process is uniquely focused on teaching excellence and student outcomes.

The International Business Program is appropriate to higher education and uses external and internal measures to assess the quality and level. The Lukenda School of Business is accredited by ACBSP and we use MFAT results to compare graduate student cohort and individual students in business with students from more than 600 other institutions of higher learning.

In providing an International Business program that is current and relevant as to professional expertise, practical relevance, and current skills required in the firms that conduct business transactions across borders, the international program gains valuable insight and current practices from the business advisory board serving the Lukenda School of Business. The advisory board has individuals that not only hold executive positions in international firms but are experts and leaders in their respected industries. Their input and evaluation provide an effective and efficient feedback loop for the course and program level learning outcomes.

The ultimate indicator for the relevance to be appropriate is the success of our students that graduate from the International Business program. Students gained employment in firms and positions directly related to International Business. Students apply their knowledge and use their skills to succeed in their professional careers demonstrates the relevance of the courses and program content. There is a limited number of students that graduated from the international business program and we have found that they are well positioned in gaining employment in the professional space. As some of the students initiated and participated in the internationalization of companies in the mid-west region to map the direction and manage the processes of internationalization. Others took positions in transportation companies in Michigan and Wisconsin and others are in training to take advantage to their academic background to position them in advanced positions in International Business.

Faculty Credentials: All courses offered in the International Business program are taught by academically qualified faculty. Dr. Wilhelms has a Doctor in Business Administration with concentration in International Marketing and a Master in International Business Administration. Dr. Wilhelms published in peer reviewed academic journals and provides consulting and community work for firms and organizations to internationalize.

Dr. Wilhelms also has a strong practical background in working as an executive for companies operating and participating in International business for more than 25 years. Please view the attached CV (Appendix C – CV and professional resume), transcript, and executive resume. Dr. Wilhelms is the

degree program lead full-time faculty member and students have access to him at each of the locations where the academic program is offered.

In 2016, LSSU's Curriculum Committee adopted the Webb's Depth of Knowledge (DoK) to create rich environments of learning where all students learn at a high level. The Depth of Knowledge (DoK) categorizes tasks according to the complexity of thinking required to successfully complete them. The four concepts are Level 1: recall and reproduction, Level 2: skills and concepts, Level 3: Strategic Thinking, and Level 4: Extended Thinking. The Lukenda School of Business reviewed the outcomes for each of the international courses in regard to evaluating the course numbering and with the DoK learning levels. We found that INTB 389 Competing in the Global Marketplace was designated as 300 level course but the outcomes didn't support the level of strategic thinking. After the review, it was determined that the course was a 200-level course and the lead faculty prepared and submitted to have the course level changed from a 300 level to a 200-level course.

The Lukenda School of Business provides the sufficient resources to meet the teaching, scholarship, service and advising needs for the International Business program.

Intellectual Inquiry (CC 3.B).

4. Explain what the program does to engage students in collecting, analyzing, and communicating information; mastering modes of inquiry or creative work; developing skills integral to the degree program. Attach examples of undergraduate research, projects, and creative work.

Specialized Knowledge

Students define and explain concepts and structures of International Business used in class, online tools and technology to measure cultural models and complex financial models. Students investigate the sources and rules of international law. The students prepare a cultural analysis report of a country based on current research and techniques in the field of international business. (Appendix D – Cultural Analysis)

Broad and Integrative Knowledge

International Business Law is one of the key frameworks to operate in International Business. Students must prepare a Proforma Invoice based on a fax request for a company in Japan. The Proforma Invoice requires research as to best practices, shipping and freight cost and policy, and law to provide a shipping document.

(Appendix E – Proforma Invoice)

Intellectual Skills

One of the requirements for the Bachelor's degree in International Business is an international experience. Internship and/ or Study Abroad are the framework for students to gain this hands on applied learning experience for the students. The Lukenda School of Business develop a

program with Shaoxing University in China where by students travel to Shaoxing University China to take language and business specific courses that are taught by LSSU faculty for 6 weeks.

This is a once in lifetime opportunity for the students to apply cultural and business concepts in a foreign country. Students must interact and conduct research projects with Chinese students to implement specific business strategies related to international business firms. The China Trip challenges students at different levels from generating and facilitating independent and collaborative learning to apply in daily life during their stay in China. Students are exposed to diverse perspectives in the class room, dorms and projects by being immersed into the Chinese culture. Ethical reasoning is stimulated and becomes part of the daily processes while in China as each student must follow Chinese and US law at the same time. Students must use the strictest standard of both laws as a basis for their behavior and actions in China. Students use Geert Hofstede 6-dimension model to quantify culture and identify differences between Chinese and US culture. Then students must translate the differences back to actions and behavior during their stay in Shaoxing, China. The language acquisition during the stay and the daily application of communicating with Chinese students is the first step in communicative fluency.

(Appendix F – Flyer for the China trip)

Applied and Collaborative Learning

There are several opportunities for students to apply their specific knowledge about international business in the classroom. One such opportunity is to research and write an international marketing plan for a product X to be marketed in a country Y. The international marketing plan requires students to link knowledge and skills gained from a number of courses in outlining communications and marketing efforts for a specific product in another country.

(Appendix G – International Marketing Plan)

Civic and Global Learning

Students must define and frame the issue of child labor in a Global context. A case is presented and students must investigate and research the challenges and implications for the host country and country of origin consumers. Law, cultural aspects and consumer preferences must be investigated and analyzed to build a personal position for the issue and recommendations for the case. (Appendix H – Case – Third-World Families at Work)

One of the most controversial areas of the WTO and its member governments has been the relationship between trade and the environment. Students must research, quantify, analyze the

impact on developing countries, and present the issues at hand. The research assignment investigates the relationship between protection of the environment and economic development (Appendix I - Research assignment III)

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	
This documentation is relevant to Question number:	
Briefly summarize the content of the file and its value as evidence supporting program review:	

Appendix Cover Sheet

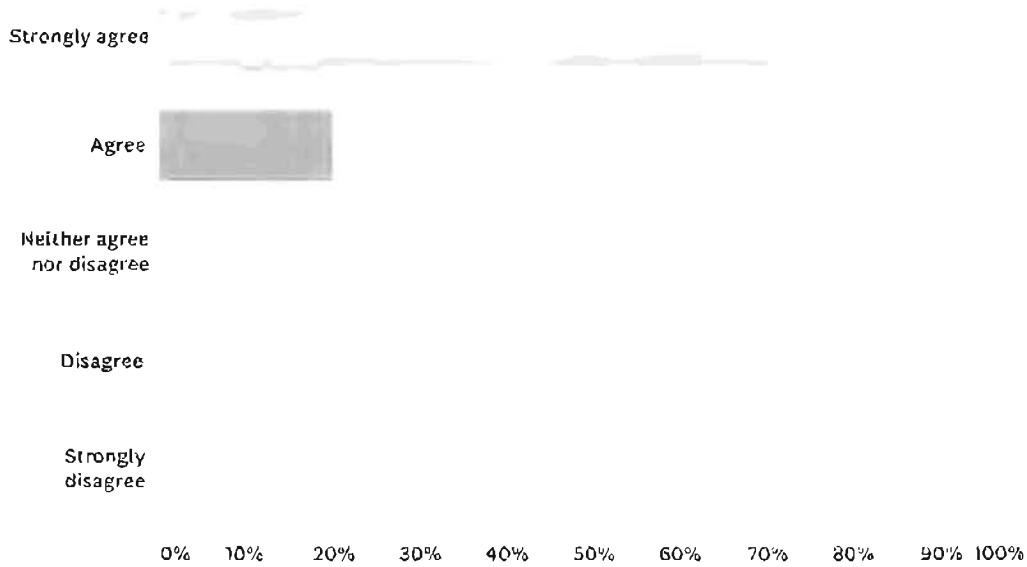
Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	International Business Exit Interview – Appendix A
This documentation is relevant to Question number:	Business Administration – International Business 1. Program Outcomes 2. Degree Assessments
Briefly summarize the content of the file and its value as evidence supporting program review:	1. International Business students were surveyed and it was found that 80% of the students agreed or strongly agreed that the International Business Program Outcomes and Objectives were met. 2. Almost all students mentioned their China Study Abroad experiences as valuable and essential.

Q1 I am able to demonstrate an understanding of international business knowledge in the areas of Management, Marketing, Economics, and business law.

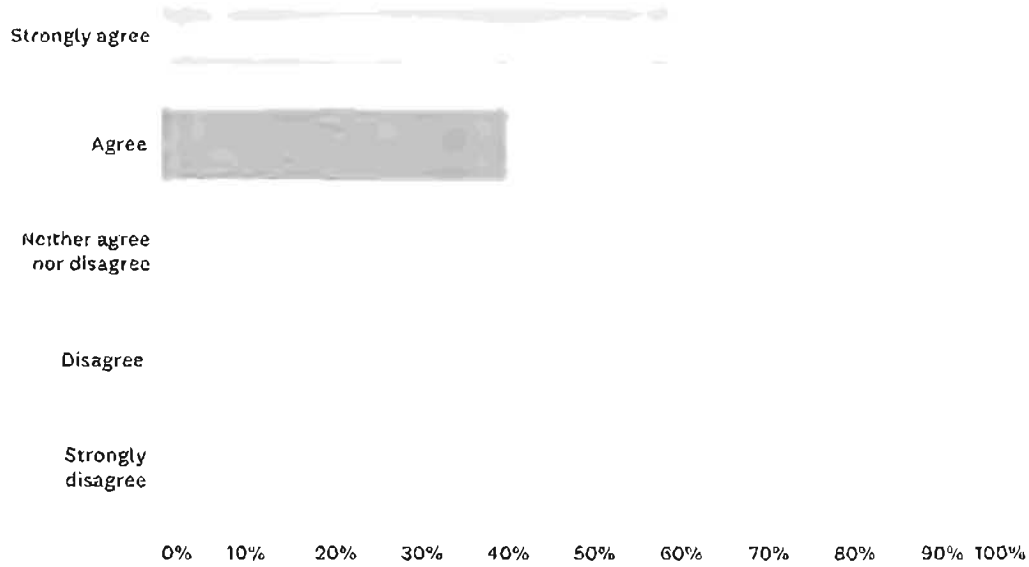
Answered Skipped 0



ANSWER CHOICES	RESPONSES	
Strongly agree	80.00%	4
Agree	20.00%	1
Neither agree nor disagree	0.00%	0
Disagree	0.00%	0
Strongly disagree	0.00%	0
TOTAL		5

Q2 I am able to analyze how cultural, economic, geographical and political paradigms impact ethical issues in various international business decision processes.

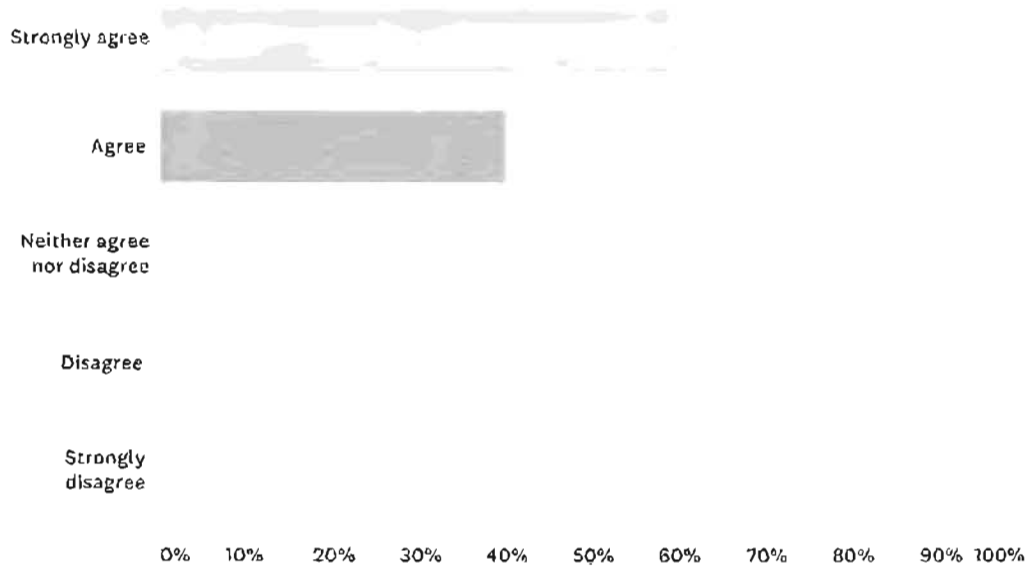
Answered: 5 Skipped:



ANSWER CHOICES	RESPONSES	
Strongly agree	60.00%	3
Agree	40.00%	2
Neither agree nor disagree	0.00%	0
Disagree	0.00%	0
Strongly disagree	0.00%	0
TOTAL		5

Q3 I am able to work in teams, use critical thinking to analyze and solve problems and effectively communicate legal issues pertaining to international business law and international business operations.

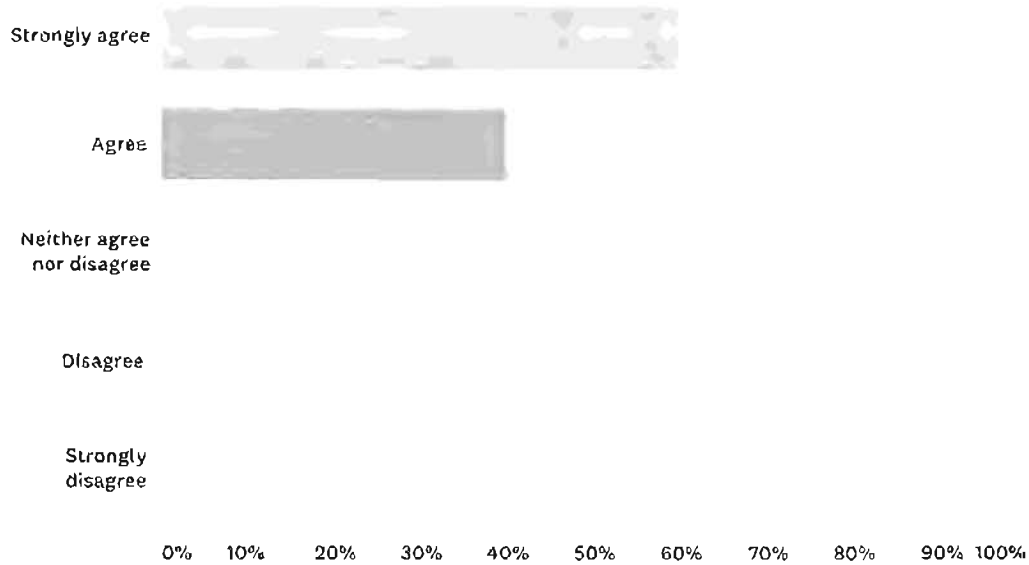
Answered: 5 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	60.00%	3
Agree	40.00%	2
Neither agree nor disagree	0.00%	0
Disagree	0.00%	0
Strongly disagree	0.00%	0
TOTAL		5

Q4 I am able to utilize written and oral communication to effectively analyze and synthesize economic and financial information with an emphasis on international business.

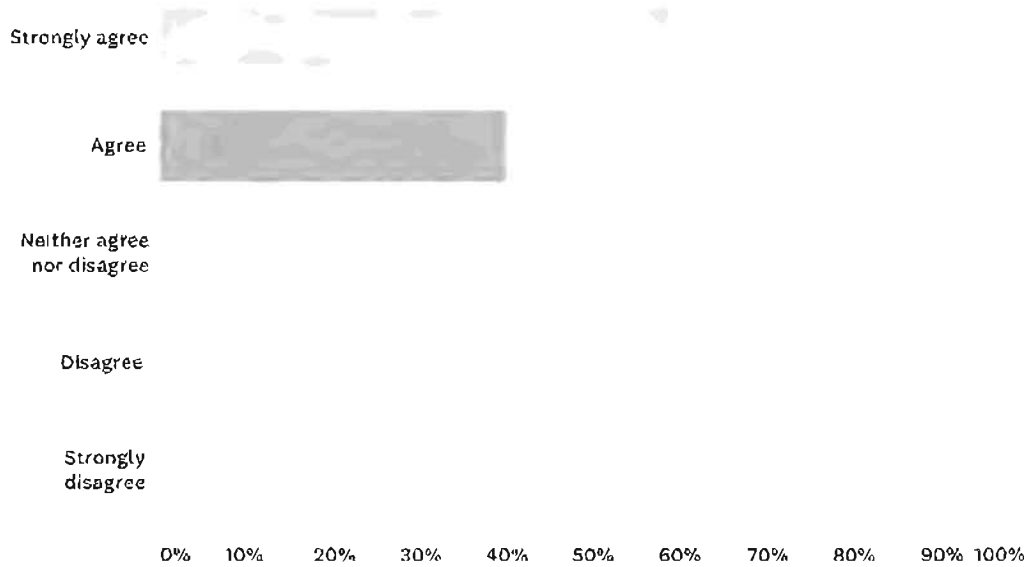
Answered: Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	60.00%	3
Agree	40.00%	2
Neither agree nor disagree	0.00%	0
Disagree	0.00%	0
Strongly disagree	0.00%	0
TOTAL		5

Q5 I am able to evaluate nature, significance and context of managerial activities as undertaken by leadership in various organizations in international business contexts.

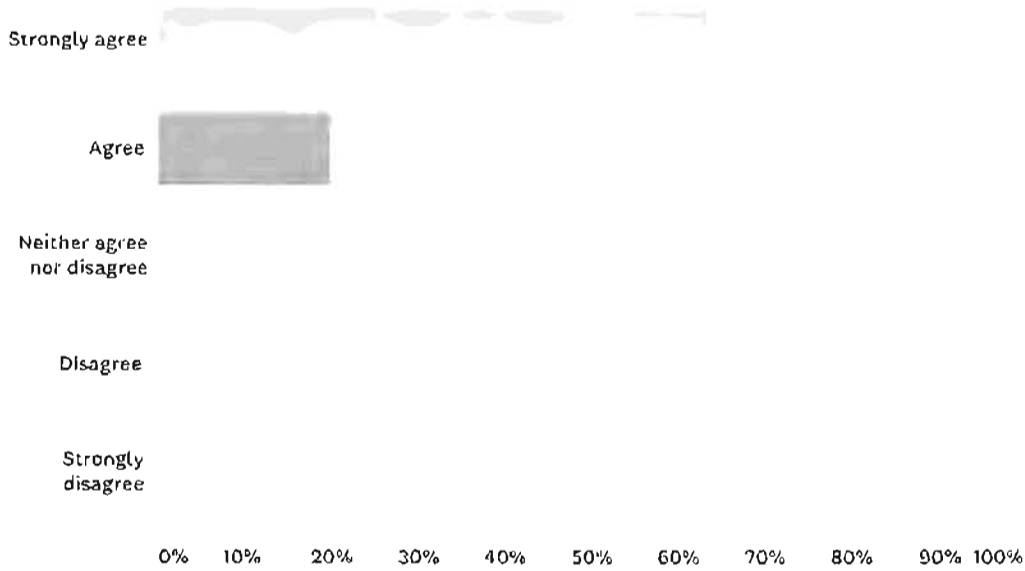
Answered: 5 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	60.00%	3
Agree	40.00%	2
Neither agree nor disagree	0.00%	0
Disagree	0.00%	0
Strongly disagree	0.00%	0
TOTAL		5

Q6 I am able to define, analyze and synthesize concepts in international marketing, culture and communications.

Answered: 5 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	80.00%	4
Agree	20.00%	1
Neither agree nor disagree	0.00%	0
Disagree	0.00%	0
Strongly disagree	0.00%	0
TOTAL		5

Q7 Please list and explain the things you found most/least effective about the International Business Program

Answered: 4 Skipped: 1

Q8 Please list and explain any concrete suggestions for improving your learning in the International Program.

Answered: 4 Skipped: 1

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	International Business Exit Interview – Appendix B
This documentation is relevant to Question number:	Business Administration – International Business 1. Program Outcomes 2. Degree Assessments
Briefly summarize the content of the file and its value as evidence supporting program review:	1. International Business students were surveyed and it was found that 80% of the students agreed or strongly agreed that the International Business Program Outcomes and Objectives were met. 2. Almost all students mentioned their China Study Abroad experiences as valuable and essential.

#1

Collector: Web Link 1 (Web Link)
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 IP Address: 198.110.216.30

Page 1: International Business Exit Survey

- Q1 I am able to demonstrate an understanding of international business knowledge in the areas of Management, Marketing, Economics, and business law **Strongly agree**
- Q2 I am able to analyze how cultural, economic, geographical and political paradigms impact ethical issues in various international business decision processes. **Agree**
- Q3 I am able to work in teams, use critical thinking to analyze and solve problems and effectively communicate legal issues pertaining to international business law and international business operations. **Strongly agree**
- Q4 I am able to utilize written and oral communication to effectively analyze and synthesize economic and financial information with an emphasis on international business. **Agree**
- Q5 I am able to evaluate nature, significance and context of managerial activities as undertaken by leadership in various organizations in international business contexts. **Strongly agree**
- Q6 I am able to define, analyze and synthesize concepts in international marketing, culture and communications. **Strongly agree**
- Q7 Please list and explain the things you found most/least effective about the International Business Program **Respondent skipped this question**
- Q8 Please list and explain any concrete suggestions for improving your learning in the International Program **Respondent skipped this question**

#2



Collector: Web Link 1 (Web Link)
 Started: Friday, July 20, 2018 12:50:11 PM
 Last Modified: Friday, July 20, 2018 1:09:48 PM
 Time Spent: 00:19:36
 IP Address: 75.129.103.201

Page 1 International Business Survey

Q1 I am able to demonstrate an understanding of international business knowledge in the areas of Management, Marketing, Economics, and business law. **Strongly agree**

Q2 I am able to analyze how cultural, economic, geographical and political paradigms impact ethical issues in various international business decision processes. **Strongly agree**

Q3 I am able to work in teams, use critical thinking to analyze and solve problems and effectively communicate legal issues pertaining to international business law and international business operations. **Strongly agree**

Q4 I am able to utilize written and oral communication to effectively analyze and synthesize economic and financial information with an emphasis on international business. **Strongly agree**

Q5 I am able to evaluate nature, significance and context of managerial activities as undertaken by leadership in various organizations in international business contexts. **Strongly agree**

Q6 I am able to define, analyze and synthesize concepts in international marketing, culture and communications. **Strongly agree**

Q7 Please list and explain the things you found most/least effective about the International Business Program

Most effective were the classes with Dr. Wilhelms. They were always filled with energy, critical thinking, real life problems, and group dialogue. Also the study abroad was very eye opening.

Least effective things in the international program were not having as many students from different backgrounds in the classrooms. Most are from the same country, state even, or just across the river.

Q8 Please list and explain any concrete suggestions for improving your learning in the International Program.

I really believe the ability to have dialogue with students in other countries more often and to be able to collaborate with them on projects could be a very interesting model and would spark interest in students more as well as opening more doors to networking problem solving and more knowledge of other cultures while in the program. Don't ever get rid of the study abroad program. The mix of both online and classroom classes we're great and really follow with current work Trends with the amount of collaboration done online as well as the kneaded face-to-face contact. In my opinion this program was one of the best programs at the school when I went through it and it was just getting started. The school needs more enrollment to fix any problem. If we can't ask students to do marketing and recruiting for the school that might help fix two problems.

#3



Collector: Web Link 1 (Web Link)
 Started: Friday, July 20, 2018 4:59:30 PM
 Last Modified: Friday, July 20, 2018 5:08:11 PM
 Time Spent: 00:08:41
 IP Address: 99.203.0.86

Page 1 International Business Exit Survey

Q1 I am able to demonstrate an understanding of international business knowledge in the areas of Management, Marketing, Economics, and business law **Agree**

Q2 I am able to analyze how cultural, economic, geographical and political paradigms impact ethical issues in various international business decision processes. **Agree**

Q3 I am able to work in teams, use critical thinking to analyze and solve problems and effectively communicate legal issues pertaining to international business law and international business operations. **Agree**

Q4 I am able to utilize written and oral communication to effectively analyze and synthesize economic and financial information with an emphasis on international business. **Strongly agree**

Q5 I am able to evaluate nature, significance and context of managerial activities as undertaken by leadership in various organizations in international business contexts **Agree**

Q6 I am able to define, analyze and synthesize concepts in international marketing, culture and communications. **Agree**

Q7 Please list and explain the things you found most/least effective about the International Business Program

The study abroad trip to China was very effective in the learning process and inspired me to continue with International Business. However, I did not like having to take many of my classes online, I would have preferred to have been able to take more of them in class rather than online (international economics, international business law, international marketing, etc).

Q8 Please list and explain any concrete suggestions for improving your learning in the International Program

More in class sessions, less online classes.

#4

Collector: Web Link 1 (Web Link)
 Started: Friday, July 20, 2018 6:25:17 PM
 Last Modified: Friday, July 20, 2018 6:31:12 PM
 Time Spent: 00:05:55
 IP Address: 107.77.194.127

Page 1: International Business Exit Survey

Q1 I am able to demonstrate an understanding of international business knowledge in the areas of Management, Marketing, Economics, and business law. **Strongly agree**

Q2 I am able to analyze how cultural, economic, geographical and political paradigms impact ethical issues in various international business decision processes. **Strongly agree**

Q3 I am able to work in teams, use critical thinking to analyze and solve problems and effectively communicate legal issues pertaining to international business law and international business operations. **Agree**

Q4 I am able to utilize written and oral communication to effectively analyze and synthesize economic and financial information with an emphasis on international business. **Strongly agree**

Q5 I am able to evaluate nature, significance and context of managerial activities as undertaken by leadership in various organizations in international business contexts. **Strongly agree**

Q6 I am able to define, analyze and synthesize concepts in international marketing, culture and communications. **Strongly agree**

Q7 Please list and explain the things you found most/least effective about the International Business Program

Most effective: Ability to understand management techniques for multinational corporations.

Least effective: Despite having a working knowledge of international strategies, I have little knowledge of graphic design to be able to bring those ideas to light.

Q8 Please list and explain any concrete suggestions for improving your learning in the International Program.

Any form of computer science as a minor to supplement international business rather than marketing or include graphic design as part of the requirements for a marketing minor.

#5



Collector: Web Link 1 (Web Link)
 Started: Thursday, July 26, 2018 1:02:31 PM
 Last Modified: Thursday, July 26, 2018 1:08:41 PM
 Time Spent: 00:06:10
 IP Address: 166.216.159.25

Page 1: International Business Exit Survey

Q1 I am able to demonstrate an understanding of international business knowledge in the areas of Management, Marketing, Economics, and business law. **Strongly agree**

Q2 I am able to analyze how cultural, economic, geographical and political paradigms impact ethical issues in various international business decision processes. **Strongly agree**

Q3 I am able to work in teams, use critical thinking to analyze and solve problems and effectively communicate legal issues pertaining to international business law and international business operations. **Strongly agree**

Q4 I am able to utilize written and oral communication to effectively analyze and synthesize economic and financial information with an emphasis on international business. **Agree**

Q5 I am able to evaluate nature, significance and context of managerial activities as undertaken by leadership in various organizations in international business contexts. **Agree**

Q6 I am able to define, analyze and synthesize concepts in international marketing, culture and communications. **Strongly agree**

Q7 Please list and explain the things you found most/least effective about the International Business Program

I find the understanding of different cultural aspects of other countries to be the most effective in understanding of business of other countries. International marketing I found to be the most difficult to understand and effectively apply into practice.

Q8 Please list and explain any concrete suggestions for improving your learning in the International Program.

Country focus: I would find a more specific country or region focus to be more effective than looking at multiple countries or regions.

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Faculty Credentials – Appendix C
This documentation is relevant to Question number:	Business Administration – International Business 3. Program ensures that degree-level and course-level learning outcomes are at appropriate level.
Briefly summarize the content of the file and its value as evidence supporting program review:	All courses offered in the International Business program are taught by academically qualified faculty.



Education

Doctor of Business Administration – International Marketing 2008
Alliant International University, San Diego, CA

Dissertation: Motivational Factors in Consumer Decisions to Participate in Soccer Lotteries: An International Marketing Study

Master of International Business Administration 1991
United States International University
Current Alliant International University, San Diego, CA

Academic Employment

- Professor, Strategic Management and International Business
Lake Superior State University, Michigan 2009 – present
- Visiting Professor, International Business and Marketing,
Shaoxing University, Zhejiang, China Summer Courses 2013 – present

Research Interest

- International Business and Marketing • Strategic Management • Economic Development

Publications

Books



(2017) Ralf Wilhelms and Shengxia Li. Strategic Management: For Managers and Entrepreneurs. E-Strategy Net, United States ISBN 978-0-692-90277-6



(2016) Ralf Wilhelms and Shengxia Li. Strategic Management: Integrated and Practical Approach. Whubam University Press, China ISBN

Referenced Journals Articles

- (2017) The Virtuous Learning Cycle as the Source for Business Models, The paper was submitted to the Strategic Management Journal and is under review, Chicago, Under Review
- (2015) International Markets for Diverse Regional Manufacturing Cluster, International Journal of Business, Marketing, and Decision Sciences, Volume 8, Number 1, p22-32
- (2014) Social Benefits as Part of the Economic Evaluation of High Speed Rail, International Journal of Business and Economics Perspectives, Volume 9, Number 1, ISSN 1931-907

- (2012) Cultural layers: A Practical Approach for International Marketing, International Journal of Business Research, Academy of International Business and Economics 12(5).
- (2012) The Power of Compliments: Generating Positive Behavior Changes in Freshmen Students, ACBSP Annual Edition: Managing Business Education in the New Fiscal Reality, Volume 3. Overland Park, Kansas: Accreditation Council for Business Schools and Programs.
- (2010) Additive and Subtractive Differentiation Strategy, International Academy of Business Disciplines, 17(2).
- (2009) How we communicate about cultures: A Review of Systems for Classifying Cultures, and proposed Model for Standardization, Competitiveness Review, Emerald Publishing 19(2).
- (2009) Motivational factors in consumer decisions to participate in soccer lotteries: An international marketing study, ProQuest, Ann Arbor, ISBN 9780549886419

Working Papers

- **Resource Orchestration and Tactics to build Capabilities.** The paper provides insight to the relationship and the dynamics of the Resources and Tactics in creating Capabilities in a firm. Healthcare Industry (in Progress)

Conference Presentations

- (2016). The Virtuous Cycle: Using Strategy Resources and Tactics to create successful Business Models. SMS Special Conference, Hong Kong
- (2013). Geographic Clusters to Rural Economic Growth Initiative. Innovative Michigan Summit.
- (2012). Practical approach to International Marketing. Annual Academy of International Business and Economics Conference, Las Vegas, NV,
- (2010). A Viability study of the French Luxury Fashion Industry. Global Marketing Conference, Tokyo.
- (2010). Strategy a Global Perspective, International Academy of Business Disciplines, Differentiation, Las Vegas, NV.
- (2009), Global Entrepreneurship, International Leadership for Tomorrow, 8th Annual Leadership Conference, San Diego, CA
- (2006), Cultural Influences in Management, USIU International Business Conference, Paris, France.

Professional Memberships

- SMS – Strategic Management Society
- Foundation of Global Education and Research

University Service

- Faculty Executive Committee 2015 - Present
- Curriculum Committee 2011 - 2017
- MBA - Program and Course Development Committee 2013 – 2016
- University Shared Governance Oversight Committee 2015 - 2016
- Chair of LSB Assessment Committee 2012 - 2014
- General Education Committee 2009 – 2011

Community Involvement/Outreach

CCECD – Chippewa County Economic Development Corporation (2014 – present)
Executive Board

Chippewa County International Airport (2014 – present)
Board Member

EUP Regional Planning & Development Commission (2011 – present)
Michigan State University, and Lake Superior State University International Business Program
Develop Bi National Multi Portals Global Transportation initiative for Eastern Upper Peninsula.

Business and Strategy Consulting (2009 – present)
Provide consulting services in the areas of Strategic Planning and Management as well as Business Operations for domestic and international companies.

Export Resource and Expert Network (EREN) (2011 – 2014)
Regional Exporting Strategies
Develop strategies to initiate and increase export for companies in Northern Michigan and Eastern UP.

UPEDA Bi-National Conference on Collaboration (2012 – 2014)
Organizing Committee
Bi-National Conference at Lake Superior State University on Alternative energy, Multi-Modal Transportation and Higher Education - Upper Peninsula Economic Development Association

Sault Ste. Marie Economic Development Center (2012 – 2014)
Collaborate in the development of the Free Trade Zone in Sault Ste. Marie, Michigan.

Honors

Nominated for Academic Advisor of the Year – 2010, 2012, 2013 2002 – 2005

Nominated for Distinguished Teacher of the Year – 2012, 2016

Professional Growth Activities

- Introduction to Big Data for Social Scientists. Saga Publishing. Online course on how big data impacts marketing and understanding of the ethical issues associated with big data research. September 14th, 2018.
- Student Assessment for Online Learning (2107). Successfully completed the eight-week course focusing on issues surrounding student assessment in online courses. The course was offered by the 'global partner' with the Illinois Online Network (ION).
- Webinar - Exporting Assistance Website, June 26th, 2013, MSU EDA University Center for Regional Economic Innovation, Michigan – Presenter.
- Innovative Practices in Regional Exporting/FDI Attraction Strategies, June 29, 2012, Michigan State University, Michigan - Presenter.
- 23rd Annual CCIS Conference, College Consortium for International Studies, March 28-30, 2012, Washington DC.
- MAP-Works: Improving Student Success and Retention, Webinar 2011
- Accreditation Council for Business Schools and Programs “ACBSP”. Seminar Series, Maintenance of ACBSP Accreditation, October 5-6, 2011, Dayton, Ohio.
- Accreditation Council for Business Schools and Programs Conference. Region 4, Dayton, Ohio.

Ralf Wilhelms, DBA

408 S. Ravine • Sault Ste. Marie, MI 49783
Phone: 619-227-7457 • E-Mail: rwilhelms13@gmail.com

Senior Executive



VALUE PROPOSITION

Business development pro who consistently meets corporate goals

- Proficient problem solver who created and implemented business plans for startup joint-venture for quick expansion into international markets.
- Agile decision-maker who designs innovative incentive and benefits programs that increase yields and reduce costs.

High-profile executive expanding the firms reach

- Energetic achiever who continuously succeeds in establishing and leading business from inception to fruition and from losing ventures into profitable enterprises.
- Savvy marketer vastly experienced in delivering strong marketing, sales and business development programs.

Entrepreneurial leader who performs well in team environments

- Respected manager with effective team spirited approach
- Accomplished motivator with solid reputation for leveraging company competencies, providing common vision, and creating energetic productive organizations.

Leading dealmaker with expertise in global business protocols

- Solid self-starter with track record for developing business strategies supporting growth in domestic and international markets.
- Astute contributor who reconciles complex contracts with a developed and extensive understanding of international business protocols.

Consensus-builder who forges critical global alliances

- Creative thinker who initiates, structures, and negotiates profitable relationships.
- Exceptional communicator who delivers sophisticated presentations to C-level executives to obtain profitable contracts.
- Innovative branding executive who developed brand campaigns for a number of domestic firms.

Diversely experienced visionary

- Motivated achiever who drives aggressive revenue growth and market expansion by utilizing talent for connecting mission, product and service to untapped niches.
- Key player who leads strategic marketing launches and accelerates corporate management of startups capturing local markets.

AREAS OF EXPERTISE

- Mission, Vision and Strategy
- Executive leadership
- P&I, Management
- Budget and Forecasting
- Strategic Business Planning
- Organization and Operations
- Strategic Alliances and Partnering
- Management
- Leadership Branding
- B2B Prospecting and Closing
- Strategic and Tactical Marketing
- Sales, Brand and Channel
- Advertising and PR
- Cross Cultural Communications
- New Business Development

PROFESSIONAL HISTORY

May 2015 – Present

E-Strategy Net – Business Development and Marketing Consulting

Principal/Senior Consultant

- Own and operate management consulting practice representing key Asian and US-based corporations in publishing, internet, construction, education industry.
 - Provide strategic planning, international business development, marketing, corporate communications, sales and general-manager services to companies.
 - Plan and manage complete engagement cycle – from initial contact with C-level executives, project proposals, fee structuring and negotiations, to service and product deliveries.
-

August 2009 – Present

Lake Superior State University

CCECD – Chippewa County Economic Development Corporation

Executive Board

Chippewa County International Airport

Board Member

Business and Strategy Consulting

Provide consulting services in the areas of Strategic Planning and Management as well as Business Operations for domestic and international companies.

January 2004 – 2008

Game Time LLC – Business Development and Marketing Consulting

Senior Consultant

- Strategy development and implementation
- Carry out research and data collection to support initiatives
- Provide and conduct analysis for operations – Benchmarking
- Management of projects and programs
- Run focus groups and facilitate workshops
- International business development – Europe and North America

Clients List:

- o *Publishing Industry*
 - Auto Trader Magazine - South America/Asia and Europe – Internet based - Concept development – Business Development in Argentina and Mexico
 - Business Locator – North America – Photo Classified Ad Magazine – National subscription based publication – Canada, US

- **Sports Press Inc. - South-West Region – Sports Press – 8 regional subscription based magazines**
- *Sport and Recreational Industry*
 - **Let's Play Sports Inc. - Business Development – North America – Start-up – Growth Strategy – Developed and authored business and financial plan -North America www.Letsplaysooccer.com -**
 - **Baja Futbol Rapido - Business Development – Mexico - Strategic Alliance <http://bajafutbolrapido.com.mx>**
- *E-commerce*
 - **Pick 11, LLC - Business Development -- Internet/Wireless sport lottery interface – Central and North America – Start up Venture**
 - **Restore Classics -Internet Company - Restructure of organizational focus, identifying and implementing of strategies to capture new markets and reposition the company in the online space – Europe, North America. <http://www.restoreclassics.com/>**

August, 2002 – 2004 Brento Corp. - San Diego, CA
Executive Vice President/General Manager

Brento Corp. is an umbrella organization with a large spectrum of companies. I lead the process of corporate change and restructuring of a major league professional sport franchise in Southern California in developing clear defined profit centers and sustainable organizational structures.

Responsibilities

- Execute strategic alliances with none profit organizations and companies
- Negotiated Radio and TV contracts
- Oversaw all financial aspects of the organization
- Established marketing strategies and marketing mix for product placement
- Implemented and structured ticket sales programs and distribution
- Developed sponsorship packages
- Direct PR and Media department
- Recruitment and hired key personnel
- P&L responsibilities
- Brand development

March, 1996 - 2002 Let's Play Sports Inc. - San Diego, CA
Founder/Chief Financial Officer

Let's Play Sports Inc. is the number one owner and operator of Indoor Sports Facilities in the United States. A consolidation of assets and operations from Sports Management Group in to Let's Play Sports Inc. was completed in March of 1996. Today, Let's Play Sports Inc. is the leader in the industry with an asset portfolio of \$ 40 million and annual gross revenues of \$ 8 million. The operations achieved consistent profit margins of above 25%.

Responsibilities

- Ensured compliance with public reporting requirements in IPO of common stock.
- Finance and P&L responsibilities
- Developed annual budgets - Orchestrated budget process
- Developed and authored business and financial plan
- Installed all financial systems. Integrated new acquisitions to existing standards
- Advised CEO on company evaluations and contributed to the strategic planning.

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Cultural Analysis – Appendix D
This documentation is relevant to Question number:	Business Administration – International Business 4. What does the program do to engage students in collecting, analyzing, and communicating information, etc.
Briefly summarize the content of the file and its value as evidence supporting program review:	Sample of student prepared Cultural Analysis.



A Cultural Analysis – Germany



Executive Summary

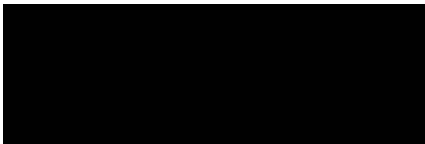
In review of the entire country of Germany from the foods to the customs, it can be concluded that the German culture is one that respects punctuality, schedules, and straight forward communication.

With respect to business, Germans have a sense of pride and are very individualistic. The German government takes the issue of green energy very seriously and therefore has set some expectations and objectives for German business to reduce greenhouse gas emissions. Germany has become a world leader in wind energy. Germans are very innovative and try to create better ways of doing things. Research and development is a big part of most businesses.

The German businessperson has a very distinct line between their personal life and their business life. They are incredibly punctual. If you are not early, you are late. Time is managed meticulously, calendars and schedules must be respected. If you are late to an appointment or meeting it can be considered offensive. If it is an unavoidable delay it is best to contact the person and explain your situation.

German businesses do not commonly participate in gift giving. The businesspeople tend to the business at hand and less on formalities and rituals when travelling for business. Gift giving is more for informal or personal events. If a guest would like to present a gift, it would be best to give company logo pens, liquor, or office equipment.

The German business man generally dresses in dark colored, conservative business suits. They are usually solid colors with a tie and a white shirt. The business woman dress similarly, and it is unprofessional to dress fashionably or adorn oneself with jewels or accessories. Formal and



conservative is the general dress. The country of Germany seems is much like the United States in some regards, such as being individualistic.

The economy is very stable and there are some strict guidelines as to establishing a business in Germany. “Anyone can establish a business in Germany – irrespective of nationality or place of residence. There is no specific investment legislation when setting up a branch office or a new subsidiary in Germany, nor is a minimum percentage of German shareholdings required for foreign entrepreneurs setting up business in Germany.” (Shon & Sellhast, 2014)

Germany overall is a beautiful place with abundant opportunities and should be considered a desirable place to conduct business.

Germany

The History:

“The territory that we now know as Germany was for many centuries a loose collection of independent (and often warring) states, attaining unification after victory in the Franco-Prussian war of 1871. There followed a period of political, military and economic advancement that placed it as a genuine world power. Following defeat in WWI, however, the Treaty of Versailles led to the country being divided once more, this time into East and West Germany.

An economic crisis led to the emergence of the National Socialist German Workers’ (Nazi) Party, making Adolf Hitler head of state. His notorious legacy remains a shocking historical blight. Initial military success in WWII ended in further defeat although this time, the country’s economy recovered more quickly. Reunification took place in October 1990. From 1995 onwards, a new leadership under would-be chancellor Gerhard Schröder emerged to challenge the long-standing Helmut Kohl Christian Democrat (CDU) government.

Schröder came to power in 1998, his reign coming to an end amid confusion following September 2005’s inconclusive election. Germany faced weeks of uncertainty resulting in a deal that saw Angela Merkel sworn in as Germany’s first female chancellor. She has spearheaded European efforts to overcome the economic challenges of the global recession – time alone will judge how successfully”. (The Germany Travel Guide, 2014).

The Flag:



The Arts:

Germany's position in the center of Europe has made the country a crossroads for European ideas, trade, and art. Because they lived in the center of the continent, German artists were influenced by the art of other countries. But the German artists always gave the foreign forms a German look.

Germany contributed to the musical arts significantly with composers such as Hildegard von Bingen, Ludwig van Beethoven, Johan Sebastian Bach, and Wolfgang Amadeus Mozart. (The New Book Of Knowledge, Germany, 2006).

The Land:

"Germany is situated in the very heart of Europe, a small portion of its land borders the North Sea and the Baltic Sea and the countries that share borders are; Poland, Czech Republic, Austria, Switzerland, France, Belgium, Netherlands, and Denmark. Germany can be divided into three very distinct geographical regions – northern lowlands, the central uplands, and the southern mountains" (The New Book Of Knowledge, Germany, 2006). "The different regions offer different types of land, from sloping hills to rivers and forests, to the mountains of the south. The

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Cultural Analysis – Germany

International Business

forests and hills, painted houses, and turreted castles of the region were used as settings for the Grimm brothers' fairy tales" (The New Book Of Knowledge, Germany, 2006). The highest peak in the central uplands is Brocken, rising to 3,747 feet in the Harz Mountains. Southern Germany boasts the Black Forest and the Bavarian Alps. The highest peak in all of Germany is the Zugspitze at 9,718 feet and is located in the Bavarian Alps. Cable cars are a popular mode of transportation to the top of the peak.

The capital and largest city of Germany is Berlin. The country covers 137,846 square miles of land containing 82.6 million people and is divided into sixteen states. The sixteen states are: Baden-Württemberg, Bavaria, Berlin, Brandenburg, Bremen, Hamburg, Hesse, Lower Saxony, Mecklenburg-Western Pomerania, North Rhine-Westphalia, Rhineland-Palatinate, Saarland, Saxony, Saxony-Anhalt, Schleswig-Holstein, and Thuringia.

The Climate:

"Most of Germany has a fairly mild climate. In general terms, it is a temperate country with warm summers and cold winters. Long periods of frost or snow are rare. Rain falls much of the year. The average January temperature is around 38° F and the average July temperature is approximately 72°F. Temperatures vary across the country depending upon altitude and location. Extreme temperatures can be as low as -10°F and as high as 95°F, but these extremes are rare. The mountains remain snowcapped through most of the winter" (The Germany Travel Guide, 2014).

The Language:

“The German Language is spoken by some 120 million people. It is the official language of Germany, Austria, and Liechtenstein and is one of the official languages of Luxembourg and Switzerland. Many of the world’s great works of philosophy, science, and literature were written in German, as well as masterpieces of opera and song.

German is a major language in the family of Germanic languages, which includes Dutch, Scandinavian languages, and English. All Germanic languages belong to a larger family of languages called Indo-European”. (The New Book Of Knowledge, Germany, 2006)

Greetings between people vary, for example two men who are friends would just say hello, but if the two men were not friends but business associates, they would firmly shake hands, make eye contact, and say hello. Women who are friends might kiss one or both cheeks but if they were not friends it would be a brief handshake and make eye contact. When in groups Germans take the time to greet each individual. When men and women greet each other they shake hands unless they are friends, then a hug or kiss on the cheek may be appropriate. (The Culture Crossing Guide, Germany, 2014).

“The German people are generally to the point with their communication, however they keep it polite. There is very little context around their communication. They expect honesty and very much appreciate it.” (The Culture Crossing Guide, Germany, 2014).

The German Family:

Family is of fundamental importance to the German people. Approximately 90% of the population values family as the top of their personal priorities. It is important to all generations, and some say happiness is dependent on having a family.

The definition of family is varied from the traditional family. Traditionally people were married for life, but that is no longer the case. Faithfulness to one's partner is still highly valued, but the norm of staying together has become more relaxed. (Facts About Germany, Society, 2014)

The great majority of Germans live in urban areas. Aside from Berlin, the largest cities are in western Germany. It is the most densely populated part of the country and one of the most densely populated areas in Europe. Whether people live in urban or rural areas, the people of former West Germany generally have a high standard of living. Many families own their own homes and most have automobiles, television sets, and other modern electronic appliances. In part, these Germans live so well because families are small and women often work before and after they have children. Nearly all jobs are open to women and they have full legal equality with men. (The New Book Of Knowledge, Germany, 2006) Approximately 65% of mothers are in employment. There are more instances of single child families than those with three or more children. Two child families are the most widespread. There are also increasing numbers of people living alone or couples with no children. Cohabitation without actually being married is on the rise and has resulted in an increase of illegitimate children being born. Almost a third of the children born are

to unwed mothers. Around one fifth of all households with children are single parents, and as a rule these are single mothers. (Facts About Germany, Society, 2014).

Housing:

“Around half of Germans own their homes, according to the European Union's statistics agency, Eurostat, well below the 71% average in the EU and 65% in the U.S. In Berlin and Frankfurt, these rates are just 16% and 21%, respectively, according to a recent study by the Allensbach Institute and Prognos AG for Germany's Sparda banking association. The study found two-thirds of tenants nationally don't own property, even though they could afford to”. (Torry, 2014).

The price for renting is dependent on the area. According to the Global Property Guide the cheapest rent is in Berlin, as opposed to Frankfurt and Munich. (Global Property Guides, Germany, 2014).

Education:

Education has always been respected in Germany. Famous universities founded at Heidelberg (1386), Leipzig (1409), and Rostock (1419) helped to set standards that were followed by universities all over the world.

Children are required by law to attend school full-time from the age of 6 to 15 or 16 depending on their course of study. After four years of primary school (Grundschule), students go on to one of four kinds of secondary schools. About 60% attend a Hauptschule for another five or six years. This type of school provides a general education. Most Hauptschule graduates attend a

Cultural Analysis – Germany

International Business

vocational school part-time for three years while they learn a trade. Other students, after passing an examination, may attend an intermediate school (Realschule) for six years or a senior high school (Gymnasium) or comprehensive high school for nine years. Realschule graduates usually train for career in business. The Gymnasium prepares students for entrance to a university. (The New Book Of Knowledge, Germany, 2006)

The German people are 99% literate that is, 99% of the people over the age of 15 can read and write. (Central Intelligence Agency, 2014).

Religion:

Most Germans (approx. 60%) identify as Christians. The two main religions are Protestant and Catholic (about 30% each). Those that identify with the Muslim religion are between two and four percent of the population. This leaves approximately 35% of the population that is unaffiliated. “In some cases this is more a financial decision than a religious one. The German government collects a church tax, the so-called *Kirchensteuer*, that supports the Catholic and Protestant churches, as well as some Jewish communities (*Kultussteuer*) in Germany. Many Germans avoid the church tax (9% of a person’s total income tax; 8% in Baden-Württemberg and Bavaria) by legally declaring to the state that they are not a member of any church.” (The German Way, 2014)

Political System:

“The political system of the Federal Republic of Germany represents the second democratic system in German history. At the Parliamentary Council when designing the new constitution, the Basic Law, the founders of the Federal Republic took into account the lessons that had been

Cultural Analysis – Germany
International Business

learned from the failure of the first democracy, namely the Weimar Republic, and the Nazi dictatorship. The Federal Republic of Germany was born from the ashes of World War II. And in 1949 democracy was established only in the Western section of a Germany that had been divided into two states. Yet the Basic Law, although originally intended as a temporary solution, stated that its goal was reunification “in free self-determination”.

The second German democracy turned out to be a success. There were several reasons for this, among which were the value placed on a way of life based on the principle of liberty following the dictatorship and a striving for acceptance by the country’s democratic neighbors. But the Basic Law also had its role to play in the success. In 1990, when 40 years of German division came to an end, the Basic Law was adopted as the constitution of a united Germany”. (Hartman, 2014).

“The Basic Law determines that Germany is a constitutional state: All state authorities are subject to judicial control. Section 1 of the Basic Law is of particular relevance. It stipulates that respect for human dignity is the most important aspect of the constitution: “Human dignity shall be inviolable. To respect and protect it shall be the duty of all state authority.” Among other things, the other basic rights guarantee the freedom to act within the law, equality before the law, freedom of the press and media, freedom of association and protection of the family”. (Hartman, 2014)

“Germany is a parliamentary democracy. The government policy is determined by the head of government and the ministers, and not by the head of state. Given the high standards with regard to the constitutional state and democracy as a result of the Basic Law, the Federal Constitutional Court is a player in the European political arena. The court has illustrated on several occasions that European law must satisfy the criteria of the Basic Law if Germany is to relinquish to the

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EU the rights to draw up its own laws. In this respect to a certain extent the “eternal guarantee” of applicable principles with regard to the Basic Law vie with the Basic Law’s commitment to European integration. In June 2009 in a landmark decision the Federal Constitutional Court stated that the Bundestag must also be substantially involved in European decision making even if it is not called on as a ratification organ for the European treaties”. (Hartman, 2014).

The Current Chancellor is Angela Merkel.

Welfare and Healthcare:

“In the late 1950s that was the goal the then Federal Minister of Economics Ludwig Erhard had in mind when he introduced the social market economy in Germany. The “German model” proved to be a success story and became an archetype for several other countries. One of the pillars of this success was the extensive German welfare system. Today, Germany boasts one of the most comprehensive welfare systems: 26.7 percent of the country’s gross domestic product is channeled into public welfare spending. In comparison, the USA invests 15.9 percent, while the OECD average is 20.7 percent. An all-embracing system of health, pension, accident, long-term care, and unemployment insurance provides protection against the financial consequences of the risks we face in everyday life. In addition, the welfare lifeline offers tax-financed services such as the family services equalization scheme (child benefit, tax concessions) or basic provisions for pensioners and those unable to work. Germany sees itself as a welfare state that considers the social protection of all its citizens to be a priority.

The welfare-state social systems in Germany have a long tradition dating back to the industrial revolution. In the late 19th century, Reich Chancellor Otto von Bismarck devised the principles of the state social insurance scheme; It was under his aegis that the laws relating to accident and

health insurance as well as provisions for invalidity and old age were passed. Whereas in those days a mere ten percent of the population benefited from the welfare legislation, nowadays almost 90 percent of people in Germany enjoy its protection.

In subsequent decades the welfare lifeline was expanded and refined; in 1927, for example, insurance covering the financial consequences of unemployment and, in 1995, long-term care insurance were introduced. The 21st century calls for a fundamental structural realignment to the systems, in particular with regard to whether they can be financed in the long term: The increasing proportion of elderly people in the population in conjunction with a relatively low birth rate and trends in the labor market have pushed the social security system to its very limits. By means of extensive reforms politicians are now busy attempting to meet this challenge and ensure a welfare system based on solidarity for coming generations as well.

Germany is one of the countries with the best medical care. A wide range of hospitals, medical practices and institutions guarantees medical care for everybody. With over four million jobs, health care is the largest employment sector in Germany. All in all, 10.4 percent of the country's gross domestic product is spent on health – 1.5 percent more than the average in the OECD member countries. As a result of the so-called cost-cutting law introduced in the wake of the reform already undertaken to the health system, Germany now makes the lowest per capita increase to health spending of all OECD countries: Between 2000 and 2007 spending rose in real terms by 1.4 percent per annum, while the OECD mean was 3.7 percent.

In 2007 a reform of the healthcare system was passed. Its key pillar is the Health Fund: Since 2009 all the contributions paid by employees and employers to the statutory health insurance scheme flow into this Fund. This is supplemented by tax revenue. Ever since there has been a standardized contribution set by the Federal Government for health insurance. For each insured

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Cultural Analysis – Germany

International Business

person the health insurance companies receive a flat rate from the Health Fund. Companies

which insure a particularly large number of old or sick people and low earners receive a subsidy.

The Federal Government's long-term aim is to enable more autonomy with regard to

contributions and greater regional differentiation. In addition contributions are to be introduced

that are not based on income, but which are to be balanced out through social security payments.

To enable health costs to be almost entirely de-coupled from wage ancillary costs, the

employers' share of the health costs is not to rise any further.

Fundamental changes have also been made to provisions for old age. Although compulsory

pension insurance remains the single most important pillar of income in old age, in-company and

private pension schemes are becoming increasingly important. The so-called "Riester pension"

and the "Rürup pension" for the self-employed are models already in existence, enabling by

means of tax concessions private pension schemes covered by capital contributions. The Owner-

occupied Property Act also encourages residential property. Part of the reform involves raising

the mandatory retirement age from 65 to 67. Between 2012 and 2035 the initial retirement age

will rise by one month a year." (Facts About Germany, Society, 2014)

Business Customs and Practices:

"Attitudes and values are the foundation of every country's culture, and are the building blocks

for developing business culture. Cultural influences, attitudes and behavior vary within and

across nations and within and across ethnicities, and are strongly embedded within communities.

In many respects, Germans can be considered the masters of planning. This is a culture that

prizes forward thinking and knowing what they will be doing at a specific time on a specific day.

The German thought process is extremely thorough, with each aspect of a project being

examined in great detail. Careful planning, in one's business and personal life, provides a sense

Rec... ..
Cultural Analysis – Germany
International Business

of security. Most aspects of German living and working are defined and regulated by structure, for example, through laws, rules, and procedures, which are evident in all economic, political and even social spheres. Rules and regulations allow people to know what is expected so that they can plan their lives accordingly. Germans believe that maintaining clear lines of demarcation between people, places, and things is the surest way to lead a structured and ordered life. In German business culture, this is reflected in the adherence to prescribed business rules resulting in, a low degree of flexibility and spontaneity in attitudes and values.

Germans do not like surprises. Sudden changes in business transactions, even if they may improve the outcome, are unwelcome. Business is viewed as being very serious, and Germans do not appreciate humor in a business context. In addition, counterparts do not need or expect to be complimented.

Work and personal lives are rigidly divided, and Germans subscribe to the ideal that there is a proper time and place for every activity.

When doing business in Germany, it is essential that you appreciate that business etiquette is of great importance to your German counterpart. Germany is a nation that is strongly individualistic, and demands the utmost respect at all times, therefore the highest of standards are expected. Any unethical behavior will seriously diminish all future business negotiations”.

(Passport to Trade. Business Etiquette, 2014)

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Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Proforma Invoice – Appendix E
This documentation is relevant to Question number:	Business Administration – International Business 4. What does the program do to engage students in collecting, analyzing, and communicating information, etc.
Briefly summarize the content of the file and its value as evidence supporting program review:	Sample of student Research Assignment – Proforma Invoice

INTB 375

Ralf Wilhelms

Research Assignment II:

Student First: [REDACTED]

Id #: [REDACTED]

1. *You received a fax transmittal from Japanese buyers you met in New York. They indicate that they would like to place an order of 5,000 down bed pillows. The pillow must contain no less than 85 percent cluster prime white goose down. In order to make the transportation as cost effective as possible, they would like to have pricing for a full ocean container. Before placing the order, they have some questions about the details of the sale.*

Their fax has indicated that although they would prefer to pay for the pillows on open account terms, they would consider your suggestions for payment options. They have indicated that are unwilling to purchase against the documents unless they can first inspect the pillows on their arrival in Japan. They want this right of inspection to find out if the quality is what they had ordered and to look for possible freight damage. They feel strongly about this issue and insist on these conditions, unless you can show them that they can be adequately protected. In addition, they would like to consider the cost of alternative shipping arrangements before they decide whether they want to handle this themselves.

- a) *Prepare a pro forma invoice giving your buyer several options for shipping the pillows. Consider how they will be packed and transported to the closest or best seaport. What facilities are available for handling containerized cargo or for multimodal transport in your region? Utilizing Incoterms, present a breakdown of the shipping alternatives and costs involved in the transaction.*

Down International, Inc
Pro Forma Invoice
New York, New York, U.S.A.

Invoice to: Japanese Homegoods
Tokyo, Japan
Ship/Consign to: as per buyer's instructions
Shipment via: U.S. port to destination Tokyo
Notify Party: Buyer to advise
Country-of-Origin: U.S.A.

Total weight (est.): 9405lbs/4266 kg
Shipping Volume (est): 3000 cu.ft./85 cu.m

Date of invoice: 26 February 2017

Pro forma invoice number: 000235

Terms: Cash Against Documents, irrevocable LC payable in U.S. dollars

Shipment date: 45 days after receipt of LC

Quantity	Item Code	Description	Price	Amount
5000	5WGD-1	Bed pillows of 85% white Goose down, total fill weight 26 oz/.74kg; contents sterilized Shell: 100% cotton, with piping Size 26x26in (66x66 cm)	\$32.00	\$160,000
		PRICE Ex Works, Domestic Packing		\$160,000
		Export packing/vacuum packing		\$850
		Inland freight charge		\$800
		Pier delivery charge		\$150
		Freight forwarder's fees		\$200
		PRICE FAS NY PORT		\$162,450
		Ocean freight charges port to port		\$3,355
		Container rental charge		\$450
		Marine insurance charges		\$640
		Price CIF Port of Tokyo, Japan		\$166,095

Down International Inc.

By, Export Manager

Authorized buyer's signature

All terms of sale interpreted by Incoterms 2010. This quotation is valid for a period of sixty days from above date. Any changes in the actual cost of shipping, handling, packaging, insurance, or other charges not a part of the actual cost of the goods are buyer's responsibility.

The above invoice is one example of a potential option. Sea freight costs would be cheaper when exporting from a city such as Los Angeles or Seattle; however, the increase in land freight costs might negate any savings.

- a) In determining your export price, what other factors must be considered in addition to freight costs? Do you consider additional communication expenses, port fees, trade show expense, forwarder fees, sales agents, and clerical expenses?**

In determining the export price for the 5000 pillows, it is important to consider additional factors that contribute to the cost of shipping. The biggest cost, next to the ocean freight cost, is the cost of transporting the ocean container to the preferential port. While it is the cheapest option to ship from Portland to Tokyo at \$395, driving and fuel costs need to be considered when transporting the pillows from the company warehouse in New York for freight shipment in Portland. If port fees are applicable, they should also be included in the export price.

- b) Prepare a letter to accompany the pro forma invoice explaining why payment by "cash against documents" would be fair to both parties. What can you propose to address their concerns that the goods shipped will conform to their quality specifications? How will they be protected from marine risks?**

Dear Homegoods Japan Authorized Buyer:

Cash against documents is beneficial to both the importer and exporter. Essentially, this method of payment allows for the exporter to receive their money in a timely manner and for importers to receive the goods that were ordered. An important aspect of this payment method is that the importer pays for the shipment before receiving the goods; however, a third party will accept the shipping and title documents for the goods until both the importer and exporter are content with the exchange. So, the Japanese importer would be able to inspect the pillows before transferring payment to the specified financial institution. The importer will also be protected from maritime risks because the exporter retains ownership of the goods until payment is made – the exporter takes on the risk during shipment.

Regards,



Export Manager, Down International, Inc



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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Study Abroad Program Flyer – Appendix F
This documentation is relevant to Question number:	Business Administration – International Business 4. What does the program do to engage students in collecting, analyzing, and communicating information, etc.
Briefly summarize the content of the file and its value as evidence supporting program review:	Study Abroad Flyer for China Trip

SHAOXING CHINA

STUDY ABROAD PROGRAM 2019

DESTINATION:
Shaoxing China

DATES OF PROGRAM:
Summer 2019
May 6 - June 14, 2019

COURSES: - 14 credits:
INTB 375 International Business Law - 3 cr.
INTD 320 International Experience - 3 cr.
CHIN 151 & CHIN 152 Chinese
Language - 8 cr.

PROGRAM FEE:
\$3,685

FEE INCLUDES:
Up to 14 credits, room and board,
round-trip airfare and visa, travel
insurance, tour program fees, on-site
transportation, books.

Not included: \$25 non-refundable
application fee, passport, HTH
mandatory health insurance,
immunizations

**Financial aid available for qualifying
students**

FACULTY LEADER:
Dr. Ralf Wilhelms, MIBA, DBA
International Business

APPLICATION DEADLINE:
January 30, 2019

APPLICATION FORM.
Please make an appointment to
pick up an application in the Study Abroad
Office: Jillena Rose, KJS Library 220
jrose@lssu.edu



DESCRIPTION:

LSSU's Intensive course offerings in China may be the perfect cultural, business and language learning solution for those looking for an immersive and holistic international learning experience.

Shaoxing University was originally founded in 1909 as the Shankuai Primary Normal School and enrolls 13,000 undergraduate students today.

The University is located in Shaoxing, one of the famous historical cities in China. With a history of thousands of years, the region is renowned for the abundant of cultural relics. Numerous accomplished scholars or figures were born or lived here such as Yu the Great in the far ancient China and the famous writer Lu Xun in modern times.

You will participate in a challenging weekly course schedule that can provide you with up to 14 course credits for your current major at LSSU.

Phone: (906) 635-2091 Fax: (906) 635-6669
E-mail: studyabroad@lssu.edu



LAKE SUPERIOR
STATE UNIVERSITY

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	International Marketing Plan – Appendix G
This documentation is relevant to Question number:	Business Administration – International Business 4. What does the program do to engage students in collecting, analyzing, and communicating information, etc.
Briefly summarize the content of the file and its value as evidence supporting program review:	Student prepared International Marketing Plan

COSTA RICA



LSSU Spring Semester 2018
INTB 486 – Professor Philips

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Executive Summary

Thanks to the nutrient-rich coastal waters, snorkeling in Costa Rica can be a magical experience. Full face snorkeling masks will change your snorkeling experience. These masks are designed and manufactured in the United States and have all the features of a full face snorkel mask. For beginners who don't want to get their face wet or have problems breathing through a mouthpiece, they will fall in love with the design. Our target market will consist of the more than 1.7 million tourists that visit the country each year. Majority of the tourists are from the United States and Canada who participate in eco-tourism which includes snorkeling.

Costa Rica's stable government and democratic traditions have made it historically the leader in the region for internal business and tourism. The United States is Costa Rica's largest trading partner with a ratified Central American Free Trade Agreement (CAFTA-DR) in 2009. Costa Rica's proximity to the United States is a major opportunity for a U.S. company such as ours to export our product. Working with local businesses for shelf space will prove to be invaluable. In the preceding pages you will find an outline best suited for our full faced snorkel masks to be successful in the Costa Rican market.

Cultural Analysis

Costa Rica History

Costa Rica was discovered when Christopher Columbus stumbled upon the shores of this Central American country. Costa Rica ratified their constitution in 1949 and compared to the countries in the surrounding areas, Costa Rica is regarded to have a fair judicial system and most stable and most democratic government. The constitution eliminated the country's army, gave women the right to vote and guaranteed its citizens social, economic, and educational benefits.

Costa Rica is and has been a fairly peaceful country that is geared towards making human rights a priority. Costa Ricans pride themselves on having one of the highest literacy rates in the Western Hemisphere (Parker et al., 2018)

Geographical Setting

Costa Rica is a Central American country located south of Nicaragua, north of Panama, and between the Caribbean Sea and the Pacific Ocean. With over 800 miles of combined coastline, Costa Rica is the go-to beach retreat for travelers. Costa Rica, however, is not limited geographically to beaches. Two mountain chains nearly run the entirety of the country. The northern ranges are characterized by volcanic activity while the southern ranges are classified as massive granite batholiths. Costa Rica has been subject to earthquakes and various volcanic eruptions that have destroyed cities and villages. Costa Rica has various climates due in part to the mountain ranges and different elevations. Average temperatures range from 60-80 degrees with warmer areas typically residing in lower altitudes (Parker et al., 2018).

Social Institutions

Family

Families in Costa Rica are very close with many households being multigenerational. Grandparents, parents, and grandchildren usually live together under one roof, but great-grandchildren, cousins, and other close family members can live together as well. Costa Rican children often live at home until they get married as there is no social stigma associated with living at home for adults in their 20's, 30's and even 40's. Families tend to spend a lot of time together and they help with raising the young ones. It is common for a young teenager to help care for infants or even older grandparents. Children are highly valued in Costa Rica. Costa

Ricans love babies and are full of well-intentioned advice regarding every aspect of parenting an infant – sleep routines, appropriate outerwear, first foods, bath time, and more. (Velzer, 2015)

Costa Ricans typically start their families at young ages as most are married by the age of 25. (Rheenen, 2018) However, as more women pursue higher education and out-of-home work, they have also postponed starting families. Educational equality has also led to more women in professional positions and many households now depend on dual incomes, where women increasingly are the breadwinners. The 2000 census revealed that approximately 53% of babies are born to single mothers, but strict laws exist to hold a father financially responsible for his offspring. (Velzer, 2015) When both parents work, and a single parent works, a housekeeper is often hired to take care of the youngest children. Daycare and/or nannies are uncommon as the children tend to go home to grandparents or older siblings.

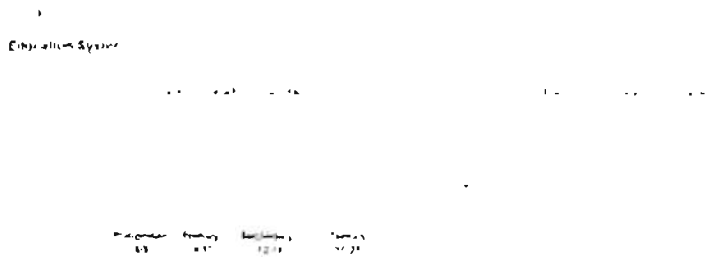
Marriage is the most traditional and common way for Costa Ricans to start a family. Some only consider Catholic Church marriages to be official but civil marriages are also commonplace. Common law marriages also occur when a couple has lived together in a public manner for more than three years. These common law marriages have all the same rights as a Catholic or civil marriage. Men in Costa Rica are expected, to a certain extent, to proposition every eligible woman they meet, and there's still a strong double standard when it comes to fidelity. A man who strays expects to be forgiven by his long-suffering partner; a woman had better not expect the same indulgence. (Rheenen, 2018) Unfortunately, the divorce rate still remains in the 50% range. (Velzer, 2015)

Gender roles in Costa Rica are constantly changing. The culture used to be referred to as a "macho" culture, meaning that the male was dominant. Lately, the roles are becoming more equal and women are starting to take over more professional positions. Women are still expected

to continue to maintain their home as well as take on more responsibilities that require education and work. (Costa Rica, 2014) The balance of equality between men and women is getting close to being the same. Men used to be known as the ones involved in politics but recently women are participating too. Costa Rica's first ever female president was Laura Chinchilla, (2010-2014). Ever since the far-ranging 1990 *Ley sobre la Igualdad Real de la Mujer* (Law for Women's True Equality), that was intended to help close the gap between women's legal rights and their "true" lives, women have been able to become equal to men. (Rheenen, 2018).

Education

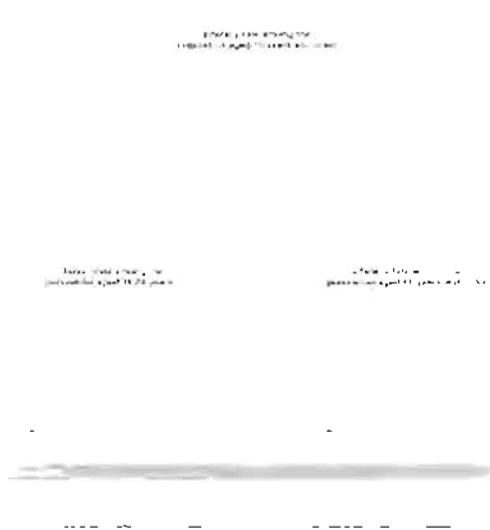
Education in Costa Rica is free and the central government oversees school attendance, curricula, and other educational matters. About one-fourth of the country's budget is allocated to education. The expenditures the nation used to have for arms and their standing army were redirected towards education. This is one of the reasons why Costa Rica has the most advanced and highest quality education system in the region. Every citizen is obligated to receive education by law. Costa Rica's schools have a simple goal: to create a well-educated populace that will one day improve their national (and even global) lot. It's not about individualism and getting ahead. It's about equipping students with the skills to succeed and make real improvements in the lives of the rest of humanity. ("Costa Rica's Education System & Schools in Costa Rica", 2018)



("Costa Rica", 2018)

Primary education is for children ages 6-11 and almost every child in the country is enrolled as it is compulsory. Secondary education is for children ages 12-17. Secondary education is voluntary. During a child's time at secondary school, the first three years are set aside for general education, while the remaining two to three years are for specialized training. Upon completion of high school, students receive a high school diploma that qualifies them for a university. ("Costa Rica's Education System & Schools in Costa Rica", 2018)

Higher education is for ages 17 +. Costa Rica didn't have any universities until 1940, but now there are 4 state-funded universities and over 50 private universities. University of Costa Rica (UCR), currently has approximately 40,000 students, and, despite its youth, it is one of the most prestigious universities in all of Latin America. Its founding marked the government's official recognition of the right to acquire superior education if desired. ("The Value of Education in Costa Rica", 2018) More than nine-tenths of the population over the age of 15 is literate.



("Costa Rica", 2018)

Political systems

Costa Rica is governed by its constitution of November 1949, the 10th in its history. A president, two vice presidents, and a unicameral Legislative Assembly are elected at the same

time for a term of four years, the assembly by proportional representation. Presidents are not allowed to run for immediate reelection. All citizens over age 18 are obliged to register to vote and to participate in elections. Voter turnout has averaged about four-fifths of eligible voters for the past 40 years. ("Costa Rica | Location, Geography, People, Culture, Economy, & History", 2018) There are two dominating parties in Costa Rica; the National Liberation Party (Partido Liberación Nacional; PLN) and the Social Christian Unity Party (Partido Unidad Social Cristiana; PUSC). The PLN is largely responsible for establishing the health, education, and welfare reforms, and the PUSC is more conservative and business-oriented. In 2000, an alternative party was founded, the Citizen Action Party (Partido Acción Ciudadana; PAC). ("Costa Rica | Location, Geography, People, Culture, Economy, & History", 2018)

The Legislative Power is unicameral and it's integrated by 57 deputies elected democratically and simultaneously with the President of the Republic and the Vice presidents for a four-year period as well. The 57 deputies from the Legislative Assembly. ("Government | Costa Rica Embassy", 2018) The Judicial Power is composed by the Supreme Justice Court, the most important judiciary body in the country, as well as the different tribunals responsible for deliver justice. The Supreme Justice Court is composed by 22 magistrates, designated by the Legislative Assembly for eight-year periods. Administratively, Costa Rica is divided into seven provinces which are subdivided into 81 cantons and these, in turn, into 463 districts. The cantons are ruled, with limited capabilities, by a Mayor and a Municipal Council; both the Mayor and the Council are popularly elected. ("Government | Costa Rica Embassy", 2018)

Legal system

Costa Rica's legal system is based on the French Civil code, not the English legal system. In the civil law system, the laws passed by the legislature are ordered into codes which are then

applied by the courts. Only the decisions of the Supreme Court of Costa Rica are binding on the lower courts. The court system is made up of: Lower Courts, Trial Level Courts, Appellate Courts and the Supreme Court. The highest court is the Supreme Court of Justice. Magistrates of the Supreme Court are chosen by the assembly for eight-year terms and automatically continue for a second eight-year term unless removed by a two-thirds vote. An independent Supreme Electoral Tribunal, which has extraordinary powers during elections, oversees the election process. ("Costa Rica Legal, Justice System", 2018)

In Costa Rica's legal system, the jury system is not used. Cases are either decided by a single judge or by a panel of judges. The courts are generally known for their fairness in decisions. There is no capital punishment as it has been banned and sentenced to a penitentiary must be stated by a number of years, so there are no life sentences. Judges don't have much room for interpretations as they must apply the law as strictly as possible, if the crime doesn't fit, they must acquit. ("Costa Rica Legal, Justice System", 2018)

Social organizations

Most of the Costa Rican population can be placed in the middle class. Extreme poverty is not a large problem like it is in other Latin countries, but it does exist. For being a developed country, the Costa Rican incomes are very low. There is also a small poor class and a very elite upper class. The upper class is composed of the traditionally rich families as well as the "nouveau riche" (newly rich) families.

Compared to other Latin American countries, Costa Rica is primarily "white." The ethnic composition of Costa Rica is approximately 66% white/Castizo, 14% Mestizo, 9% immigrants, 7% Mulatto and the rest is a mix of black, Asian, and Amerindian (World Population Review, 2018).

Religion and Aesthetics

Religion is a traditional practice in Costa Rica. Roman Catholicism is the state religion, and Christian values are present in many aspects of daily life. Town names often begin with San or Santa; familiar expressions include "If God wishes it" and "God bless," and every city has at least one Catholic Church. Although the Costa Rican Constitution establishes Catholicism as the state religion, it also assures religious freedom for all. According to recent data, 76.3% of Costa Ricans identify as Catholic. An additional 13.7% are Evangelical Christians, 1.3% are Jehovah's Witness, and 0.7% are Protestant Christian. The remaining 8% either have no religion (3.2%) or are of other faiths (4.8%), including Mormonism, Judaism, and Islam. Only 45% of Catholics describe themselves as practicing, and the rest are essentially Catholic by default – their parents are Catholic, and they themselves were baptized Catholic. Non-practicing Catholics attend Mass only for the high holidays (Christmas and Easter), and for Sacraments like baptism, first communion, confirmation, and marriage. (Velzer, 2017)

Evangelical Christians make up the second largest religious group in Costa Rica. Established Protestant denominations, like Methodist or Presbyterian, not very common in Costa Rica. Evangelical Christianity is a type of Protestantism popular in Costa Rica, it blends philosophies from different denominations to form mostly standalone churches. Mormons are also very vocal so, while their numbers are few, most towns and neighborhoods receive monthly visits from young Mormons dressed in formal clothing, offering to share The Word door-to-door. (Velzer, 2017).

Rather, Costa Rica spends money on supporting social benefits like education and healthcare for its residents. Unfortunately, there are downsides to Costa Rica and that includes poor road conditions and safety. Local drivers in Costa Rica drive dangerously mixed with deteriorating road conditions claims nearly two lives per day in traffic-related accidents. Unless you are retired with a pension, an investor with a substantial portfolio, or planning to open a business in Costa Rica, you may be met with a long painstaking immigration process (Logan, 2018). As far as demographics, life expectancy for men was at 75.9 years as of 2016 and 81.4 for women also in 2016. There are approximately 250 people per square mile populating the entire country of Costa Rica. Nearly 75% of the population lives in urban areas.

As a pastime, many Costa Ricans enjoy football (soccer) or spending time on one of Costa Rica's many beaches or national parks (Parker et al., 2018). TripAdvisor offers insight into many popular activities when in Costa Rica. Day trips to popular beaches, volcanoes, and waterfalls are in the range of \$85-\$146. Playa Manuel Antonio (beach) was rated #1 of 51 things to do in Manuel Antonio. Other interesting activities include white water rafting (from \$69), horseback riding (from \$95), and city tours (from \$50). There are also activities geared towards cruise ship passengers under the category, ports of call tours or shore excursions. Starting at \$55 consumers can take plantation tours, canal tours, beach tours, forest treks, and hikes in national parks. For more excitement you can zip line, prices starting around \$109 for a package ("The 10 Best Things to Do in Costa Rica - 2018 (with Photos) - TripAdvisor", 2018). Many attractions are packaged together to give travelers more bang for their buck. Six in one tour seemed to make a frequent appearance in my search which cost about \$99.

Languages

The primary language spoken in Costa Rica is Spanish, which features characteristics distinct to the country, a form of Central American Spanish. Spanish in Costa Rica is spoken with a distinctive national accent and has some peculiar usages. Costa Ricans replace the diminutive ending *-tito* with *-tico* (hence their nickname). Descendants of Africans in Limón province speak both Spanish and Limonese Creole, which resembles Jamaican English. The principal Indian languages spoken in Costa Rica are part of the Chibchan language family and include Bribri, Cabécar, Maléku Jaíka, Boruca, and Térraba. About 10.7% of Costa Rica's adult population (18 or older) also speaks English, 0.7% French, and 0.3% speaks Portuguese or German as a second language. ("Costa Rica | Location, Geography, People, Culture, Economy, & History", 2018)

The Caribbean coast is the only place in Costa Rica where the main language is English. This is because the population living there are descendants of Jamaica. Due to this fact, many people have a Caribbean accent. There are many people in this area that also speak a dialect that is called Patua. Patua is a mix of English, French, and Spanish. Some people find this language easy to understand, others have more difficulty, but the fact of the matter is that it would be difficult to try and communicate in this language. ("Languages in Costa Rica", 2018).

Geert Hofstede Scores

Geert Hofstede's six cultural dimensions offer a different way to look at and compare cultures. The first one Power Distance. This dimension expresses the attitude towards inequalities amongst one another. The extent to which the less powerful members of institutions and organizations within a country expect and accept that power is distributed unequally. Costa Rica is low on this scale with a score of 35. This means that Costa Rica is focused on equality.

The Costa Ricans, the “Ticos”, are famous for their good human rights record. They are very focused on equality and there is less distance than other countries in the Latin America between blue-collar and white-collar workers. The same is true in the United States where the power distance is at 40, this implies that in the US it is expected that there be more equality between societal levels.

The second dimension is Individualism. Individualism is the degree of interdependence a society maintains among its members. Costa Rica is low on this scale with a score of 15. They find trust, loyalty, personal relations and networking are essential. Family, and especially mothers are very sacred. No hard selling is done in this country. Helping out one another is never forgotten. The United States is very high at 91. This means that they are focused on taking care of themselves and the immediate family rather than belonging to a group.

The third dimension is Masculinity. A low score indicates (feminine) which means that the dominant values in society are caring for others and quality of life. Costa Rica has a score of 21 on this dimension which is on the feminine side. Ticos are very afraid of any kind of personal criticism, they are very high acceptance for women in business. The United States is at a 62 which means they as a society are driven by competition, achievements, and success.

Uncertainty avoidance measures the extent to which the people of the culture feel threatened by unknown situations and have created beliefs and institutions that try to avoid these. Costa Rica score is high for this dimension at 86. They have a strong emotion toward structure and following the rules. Ticos are conservative and don't always embrace strange and different ideas. “Tico time” means a very flexible attitude to timekeeping. The United States is lower in this dimension at 46. This means that the US society has fewer rules and does not attempt to control all outcomes and results.

The next dimension Long-Term Orientation describes how the culture maintains some links with its past to deal with the challenges of the present and future. Costa Rica has no score for this dimension. The United States is low in this score at 26, this means that people in the US tend to have strong ideas about what is “good” and “evil” and view societal change with suspicion.

The final dimension is Indulgence. This measures the extent to which people try to control their desires and impulses. Costa Rica has no score for this dimension. The United States scores a 68. This means they place a high degree of importance on leisure time and are willing to express their impulses and desires with regard to enjoying life and having fun.

Negotiation Style Business Customs and Practices

Costa Ricans or Ticos are very friendly, welcoming, and personal relations are very important to them. Will doing business with them it is best to make regular visits and make appointments in advance. Spanish is the official language, but English is widely spoken. Both English and Spanish versions of business cards and promotional material should be made available. Business attire for meetings consists of a conservative, lightweight business suit and tie for men and a conservative suit or dress for women (Costa Rica, 2018).

Costa Ricans are punctual, but there is nonetheless a relaxed attitude to time; expect delays of up to 30 minutes. The usual form of greeting is a firm handshake: it is not normal to embrace as in other Latin American countries. Business cards are normally exchanged at the start of meetings.

Costa Rican men use their father's family name in introductions, but both their father's and mother's family names in written correspondence. Titles are seen as important, and you should address those with political or professional titles by these only, e.g. Doctor; Abogado

(lawyer). Don't address your Costa Rican contacts by their first names unless invited to do so, but this will often happen fairly quickly (Costa Rica, 2018).

Costa Ricans are honest and open in their communications and will expect the same from others. They are quite conservative, however, and not necessarily very receptive to unconventional ideas.

Business negotiations can be slow as the decision-making is consensual and often involves many different people. There is also a great deal of bureaucracy to be navigated. Note that delays in settling bills and invoices are commonplace in Costa Rica, so payment arrangements should be established in advance. Business dinners are generally held in the evening, and it is expected that spouses will also attend. It is acceptable to give gifts to business contacts, especially if invited to dinner. Appropriate gifts include flowers (but not lilies), wine, whiskey or chocolates (Lang, Lang and Bolaños, 2018).

Economic Analysis

Population and Geography

Costa Rica current population is 4.9 million and is consistently increasing. (Costa Rica Population - Worldometers, 2018). Although the population is on the rise, the yearly growth rate has been on the decline since its highest point in 1964. It is forecasted that in the year 2020 the population will be in about 5 million people. Population density is around 251 people per square mile (Costa Rica Population - Worldometers, 2018). The total land area of Costa Rica is 19,714 square miles consisting of a mix of mountains, craters, beaches, rivers, and waterfalls all spanning no longer or wider than 200 miles smaller than West Virginia. Fourteen major rivers run through Costa Rica produce the world famous whitewater rapids. Costa Rica has both

tropical and subtropical climates as it is part of the Neotropic ecozone. Costa Rica is famous for its microclimates, which are formed by the variations in weather and temperatures throughout the country. Costa Rica means “Rich Coast” and it is clear that this name is appropriate for the country’s never-ending natural beauty.

Demographics

The demographics of Costa Rica is quite mixed according to the most recent census. The ethnic composition of Costa Rica is approximately 66% white/Castizo, 14% Mestizo, 9% immigrants, 7% Mulatto and the rest is a mix of black, Asian, and Amerindian (World Population Review, 2018). According to a recent genome project, the average Costa Rican is 68% European, 29% Amerindian and 3% African. The most common ancestry in Costa Rica is Spanish, although there are many with Italian, German, English, Dutch, Portuguese, Polish and Irish ancestry. The official national language of Costa Rica is Spanish, but the government also recognizes regional languages such as Mekateryu (Limonese Creole English) and Bribri (an indigenous tongue belonging to the Chibchan family). However, English is widely spoken in many tourist areas and hotels and is spoken by close to 10% of the population as a second language. About 82.9% of the population is urban and the median age in Costa Rica is 31.8 years.

Economic statistics

Costa Rica has had stable economic growth since 2010. Main exports consist of bananas, coffee, sugar, and beef. Various industrial and processed agricultural products have broadened exports in recent years, as have high value-added goods, including medical devices (The World Factbook — Central Intelligence Agency, 2018). Foreign investors remain highly attracted by the country’s political stability and relatively high education levels. Costa Rica has attracted one

of the highest levels of foreign direct investment per capita in Latin America mostly because of the incentives offered in the free-trade zones. The CAFTA-DR, (US-Central American-Dominican Republic Free Trade Agreement) came into effect in 2009 and helped increase the foreign direct investments for the economy. ("The World Factbook — Central Intelligence Agency", 2018) Unfortunately, greater investments are hard to come by for Costa Rica because of poor infrastructure, high energy costs, a complex bureaucracy, weak investor protection, and uncertainty of contract enforcement.

The GDP of Costa Rica in 2016 was 57.436 billion which has been on the rise since 1980. ("Costa Rica | Data", 2018) The annual growth rate was 2.98% in Sept. 2017.

Employment and Wealth Distribution

The employment rate at the end of 2017 for Costa Rica was 53.8%, and dropped in January 2018 to 51.7%. This is close to the country's all-time low of 51.16% back in 2011. The average employment rate from 2010 to 2017 was about 55% and at its highest in 2013 it was 57.79%. The average income for an individual in Costa Rica in 2016 was \$22,276 and the national average was \$19,817. (Costa Rica – WID – World Wealth & Income Database, 2018).

Costa Rica is one of the happiest countries in the world, but is seeing an increase in income inequality. Experts at the U.N. Development Program say the growing income gap disproportionately impacts the country's indigenous populations and other minorities.

The Central American country ranks higher than neighboring countries in terms of health and social capita, and its poverty rate has dropped from more than 11 percent in the 1990s to just under 2 percent today, according to World Bank data. (Nikolau, 2018)

In 2016, the country even became the first in the world to sign a National Pact in which Costa Rican society committed to ending poverty and inequality, promote education and health

for all. Sadly, this project has failed to reach the country's poorest. In 2017, the income of the richest 20 percent of Costa Rica's population was 19 times higher than that of the poorest 20 percent. Costa Rica is one of only three Latin American countries that has seen a rise in inequality since 2000. (Nikolau, 2018)

Some experts blame this inequality on an economic model that favors certain sectors of the economy, such as exports and tourism, at the expense of the poor. To close the growing income gap, policymakers should also place more focus on ensuring quality education across all income groups. Costa Rica's Afro-descendant populations report fewer years of school (7.7 years) compared to the national average (8.5 years), for example, while only 10 percent of adults with disabilities hold an educational degree. (Nikolau, 2018)

Transportation and Telecommunication

The major route in Costa Rica is the Inter-Americana Highway which connects many destinations, including San Jose and Guanacaste; Guanacaste and the Central Pacific Coast; and some Central Valley towns west of San Jose (Encyclopedia Britannica, 2018). Elsewhere are narrow, often tortuous, paved routes, with few interconnections, that reach the many valleys and mountain communities. The Northern Pacific Railroad was abandoned in 1991 after suffering severe damage from floods. Port facilities in Limón and Puntarenas are equipped to handle containerized cargo and petroleum shipments (Encyclopedia Britannica, 2018). Juan Santamaría Airport, about 15 miles west of San José, is Costa Rica's main international airport. There is also an international airport in Liberia, a gateway to many Pacific coast beach resorts. Lineas Aereas Costarricenses (LACSA), the Costa Rican national airline, maintains regular service to Central American and Caribbean locations as well as to the United States (Encyclopedia Britannica, 2018). Elsewhere in the country are smaller airports, some with paved and some with gravel

strips, that are used by small planes and offer local service.

Telecommunication services in Costa Rica have a state-owned monopoly since 1949 owned by the Costa Rican Institute of Electricity (Encyclopedia Britannica, 2018). They have some of the highest rates of Internet and cellular phone usage in Central America. Because of the excess demand for cellular phones, paging services have become popular, and there are several in the country. The broadcasting sector also has been privatized (Encyclopedia Britannica, 2018).

Exchange rates

As of February 17, 2018, the exchange rate between the United States Dollar (USD) and the Costa Rican Colon (CRC) was valued at 1 USD to 570.740 CRC. \$100 USD equates to \$57,073.93 CRC ("XE: Convert USD/CRC. United States Dollar to Costa Rica Colon", 2018). It appears that things in Costa Rica are very expensive but that is not the case. If goods in the United States were priced in pennies, a car that costs \$50,000 would be listed as 5,000,000 pennies. This is similar to the situation in Costa Rica. In most parts of Costa Rica tourists typically visit such as hotels and car rentals widely accept USD as an acceptable method of payment and prices are often listed in USD as well ("Good" & "Bad" Exchange Rates", 2018). It is recommended to pay for items listed in colones with Colones and items listed in USD with USD to avoid exchange costs. Tourists are advised to wait until their hotel (only major chains like Hilton or Marriott) or a bank to exchange US Dollars for Colones to take advantage of the best and most fair exchange rates ("Changing Money in Costa Rica - Dollars Accepted", 2018).

Trade restrictions

The Central American Free Trade Agreement (CAFTA-DR) eliminates most of the tariffs on non-agricultural goods that are imported and exported. The United States is Costa Rica's largest trading partner and largest foreign direct investor ("Export.gov - CCG", 2018). The total duty free imports in thousands of US dollars are 10,897,363.50 and duty free tariff line items share is 61.21. On a scale of 1-189 for the ease of doing business, Costa Rica scored a 61. A high ease of doing business ranking means the regulatory environment is more conducive to the starting and operation of a local firm ("Costa Rica Trade at a glance: Most Recent Value", 2018).

Channels of distribution

Costa Rica is located in Southern Central America and the main channels of distribution include: roads, ports, water systems, and air. One of the current challenges faced regarding distribution in Costa Rica is the need for major upgrades in their basic infrastructure. Costa Rica takes advantage of having ports located on both their Eastern and Western coasts allowing businesses to have their products imported or exported within a week. There are direct flights from 15 US cities to both of Costa Rica's international airports which allows many business representatives meet with clients and distributors in Costa Rica in most cases on the same day. Most US companies choose to appoint an agent or distributor in Costa Rica or alternatively partner up locally with another company. ("Export.gov - CCG", 2018).

Mode of Market Entry

Political Instability and Risk

Costa Rica, Moderate Level of Country Risk Tier 4 (CRT-4) has high levels of financial system risk, with moderate levels of economic and political risk (Anon, n.d.). President Luis Guillermo Solís, was elected in 2014 on a platform of improving public governance. Unfortunately, society lost their trust in Costa Rica's government institutions plummeted following the previous government's scandals and corruption allegations. With President Solís in office he has pledged to decrease corruption and focus on improving social services. Also, environmental activism is prominent, which has the potential to curtail foreign direct investment. There have also been protests due to planned public spending cuts and industry privatization. Real gross domestic product (GDP) grew 4.3% in 2016 and is expected to remain stable, at around 4% in the medium term, supported by public investment. Long-term growth will be constrained by rising inequality. Inflation, which was 0% in 2016, is expected to rise to 3% by 2018 (Anon, n.d.).

Mode of Entry Selection

Costa Rica is one of the most stable countries in Latin America. It has an open economy focused on industrial production, services, tourism and agriculture. Our company will be indirectly exporting to Costa Rica and will appoint local representative who will assist us in our initial point of entry into market. These agents will understand local bureaucracy and idiosyncrasies as we export our full face snorkel masks into Costa Rica. We will also hire a legal advisor. Prior to exporting our full face snorkel masks we will follow all government regulations.

Our goal is to sell our product at tourist hot-spots, convenience stores, hotels, and PADI-certified dive shops. With over 800 hotels in Costa Rica we are confident our masks will sell well as most are within walking distance to a beach (Tripadvisor.com, 2018). There are several PADI-certified dive shops that we will work with Snorkeling or Scuba Diving Tour of Cano Island Biological Reserve, Golfo Dulce Dolphin and Snorkeling Tour, Guanacaste Morning or Sunset Cruise and Snorkeling Tour, Catalina Islands Diving or Snorkeling Tour, and Guanacaste Kayaking and Snorkeling Tour (Costa Rica Experts, 2018).

Consumer/Competitive Analysis

Competitive Environment

Although direct competition of traditional face masks with snorkel mouthpiece exists, these types of masks don't provide customers with a full viewing face mask or GoPro attachment capability. Those who don't want to get their face wet or have problems breathing through a mouthpiece will find our masks are ideal. This enables us to distinguish itself in its customers' eyes and differentiate it from the competition.

Company Strengths

Costa Rica provides an abundant amount of nutrient-rich coastal waters where snorkeling can be a magical experience. With more than 1 million tourists visiting the country a year we believe the full faced snorkeling masks will attract more customers to experience snorkeling for the very first time. Also, with the capability of attaching a GoPro to our mask customers can relive their snorkeling experience over and over again.

Definition of Strategic Position

Analysis of these factors outlined leads us to the conclusion that the biggest threat to our plan is the possibility of the cheaper alternative of traditional masks and mouthpieces. It is imperative that we provide retailers we do business with all though pricier than traditional masks ours masks provide customers a whole new snorkeling experience. The uniqueness of the full faced snorkeling mask and GoPro attachment is like no other.

Marketing Plan

Target Market

Our target market will consist of men and women ages 21-50 that are traveling to Costa Rica on vacation. Though we are not restricting family structure in the target market, we are leaning towards a couples retreat over a family vacation.

They would have an average annual income of \$50,000-\$80,000 each. The typical lifestyle that we would expect the target market to have would be an outdoor adventurer type.

Our rationale concludes that typically most hotels and resorts do not allow anyone under the age of 21 to check in unless they have someone that is 21 years or older in their party. Though the snorkeling masks come in a variety of sizes that would fit most age groups, we feel that gearing our marketing efforts towards adults on a couple's retreat since Costa Rica is not somewhere people typically take family vacations to. The average annual income is something that would typically be found in the upper middle class. Costa Rica is a fairly affordable international destination that someone in this income bracket could afford. We are targeting outdoor adventurers because they are active thrill seekers. An average tourist to Costa Rica may

just spend some time sticking their toes in the water on the beach or checking out some shops downtown. Outdoor adventurers would be more likely to purchase the product.

SWOT Analysis

The following SWOT analysis compares the internal strengths and weaknesses of our organization with external opportunities and threats.

Overcome weaknesses to pursue opportunities

<i>Pursue opportunities that fit with strengths</i>	<u>Strengths</u>	<u>Weaknesses</u>	<i>Establish a defensive plan to minimize threats</i>
	<ul style="list-style-type: none"> <input type="checkbox"/> Suitable for geographic area <input type="checkbox"/> Abundant amount of coastline <input type="checkbox"/> Can be accessorized with GoPro attachments <input type="checkbox"/> Hot tourist destination <input type="checkbox"/> Many options to sell <input type="checkbox"/> Low trade barriers 	<ul style="list-style-type: none"> <input type="checkbox"/> Market penetration <input type="checkbox"/> Tourists may not have much use for it after they return home <input type="checkbox"/> May be too expensive for local people <input type="checkbox"/> Brand Loyalty <input type="checkbox"/> Change of consumer preferences 	
	<u>Opportunities</u>	<u>Threats</u>	
	<ul style="list-style-type: none"> <input type="checkbox"/> Sell to retailers for rental purposes <input type="checkbox"/> Bulk orders <input type="checkbox"/> Product differentiation (GoPro attachment) <input type="checkbox"/> Hotel gift shops <input type="checkbox"/> Tie in products for guided tours 	<ul style="list-style-type: none"> <input type="checkbox"/> Political instability <input type="checkbox"/> Exchange rates <input type="checkbox"/> Poor transportation infrastructure <input type="checkbox"/> Local competition <input type="checkbox"/> Seasonal (winter/summer tourists) <input type="checkbox"/> Safety concerns if not use properly <input type="checkbox"/> Cheaper alternatives 	

Minimize vulnerability to threats using strengths

Targeting Decisions

Marketing

From the moment they step into the airport terminal within the United States or onto a cruise ship, we want the prospects to be bombarded with ads to this product until they return home and we feel that with a combination of print, electronic, traditional, and non-traditional mediums described below we have achieved this goal

We would use multiple ways to communicate our product to our target market.

Geographic tagging through social media and online websites would be a very effective way to give potential customers relevant information to their vacation. Placing pamphlets in hotels and on cruise ships visiting Costa Rica would help spark traveler's ideas for snorkeling as an inexpensive activity to do during their visit. Having hotel TV channels that play ads when you first turn them on is a great way to grab consumer's attention when they first get to the hotel. Most times when people check in, they go and drop their stuff off in their rooms and get settled in and turn the TV for noise and comfort while they unpack. In most cases, TVs are tuned to a channel that provides local attractions and things to do around the area. Billboards would offer an opportunity that would catch people's attention when they are out walking and riding around. Ideally the billboard should be placed on a busy road on the way from the main airports to the hotels along with the main roads near the beaches. Restaurant table placemats that are near the beach would be extremely effective. Imagine sitting in an open-air restaurant with beach views and then you come across an ad on your placemat for snorkeling gear. Being close to the ocean and even seeing it while also seeing an ad for the product would very powerful. Placing ads in public transportation like on top of taxis or in city busses is a non-traditional but effective approach since many people visiting Costa Rica won't have their own personal transportation. Placing pamphlets in US international airports with regular routes to Costa Rica would catch

travelers before they even arrive. The baggage claim area in the Costa Rican airports would catch travelers coming in from different parts of the country as well. Providing ad materials to US travel agencies that book at least 50 vacations annually to Costa Rica would focus attention of major agencies rather than trying to distribute materials to every agency in the US. Ads on hotel and travel websites used to book trips to Costa Rica would be a relevant and effective place to use since it would be location specific and encompasses a vast majority of the target market.

Marketing Mix

Product

Our product is a full face snorkel mask. Some of its cool features includes: covers the entire face and keeps it dry, large field of view, allows to breathe naturally through the nose and mouth, no fogging, always clear view thanks to the breathing circulation, and dry top snorkel, keeps water from entering. There is an option to attach a GoPro to the top of the mask to record your snorkeling adventures. The mask comes in an assortment of colors and sizes meant to fit any personality and facial structure.

Price

The price that we suggest retailers to list this product at would be \$69.99. Where applicable we suggest that retailers/stores rent this product out to consumers. As a benchmark, other stores and surf shops rent out snorkel gear at a rate of \$40 per day. Retailers may order in bulk to receive a discount, 25 masks for the price of \$1,500 or 100 masks for the price of \$6,750 and get 5 masks free. These options would incentivize retailers to order more products from us in larger quantities by offering a slight discount.

Place

We will sell our product at tourist hot-spots, cruise port gift shops, large retail stores and convenience stores within 5 miles of the beach, hotels, and PADI-certified dive shops. We chose these location because they are the major spots that our target market would visit. Plus, stores like Walmart are recognized in most parts of the world and would create a sense of comfort for tourist to go to. They may not be going to Walmart for this product but they probably are going there for things like beach towels, sun glasses, or sun screen. Tourists flock into Costa Rica for its hiking and extravagant beaches. To catch the majority of our target market we thought it would be best to stick near the beach cities and dive shops on the coastline. Since Costa Rica is a major cruise destination many tourists won't venture too far from the port and surrounding beaches so offering the product right as they disembark the ship would be effective.

Promotion

We would use multiple ways to communicate our product to our target market. Of which include: geographic tagging through social media and online websites, pamphlets in hotels and on cruise ships visiting Costa Rica, hotel TV channels that play ads when you first turn them on, billboards, restaurant table placemats that are near the beach, public transportation like on top of taxis or in city busses, pamphlets in US international airports with regular routes to Costa Rica, the baggage claim area in the Costa Rican airports, US travel agencies that book at least 50 vacations annually to Costa Rica, and ads on hotel and travel websites.

Government Regulations and Intellectual Property Rights

Costa Rica follows the standard international practice in terms of the cost, the complexity and the steps entailed in securing protection of your intellectual property rights. The country adheres to the main multilateral conventions and treaties for the protection and enforcement of trademark, patents, copyrights and other forms of IPRs, including:

Convention Establishing the World Intellectual Property Organization (WIPO)

Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS)

Paris Convention for the Protection of Industrial Property

Patent Cooperation Treaty 1970 (PCT – [Link to PCT Applicant's Guide](#))

Budapest Treaty on Deposit of Microorganisms for the Purposes of Patent Procedure

International Convention for the Protection of New Varieties of Plants (UPOV)

Trademark Law Treaty (TLT)

The Tribunal, attached to the Ministry of Justice, is a lynchpin in the country's strategy to build greater understanding and respect for IP rights and the IP system as a whole. The Tribunal is the only one of its kind in Latin America that handles cases involving both intangible and tangible rights. In its 10-year existence, the Tribunal has handled some 6,500 cases, of which only around 20 have been passed to the law courts for resolution. “This reflects the high level of confidence that users have in the system (Wipo.int, 2018). One of the strengths of Costa Rica's system is that they offer a streamlined and transparent service. Applicants that wish to appeal the decision of one of their national IP registries can defend their rights and have a second opportunity to present their case (Wipo.int, 2018). Since its inception, the Tribunal has sought to keep abreast of new developments in IP law and to maintain the quality of its decisions. A program of continuous IP training and regular participation by Tribunal specialists in relevant

national and international forums helps ensure that officials keep pace with emerging trends and new legal developments.

IP rights are protected differently in Costa Rica than in the U.S. There is no “international copyright” that will automatically protect someone's IP throughout the world. Protection against unauthorized use in a particular country depends on the national laws of that country. Most countries do offer copyright protection to foreign works under certain conditions, and these conditions are simplified by international copyright treaties and conventions.

Registration of patents and trademarks is on a first-in-time, first-in-right basis, so individuals should consider applying for a trademark and patent protection even before selling their products or services in the Costa Rican market. It is vital that companies understand that intellectual property is primarily a private right and that the US government generally cannot enforce rights for private individuals in Costa Rica. It is the responsibility of the rights' holders to register, protect, and enforce their rights where relevant, retaining their own counsel and advisors. Companies may wish to seek advice from local attorneys or IP consultants who are experts in Costa Rican law.

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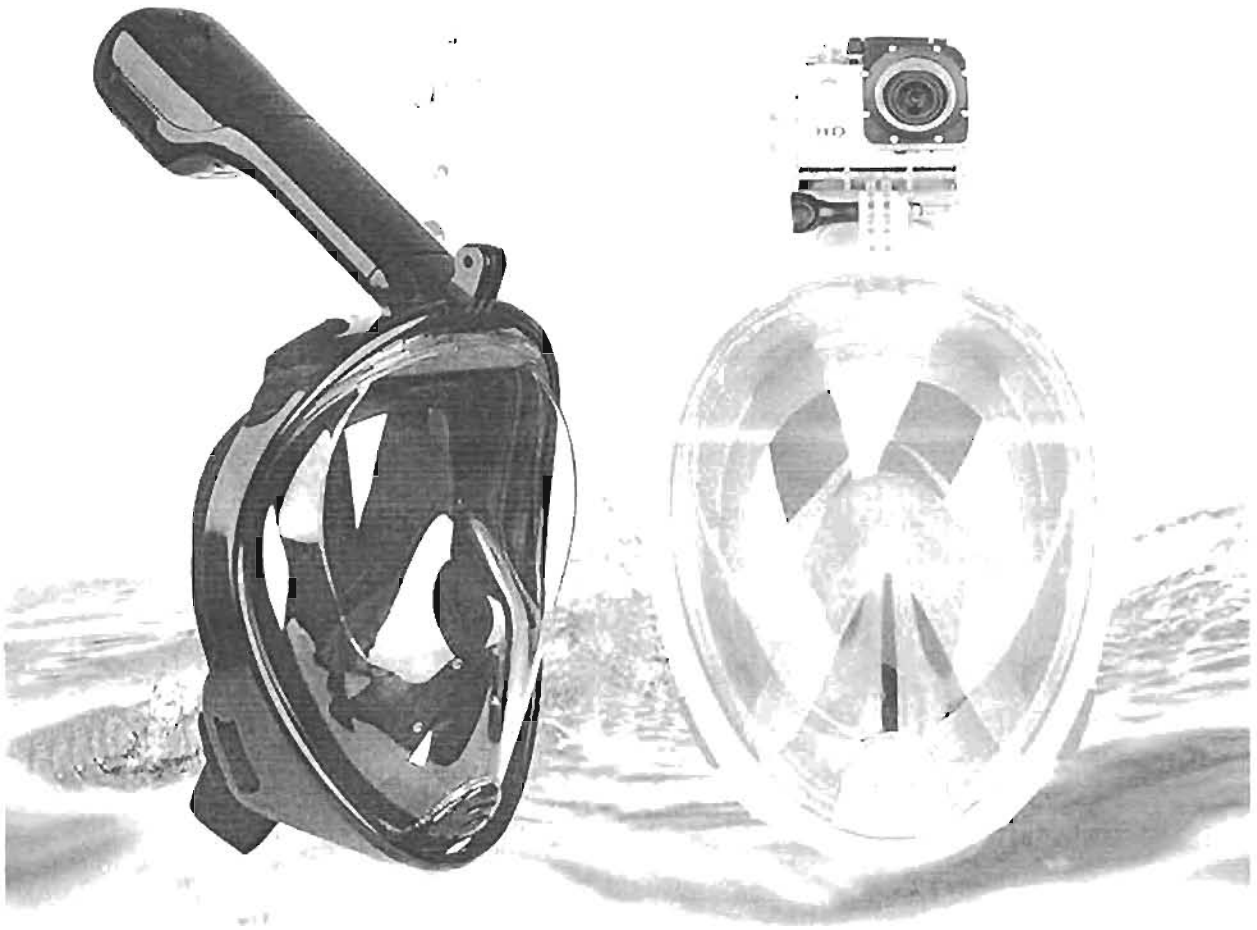
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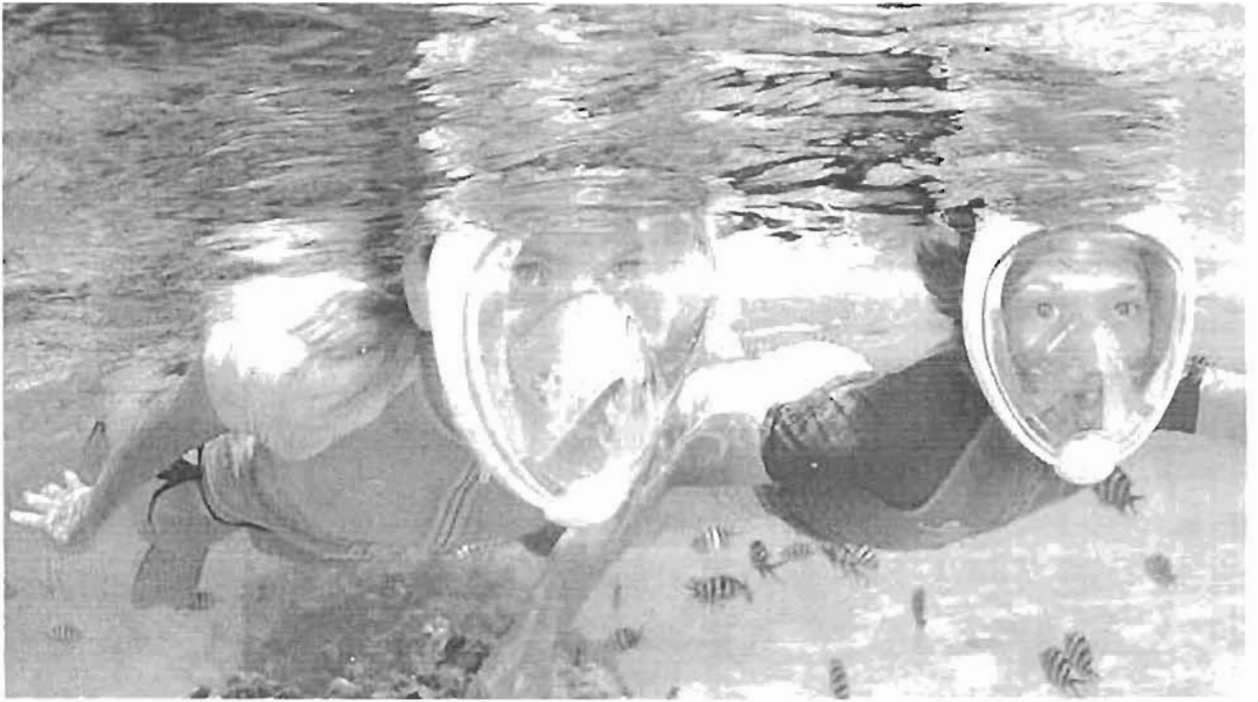
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Appendix





Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Case – Third World Families at Work – Appendix H
This documentation is relevant to Question number:	Business Administration – International Business 4. What does the program do to engage students in collecting, analyzing, and communicating information, etc. – Civic and Global Learning
Briefly summarize the content of the file and its value as evidence supporting program review:	Case used in class to define and frame the issue of child labor in a Global context.

CASE 1

Third-World Families at Work: Child Labor or Child Care?

Jonathan Stein, the new vice president of international contracts for Timothy & Thomas North America, shifted restlessly in his plane seat. During his two-month swing through Asia, he'd been on more planes than he could remember, many of them far more uncomfortable than this flight back to Boston. But he couldn't forget the Pakistani girls who had looked no older than ten years old sweeping the floor between the rows of sewing machines the women worked on.

In that plant in Lahore, the women and girls had been hard at work assembling T&T shorts—currently the hottest item in Timothy & Thomas's 40-year-old line of casual clothes. Like the rest of the company's products, the shorts had that wholesome American "feel good look good" image.

But that image didn't fit the image of those girls at work, and the contradiction left Stein with a quandary. In keeping with Timothy & Thomas's reputation for social responsibility, the company's new Global Guidelines for Business Partners prohibited the use of child labor—with "child" defined as anyone under 14 or the compulsory school age. Until his trip to Asia, Stein had felt good about working for a company that valued employee empowerment and diversity. Yet when it came to Pakistan and other developing countries, he'd found the company's policies no help at all.

In Lahore, Stein had enjoyed the city itself, which was a thriving textile and market center. Its colorful bazaar, wedged between the opulently wealthy and extremely poor districts of the city, was full of silks and the hand-embroidered clothing Lahore was famous for. He had liked the desert landscape and bright white walls, all backed by a cold blue sky. When Stein first met Timothy & Thomas's Pakistani sourcing manager, on a taxi ride to one of the local plants, he was still distracted by so many new sights.

"I should warn you," said Yusuf Ahmed, the sourcing manager, just minutes after shaking Stein's hand. "There's some confusion about the guidelines."

Stein stopped admiring the scenery. "What do you mean?"

"All the good contractors use kids. The little girls come to the plant with their mothers, and I know there are others on the machines who are younger than 14. That's just how it's done here."

"Haven't you told them they have to do it differently?" Stein's hands tensed on his knees. The taxi jounced through the narrow streets, no longer surrounded by the picturesque overflow from the bazaar.

"I'm not a cop," Ahmed said. "Besides, I'm not sure you'd really want me to do that. The situation is more complicated than you think."

"What's complicated? You say contractors aren't in compliance, so we threaten to cut off the contracts until they are."

Ahmed leaned forward impatiently. "Do you realize how committed we are? We've got the Lahore contractors alone assembling half a million T&T products a year—at competitive prices, I can assure you."

"I know the numbers," Stein said. "But that doesn't change the guidelines. We can't have kids in the plants, right?"

HBR's cases are derived from the experiences of real people and real companies. As written, they are hypothetical, and the names used are fictitious.

"Third-World Families at Work: Child Labor or Child Care?" by Martha Nichols et al., *Harvard Business Review*, Jan/Feb 1993, Vol. 71, Issue 1. Copyright © 1993 by the Harvard Business School Publishing Corporation. Reprinted by permission of Harvard Business School Publishing. All rights reserved.

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@lsu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Research Assignment III – Appendix I
This documentation is relevant to Question number:	Business Administration – International Business 4. What does the program do to engage students in collecting, analyzing, and communicating information, etc. – Civic and Global Learning
Briefly summarize the content of the file and its value as evidence supporting program review:	Research assignment which students must research, quantify, and analyze the impact on developing countries the relationship between trade and the environment.

INTB 375
Ralf Wilhelms

Research Assignment III

Student First: _____ Last: _____

Id #: _____

Explain the relationship between protection of the environment and economic development.

- A) Consider the following major trade-related environmental disputes at the WTO: US-Standards for Reformulated and Conventional Gasoline (provisions of the U.S. Clean Air Act, DS52)
- U.S. – Import Prohibition of Certain Shrimp and Shrimp Products (selling of shrimp caught in nets without turtle extractors, DS58)
 - European Communities – Measures Affecting Asbestos and Asbestos-Containing Products (DS135)
 - European Communities – Measures Concerning Meat and Meat Products (containing growth Hormones, DS26, DS48, DS39)
 - European Communities – Measure Affecting the Approval and Marketing of Biotech Products (genetically engineered foods, DS291)

Using one of these cases, write a case study on the relationship between trade and environmental issues, (Be sure to explore both sides of the debate).

For alternative views on trade and the environment, see the websites of Public Citizen and the Sierra Club and a highly educational site presented by the Levin Institute at the State University of New York called GLOBALIZATION101.ORG. To learn more about the important Shrimp/Turtle case at the WTO, see the Website of the National Wildlife Federation.

Assessment - MANAGEMENT

13. Provide evidence that the degree-level program outcomes are clearly stated and are effectively assessed, including the “use of results.”

LSB offers its management program at the main campus in Sault Ste. Marie and at regional centers in Petoskey and Escanaba, in Michigan, allowing students from northern Michigan and Northern Ontario, Canada access to a quality management education. LSB is committed to serving the local and regional community by providing a qualified labor force that can attract new businesses and serve existing businesses, nonprofits and government agencies. We offer management courses on a rotating-basis, online, and through the week (including evenings and weekends) to accommodate traditional and nontraditional students on all three campuses. The management program has achieved program-level ACBSP accreditation, demonstrating the academic rigor and quality of the management program.

The management program includes the core business curriculum and specialized courses in the areas of human resources and interpersonal skill development such as leadership, communication and ethics; business and labor law; and data-driven decision-making with technology. The program outcomes include:

- A. **Leadership.** Demonstrate leadership, utilizing exceptional interpersonal skills, inclusive practices and performance management strategies to engage and develop team and talent.
- B. **Management Practice.** Develop goals, and design and implement control mechanisms towards the successful achievement of those goals, for themselves and others.
- C. **Communication of Ethical and Critical Thinking.** Be able to make ethical decisions, utilizing critical thinking skills, and clearly communicate the decisions made along with the rationale.
- D. **Technology.** Demonstrate the role and impact of technology on managers and the organization.
- E. **Data-driven Decision-making.** Develop and implement data-driven management decision-making in business operations.
- F. **Business Law.** Define and explain the basic principles of contract, personal property and sales, agency, partnerships, corporate law, commercial paper law that apply to business transactions, etc.
- G. **Labor Law.** Define and explain labor law through case study method as it relates to Civil Rights Act, Age Discrimination Act, Family Medical Leave Act, OSHA, Unfair

Labor Practices (union and employers), National Labor Relations Act, anti-trust laws, representative elections procedures, and other legislations, etc.

- H. **HR Management.** Define and explain all the functions of human resource management: recruiting, selecting, training and development, compensation, performance appraisals, labor relations, etc.

The “4-Column Program Assessment Report for Business Administration - Management” provides support for clearly stated degree-level program outcomes, effective assessments, including the use of results. We use a variety of assessments for the program outcomes, including independent and objective assessments (such as the Major Field Test in Business), student self-assessments, and third-party assessment (Professional Advisory Board). See chart below.

Outcomes	Assessment
Leadership skills	Senior survey – self and peer assessment
Management practice	Capstone project Undergraduate research projects
Communication of Ethical and Critical Thinking	Survey of Professional Advisory Board – Business professionals who hire and interact regularly with our graduates
Technology	Computer Lab Sessions Major Field Test – Technology section
Data-driven decision-making	Survey research Major Field Test – Quantitative Analysis section
Business and Labor Law	Course Exams Major Field Test – Legal section
HR Management	Course Exams

14. Explain how results from degree assessments were used to improve the degree program. Include specific examples.

- A. For example, LSB teaches and measures *leadership skills*. A key program outcome:

Demonstrates leadership, utilizing exceptional interpersonal skills, inclusive practices, and performance management strategies to engage and develop teams and talent.

Assessment: We use a “Senior Survey” administered to all graduating seniors in order to gather data to support student development of leadership skills while attending LSB. Our target is for 90% of our management graduates to score “stronger” or higher on their self-assessment and peer assessments.

Senior Survey Question: Rate yourself on the following attributes currently, compared to your skills or attitudes as a freshman.

Leadership abilities: Much stronger, Stronger, No Change, Weaker, Much Weaker, Unable to Rate

Assessment Results: During the academic years 2016-2017, 80% of students achieved this outcome and during 2017-2018, 90% of students achieved this outcome, demonstrating a clear improvement in student development of leadership skills.

Use of Results: We used the 2016-2017 results of “80% of students achieved this outcome” (which did not meet our target of 90%) to implement additional experiential leadership development activities within courses. (See Intellectual Inquiry for examples.) As a result, in 2017-2018, we achieved the target: “90% of students achieved this outcome.”

- B. For example, LSB teaches *technology*. A key program outcome:

Demonstrate the role and impact of technology on managers and the organization.

Assessments: We use two assessments to measure whether students achieve this program outcome: Computer lab sessions and Major Field Test – Technology section. Our target for computer lab sessions is for 85% of students to achieve 75% or above. The target for the MFT – Technology section is for management students to meet or exceed the national average.

Assessment Results – Computer Lab Sessions: During the academic year 2016-2017, 83% of students achieved the computer lab outcome and during 2017-2018, 100% of students achieved the computer lab outcome, demonstrating a clear improvement of technology skill development in MS Excel, MS Access and SAP ERP simulations.

Use of Results – Computer Lab Sessions: Computer lab sessions and teaching strategies were continued.

Assessment Results – MFT - Technology section:

During the academic year 2016-2017, management students scored below the national average in this section of the MFT; however, during 2017-2018, management students scored above the national average, demonstrating a clear improvement in achieving this program outcome. See the chart below:

By semester:	Mgmt students' scores	National average
Fall 2016	42	51.5
Spring 2017	47	51.5
Fall 2017	65	51.5
Spring 2018	57	51.5

Use of Results – MFT - Technology section:

After reviewing earlier MFT results (prior to 2016), we had concerns that our management students were not developing the technology knowledge required by both the MFT and the business marketplace. Students were already required to take data spreadsheet and database courses; however, at a management level, developing computer software skills were not enough to address the changing business environment that required business professionals to understand the broader role and impact of technology in organizations. After some discussion at our annual meeting, we decided to implement and adopt a new course: MGMT 280: Introduction to Management Information Systems, and hired a new instructor to teach this course. This course was adopted into the curriculum as a 200-level, required course for all students in the Fall 2013.

The full effects of our management students demonstrating an improvement in technology knowledge and the role and impact of technology in organizations were not realized until 2017-2018, as evidenced by management students exceeding the national average in the MFT - Technology section (see the chart above).

- C. For example, LSB teaches *data-driven decision making*. A key program outcome:

Develop and implement data-driven management decision-making in business operations.

Assessments: We use two assessments to measure whether students achieve this program outcome: Survey research project results and the Major Field Test – Quantitative analysis section. Students conduct a survey research project where they use statistical tests and techniques to conduct data analysis to use in management decision-making. Our target for the survey research assessment is for 70% of students to achieve 75% or above. The target for the MFT – Quantitative analysis section is for management students to meet or exceed the national average.

Assessment Results – Survey Research Project: During the academic year 2016-2017, 96% of students and during 2017-2018, 70% of students achieved the survey research outcome.

Use of Results – Survey Research Project: The goal was met and teaching strategies were continued; however, there was a decline in the percentage of students who achieved the outcome. To address this decline, a detailed, project rubric and written, detailed guidelines were implemented and reviewed with students through the semester as each phase was completed, as well as dedicating more class time to the project.

Assessment Results – MFT - Quantitative Analysis section:

During the academic year 2016-2017 and Fall 2017, management students scored just above the national average in this section of the MFT; however, during Spring 2018, management students scored below the national average, in achieving this program outcome. See the chart below:

By semester:	Mgmt students' scores	National average
Fall 2016	35	34.1
Spring 2017	35	34.1
Fall 2017	36	34
Spring 2018	27	34

Use of Results – MFT – Quantitative Analysis section:

After reviewing earlier MFT results (prior to 2016), we had concerns that our management and all of our business students were not developing the data

analytics/quantitative knowledge required for this section of the MFT and the rapidly changing business marketplace. After some discussion, we decided to implement and adopt a new course: MGMT 371: Operations/Business Analytics, and hired a new instructor to teach this course. This course was adopted into the curriculum as a 300-level, required course for all students in the Spring 2014. Since this course built on the foundational quantitative skills learned in BUSN 211 Introduction to Business Statistics, BUSN 211 was established as a prerequisite to MGMT 371.

The full effects of our management students demonstrating an improvement in quantitative skills have not been realized (see the chart above). Results are just above the national average or just below the national average; therefore, further investigation is needed to implement appropriate research-based teaching strategies to specifically address this issue. For example, in MGMT 371, a pre- and post-test will be administered to measure student quantitative skills at the beginning and end of the semester, respectively, as a method to inform whether students have improved their quantitative skills. The results will be used to determine where students are weakest in quantitative skills in order to better target the course content to the improvement of those skills.

The attached "4-Column Program Assessment Report for Business Administration - Management" informs on the remaining program outcomes, assessment results, whether the target was met and how we used the results to make improvements and modifications to help our students achieve the program outcomes.

- D. For example, LSB teaches **business and labor law**. Management students take three law courses (two in business law and one in labor law). The applicable program learning outcomes are:

Define and explain the basic principles of contract, personal property and sales, agency, partnerships, corporate law, commercial paper law that apply to business transactions, etc.

Define and explain labor law through case study method as it relates to Civil Rights Act, Age Discrimination Act, Family Medical Leave Act, OSHA, Unfair Labor Practices (union and employers), National Labor Relations Act, antitrust laws, representative elections procedures, and other legislations, etc.

Assessments: We use two assessments in this area: Major Field Test - Legal section and Exams. For the MFT - Legal section, our target for management students is to meet or

exceed the national average. For exams, our target for the business law courses is for 70% of students to obtain 70% or higher and our target for the labor law course is for 50% of students to obtain 70% or higher. The labor law course is a very difficult course because the instructor uses the case study approach and the opinions are very complex.

Assessment Results - MFT - Legal Section and Use of Results:

During the academic years 2016-2017 and 2017-2018, management students' scores exceeded the national average; therefore, the goal was achieved and no corrective action was needed.

Assessments Results - Exams

Business Law Courses. During the academic year 2016-2017 and 2017-2018, students met or exceeded the target of 70% of students will obtain 70% or higher, with a year-to-year improvement of 75% to 80% of students (obtained 70% or higher).

Labor Law Course. During the academic year 2016-2017, 45% of students obtained 70% or higher and during 2017-2018, only 40% of student obtained 70% or higher.

Use of Results - Exams

Business Law Courses. The goal was met and no correction action was necessary.

Labor Law Course. This course remains difficult for students; however, we believe this course contributes to the high scores achieved on the MFT - Legal section. To address the low exam scores students are given opportunities to submit term papers or chapter summaries to gain more content knowledge.

Quality, Resources and Support - MANAGEMENT

- 15. Explain how the program ensures that degree program-level and course-level learning outcomes are at an appropriate level. Attach evidence, including a degree audit for the program.**

LSB regularly reviews, monitors and improves its programs to ensure delivery of quality business education as supported by its success in achieving programmatic accreditation from the ACBSP. The extent to which each program course addresses student learning objectives is provided on the chart below. These student learning objectives were generated for the ACBSP accreditation. In addition, the degree audit for the management program follows.

At the end of every academic year, we gather as business faculty of the Lukenda School of Business and in our separate disciplines within the business school to analyze the data from TracDat (university's assessment repository), senior survey, Major Field Test and Professional Advisor Board survey. The management faculty reviews program and course outcomes, discuss students' strengths and weaknesses supported by program and course data, discuss ideas and suggestions from all stakeholders, including feedback from students on course evaluations, the survey from the Professional Advisory Board, any other feedback that we may have received from parents, prospective students, etc. The Major Field Test is an independent and objective tool that we review in detail - specifically, we review the results of the management students in Management, Quantitative Analysis, Legal and Technology sections as this is the main purview of the management program.

At this annual meeting at the end of the academic year, we consider any major initiatives that will strengthen the program. In the past, our major initiatives included adding MGMT 280 and MGMT 371 to the curriculum and making these required courses for all business students.

For example, at the end of the spring 2018 semester, we made a change to MGMT 280 to add substantially more computer sessions in Excel. This change was a result of feedback from current students and alum and their employers who identified and highlighted student weakness in Excel skills. The response from one of the students, "I wish I would have paid more attention to Excel instruction." We realized that while students received Excel instruction in MGMT 280, the instruction had to be more intense, more frequent, and teach sophisticated Excel techniques. We immediately implemented this change in the fall 2018 course. On the first day of class, students rated their Excel skills as "Beginner,"

“Intermediate,” or “Advanced.” During the last week of class, students will rate their Excel skills again after they received more intense Excel instruction.

In the spring 2019 (in addition to our annual review), the professors in the management discipline (Dr. Madan Saluja, Professor Jody Rebek, and Professor Marta Diaz) will be assessing and updating management program learning objectives, reviewing the current course rotation for management courses, and considering other evidence-based teaching methods that can enhance classroom learning. Particularly, the results of a teaching project, developed and implemented by Professor Marta Diaz, through her participation in the Early Career FLC, will be discussed to determine whether to add this teaching method to other management courses.

The teaching project consists of implementation of Course Preparedness Assignments (CPAs) in MGMT 280 in the spring 2019 for most class sessions, as appropriate, to prepare students for class discussions in business technology. The project includes developing an assessment tool and measuring student achievement of learning outcomes in the course. Early results from a pilot implementation of CPAs in the fall 2018 MGMT 280 course are promising: the instructor has observed improved class attendance and greater student participation and engagement in the classroom. An attachment of a submitted CPA is included. However, to note is that the results from full implementation are intended to go further and show improved student achievement of learning outcomes in the course.

Intellectual Inquiry - MANAGEMENT

16. Explain what the program does to engage students in collecting, analyzing, and communicating information; mastering modes of inquiry or creative work; developing skills integral to the degree program. Attach examples of undergraduate research, projects, and creative work.

A. Collecting, analyzing, and communicating information

The examples below demonstrate a variety of methods used in the management program and courses, inside and outside the classroom, that engage students in collecting, analyzing and communicating information.

In **MGMT 371 - Operations/Business Analytics**, students conduct survey research projects as their term project. The research process includes developing measurable independent and dependent variables, literature review, survey development, survey distribution, data entry in Excel, data analysis using various statistical techniques in SPSS and a final research paper. Students distribute surveys to LSSU students and present their survey and findings to the class. An example of a research project is attached.

In **MGMT 360 - Management Concepts and Applications**, students participate in events as their term project. Events will vary from year to year. For example, during 2017-2018, students participated in local business events and meetings, volunteering their time which resulted in students gaining experience in networking with local businessmen and women, and marketing and administering events/meetings. For example, in one project, students worked with the Executive Director of the Downtown Development Authority of Sault Ste. Marie, Michigan to plan and execute a large meeting event with local volunteers and business representatives. The meeting attendees were determining which sub-committees of the DDA they would be members of and the focus of the subcommittees such as Economic Vitality, Marketing, Promotion, and Organization. The students presented poster boards representing the different committees and the focus of each subcommittee and helped the Executive Director administer the meeting.

In the fall 2018 (which is outside the academic years covered by this program review, however, is another example of a major project in MGMT 360), students sponsored a high school business case competition. To enhance skill development in *Management Concepts*, students had to plan, organize, lead and control a case competition for secondary students. Students were responsible for all aspects of the event including obtaining sponsorships from local area businesses and programs within the university, communicating the event to area

high schools, collaborating with high school administrators, collecting data on the event and analyzing the results for improvement next year. The class organized into functional units and delivered the *Superior Case Competition* which raised \$3,500 in financial contributions (\$300 in-kind), attracted 10 teams for the local area and made a profit.

In **MGMT380 - Principles of Leadership**, students are required to conduct research, and produce a mini-literature review for a particular leadership topic. The research is found and summarized and students work in groups to translate the information found into both an essay and poster, which they present at the *Annual Senior Research Symposium*. Students must ensure they follow proper APA essay format and referencing to communicate their essay and poster.

In **MGMT476 - Employee Training and Development**, which functions as a talent management and development agency, also operates under a brand students created called *APEX - Advancing Professional Expertise*. This year *APEX* members (students in the class) will design, develop and present diversity training two clients: Algoma Steel and the Algoma Nurse Practitioner-Led clinic. Algoma Steel, has a which is intended for 2,000 employees.

B. Mastering modes of inquiry or creative work

The examples below demonstrate a variety of methods used in the management program and courses, inside and outside the classroom, that engage students in mastering modes of inquiry or creative work.

In **MGMT 280 - Introduction to Management Information Systems**, **BUSN 350 - Business Law I**, **BUSN 355 - Business Law II** and **MGMT 451 - Labor Law**, students submit term papers that demonstrate deeper knowledge in the respective areas. For example, in **MGMT 280**, all students are required to submit a term paper on a business technology topic of their choice, demonstrating research skills and developing deeper knowledge of a business technology topic beyond the knowledge gained in the classroom. An example of a student term paper on cloud computing is attached.

There are other opportunities for mastering modes of inquiry that will be implemented. For example, during the academic year 2018-2019, Professor Marta Diaz is co-facilitating a cross-disciplinary early career faculty learning community (Early Career FLC) that is researching and implementing evidence-based teaching methods in the classroom in order to contribute the scholarship of teaching and learning at LSSU. The results will be presented to the faculty participants' respective colleges and schools. There will be opportunities to

engage students in a student learning community outside the classroom and better prepare students for graduate education as a result of the faculty FLC experience.

C. Developing skills integral to the degree program

The examples below demonstrate a variety of methods used in the management program and courses, inside and outside the classroom, that engage students in developing skills integral to the degree program.

Students apply to take part as a volunteer for the *Northern Ontario Business Case Competition (NOBCC)* and have done so for the past two years. There are nice spots available each year for senior students. Students are taught in a few workshops how to conduct case analysis and polish their public speaking skills. Students have three hours, on two occasions in one day, to prepare a case solution and present to judges. In sixteen Senior Post-Secondary student teams, the Lukenda School of Business team has placed second (2017) and tied for first place (2018).

MGMT464 - Organizational Behavior students have to form teams and establish a team code and culture before performing in a simulation for which they are all assigned roles. Students must select and understand their role, assemble as a team, discuss how they will embark on the journey of the **HBR Mount Everest** simulation. They must analyze information together, communicate, discuss and dialogue to form team decisions, and work their way effectively through the challenges encountered.

Student Clubs (Contributing to the Profession and the Community)

Business Administration - Management students participate in Enactus and SHRM student clubs.

Enactus is a community of student, academic, and business leaders committed to using the power of entrepreneurial action to transform lives and shape a better, more sustainable, world. Enactus is a worldwide organization in over 36 countries. There are over 535 competing teams alone in the United States, and more than 1,600 in the world. More than 66,000 students involved in Enactus put in over 7 million volunteer hours per year to help improve people's livelihoods.

Enactus has worked with people and organizations in the local area such as the Diane Pepler Resource Center, elementary schools, and Friends of Caring Animal Shelters (FOCAS). Projects have even included far-away places such as Cameroon, Africa.

Members participate in the national Enactus job fair. LSSU always has a few members leave the competition with jobs in hand. Participating companies have included established names such as Hershey, Ford, Home Depot and Walmart. Enactus has over 300 corporate sponsors.

SHRM Student Chapter of LSSU is part of the world's largest human resource management association. SHRM was founded in 1948 and serves over 575 chapters worldwide. The LSSU Chapter became an official SHRM Chapter in the spring of 2013. The goal of SHRM is to help business professionals engage, grow and connect. For students, SHRM offers a vast assortment of resources such as SHRM publications, webcasts, conferences, career-networking opportunities, and HR career resources.

SHRM events include human resources professional speakers and conferences. Past speakers were from War Memorial, Old Mission Bank and LSSU.

The chapter also helps those in the club prepare for HR certification which takes place during the spring semester. In the past, students in the Business Administration – Management program sat for the SHRM exam and passed, representing a 100 percent pass rate for LSB students, while the SHRM national pass rate is 62 percent.

Sustainable Business Strategy Club

Students who join this club will engage in meaningful projects and support purpose-driven businesses. As purpose-driven leaders, students will transform firms or initiate start-ups or events as catalysts for positive change. Two areas of interest that students will initiate or create calls for include: (a) sustainable business projects and, (b) support students in sustainable business start-ups.

Annually, LSB inducts management program students into the business honor society, Sigma Beta Delta. The society is considered to be one of the highest forms of national recognition a business student can achieve, open to Juniors and seniors and selected based on class ranking and student involvement.

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	4-Column Program Assessment Report for Business Administration - Management
This documentation is relevant to Question number:	Assessment Questions #13 and #14
Briefly summarize the content of the file and its value as evidence supporting program review:	This document supports the evidence required to answer Assessment Questions #13 and #14 on program outcomes, assessment, and use of results.

Assessment: Program Four Column



Program (ColS) - Business Administration-Management BS

Assessment Contact: Prof. Marta Diaz

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>Leadership - Demonstrate leadership, utilizing exceptional interpersonal skills, inclusive practices and performance management strategies to engage and develop team and talent.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Goal Level (Bloom/Webb): High-Level (Creating/Evaluating) [Bloom]</p> <p>Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal.</p>	<p>Indirect - Survey, including self-evaluation, peers, or graduates - Questions pertaining to Interpersonal skills, Ability to influence, and leadership abilities</p> <p>Criteria Target: 90% of students will score these skills as "Stronger" or higher on the Senior Survey, as a result of their management education.</p>	<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>90% of students reported achieving these outcomes on the Senior Survey. (08/23/2018)</p> <hr/> <p>Finding Reporting Year: 2016-2017</p> <p>Goal met: No</p> <p>80% of students achieved this outcome. (08/23/2018)</p>	<p>Use of Result: Due to meeting the goal, we will continue using the learning strategies employed. (08/23/2018)</p> <hr/> <p>Use of Result: We will utilize experiential leadership development activities within classes. (08/23/2018)</p>
<p>Management Practice - Develop goals, and design and implement control mechanisms towards the successful achievement of those goals, for themselves and others.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Institutional Learning: ILO3 - Analysis and Synthesis - Students will organize and synthesize evidence,</p>	<p>Direct - Capstone Project - including undergraduate research - Business Plan Assessment (Management)</p> <p>Criteria Target: 80% of management students will obtain 80% or above on their ability to manage.</p> <p>High Impact Program Practices 1: Capstone Course(s), Projects</p>	<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>More than 80% of the management students on the Business Plan Assessment scored 80% or above. (08/23/2018)</p> <hr/> <p>Finding Reporting Year: 2016-2017</p> <p>Goal met: Yes</p> <p>More than 80 percent of the students obtained 80% or more on management criteria. (08/23/2018)</p>	<p>Use of Result: Continue employing strategies for management learning due to the success of student outcomes. (08/23/2018)</p> <hr/> <p>Use of Result: Keep employing similar teaching strategies for engaging students in using management practices.</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
ideas, or works of imagination to answer an open-ended question, draw a conclusion, achieve a goal, or create a substantial work of art.			(08/23/2018)
<p>Communication of Ethical and Critical Thinking - Be able to make ethical decisions, utilizing critical thinking skills, and clearly communicate the decisions made along with the rationale.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Institutional Learning: ILO1 - Formal Communication - Students will develop and clearly express complex ideas in written and oral presentations., ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal.</p>	<p>Indirect - Survey, including self-evaluation, peers, or graduates - Lukenda School of Business Professional Advisory Board Survey (communication skills, critical thinking skills, interpersonal skills, work ethic)</p> <p>Criteria Target: 85% of Professional Advisory Board members will agree that business graduates have these skills.</p>	<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>Students were reported within the 99th percentile of having these skills by Professional Advisory Board members. (08/23/2018)</p> <hr/> <p>Finding Reporting Year: 2016-2017</p> <p>Goal met: Yes</p> <p>Students were reported within the 99th percentile. (08/23/2018)</p>	<p>Use of Result: Continue to improve strategies to engage students in this important topic. (08/23/2018)</p> <hr/> <p>Use of Result: Continue employing teaching strategies used. (08/23/2018)</p>
<p>Technology - Demonstrate the role and impact of technology on managers and the organization.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem.</p>	<p>Direct - Laboratory, Clinical, Skill/Competency Assessments - Computer lab sessions with Excel and Access (MGMT 280 Introduction to Management Information Systems)</p> <p>Criteria Target: 85% of the students will obtain 75% or above.</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: Yes</p> <p>83% of students successfully completed the lab sessions. (08/23/2018)</p> <hr/> <p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>100% of students successfully completed the lab sessions. (08/23/2018)</p>	<p>Use of Result: Goal met. Correction action is not required. (08/23/2018)</p> <hr/> <p>Use of Result: Goal met. Correction action is not required. (08/23/2018)</p>
	<p>Indirect - Report/Audit - External - ETS Major Field Test in Business</p> <p>Criteria Target: Mean score of management students will meet or exceed the national average of the Information Systems section.</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: No</p> <p>Mean score of management students did not meet the national average in the Information Systems section. (08/23/2018)</p>	<p>Use of Result: Result was used to hire new professor to teach MGMT 280. (08/23/2018)</p>
		<p>Finding Reporting Year: 2017-2018</p>	<p>Use of Result: Goal met.</p>

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
		Goal met: Yes Mean score of management students exceeded the national average of the Information Systems section. (08/23/2018)	Correction action is not required. (08/23/2018)
Data-driven Decision-making - Develop and implement data-driven management decision-making in business operations. Goal Status: Active Goal Category: Student Learning Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem.	Direct - Group project, collaborative learning - Survey research paper in APA format (MGMT 371 Operations and Business Analytics) Criteria Target: 70% of the students will obtain 75% or above.	Finding Reporting Year: 2017-2018 Goal met: Yes 70% of the students obtained 75% or above. (08/23/2018)	Use of Result: Goal met. Corrective action is not required. (08/23/2018)
		Finding Reporting Year: 2016-2017 Goal met: Yes 96% of students obtained 75% or above. (08/23/2018)	Use of Result: Goal met. Corrective action is not required. (08/23/2018)
	Indirect - Report/Audit - External - ETS Major Field Test in Business Criteria Target: Mean score of management students will meet or exceed the national average of the Quantitative Analysis section.	Finding Reporting Year: 2016-2017 Goal met: Yes Mean score of management students exceeded the national average of the Quantitative Analysis section. (08/23/2018)	Use of Result: Goal met. Correction action is not required. (08/23/2018)
		Finding Reporting Year: 2017-2018 Goal met: Yes Mean score of management students exceeded the national average of the Quantitative Analysis section. (08/23/2018)	Use of Result: Goal met. Correction action is not required. (08/23/2018)
Business Law - Define and explain the basic principles of contract, personal property and sales, agency, partnerships, corporate law, commercial paper law that apply to business transactions, etc. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom] Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal.	Indirect - Report/Audit - External - ETS Major Field Test in Business Criteria Target: Mean score of management students will meet or exceed the national average in the Legal section.	Finding Reporting Year: 2016-2017 Goal met: Yes Mean score of management students exceeded the national average in the Legal section. (08/23/2018)	Use of Result: Goal met. Corrective action is not required. (08/23/2018)
		Finding Reporting Year: 2017-2018 Goal met: Yes Mean score of management students will meet or exceed the national average in the Legal section (08/23/2018)	Use of Result: Goal met. Corrective action is not required. (08/23/2018)
	Direct - Exam/Quiz - within the course - Average of all exams - (BUSN 350 or BUSN 355 Business Law I & II) Criteria Target: 70% of students will obtain 70% or higher.	Finding Reporting Year: 2016-2017 Goal met: Yes 75% of students obtained 70% or higher. (08/23/2018)	Use of Result: Goal met. Corrective action is not required. (08/23/2018)
		Finding Reporting Year: 2017-2018 Goal met: Yes 80% of students obtained 70% or higher. (08/23/2018)	Use of Result: Goal met. Correction action is not required. (08/23/2018)
Labor Law - Define and explain labor	Indirect - Report/Audit - External -	Finding Reporting Year: 2016-2017	Use of Result: Goal met.

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>law through case study method as it relates to Civil Rights Act, Age Discrimination Act, Family Medical Leave Act, OSHA, Unfair Labor Practices (union and employers), National Labor Relations Act, anti-trust laws, representative elections procedures, and other legislations, etc.</p> <p>Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom] Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal.</p>	<p>ETS Major Field Test in Business Criteria Target: Mean score of management students will meet or exceed the national average in the Legal section.</p> <p>Direct - Exam/Quiz - within the course - Average of all exams - MGMT 451 Labor Law Criteria Target: 50% of students will obtain 70% or higher.</p>	<p>Goal met: Yes Mean score of management students exceeded the national average in the Legal section. (08/23/2018)</p> <p>Finding Reporting Year: 2017-2018 Goal met: Yes Mean score of management students will meet or exceed the national average in the Legal section. (08/23/2018)</p> <p>Finding Reporting Year: 2017-2018 Goal met: No 40% of students obtained 70% or higher. (08/24/2018)</p> <p>Finding Reporting Year: 2016-2017 Goal met: No 45% of students obtained 70% or higher. (08/23/2018)</p>	<p>Correction action is not required. (08/23/2018)</p> <p>Use of Result: Goal met. Corrective action is not required. (08/23/2018)</p> <p>Use of Result: Students are given the opportunity to submit a term paper or summaries of chapters with no time constraints which will enhance their learning. (08/24/2018)</p> <p>Use of Result: Students are given the opportunity to submit a term paper or summaries of chapters with no time constraints which will enhance their learning. (08/23/2018)</p>
<p>HR Management - Define and explain all the functions of human resource management: recruiting, selecting, training and development, compensation, performance appraisals, labor relations, etc.</p> <p>Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom] Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal.</p>	<p>Direct - Exam/Quiz - within the course - Average of all exams - MGMT 365 Human Resource Management Criteria Target: 70% of students will obtain 70% or higher.</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes 77% of students obtained 70% or higher. (08/23/2018)</p> <p>Finding Reporting Year: 2017-2018 Goal met: Yes 77% of students obtained 70% or higher. (08/23/2018)</p>	<p>Use of Result: Goal met. Corrective action is not required. (08/23/2018)</p> <p>Use of Result: Goal met. Corrective action is not required. (08/23/2018)</p>
<p>Program Review - The Program</p>	<p>Indirect - Report/Audit - Internal -</p>		

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>provides evidence in support of Program Review in accordance with the Higher Learning Commission Criteria for Accreditation (4.A. The institution demonstrates responsibility for the quality of its educational programs. 1. The institution maintains a practice of regular program reviews.)</p> <p>Goal Status: Active</p> <p>Goal Category: Periodic Program Review</p>	<p>The Program conducts evidence-supported regular program review. The Program addresses the key components of the , incorporates feedback from assessment activities, and documents the impact of assessment findings and subsequent actions on student learning.</p> <p>Criteria Target: The Program Review will address the following criteria:</p> <ol style="list-style-type: none"> 1. Contribution to LSSU Mission/Vision 2. Metrics of Productivity 3. Internal and External Program Demand 4. Program Quality 5. Program Assessment 6. Opportunity Analysis 		
<p>2.1 Program Enrollment - Strategy</p> <p>2.1 The Program establishes realistic goals for program enrollment that are optimistic, realistic, achievable.</p> <p>Goal Status: Active</p> <p>Goal Category: Enrollment</p>	<p>Regular, recurring - The program sets goals for program enrollment which are time-based, progressive, achievable and quantitative.</p> <p>Criteria Target: Program Enrollment Growth Goal: _____ by _____</p>		
<p>Business Knowledge - Graduates will demonstrate knowledge of business-core subjects.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Goal Level (Bloom/Webb): Level 2 (Skills and Concepts) [Webb]</p> <p>Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve</p>	<p>Direct - Exam/Quiz - Standardized - ETS Major Field Test in Business administered to graduating seniors in BUSN466 (Business Policy)</p> <p>Criteria Target: The Lukenda School of Business mean percent correct will equal or exceed the national mean in each assessment indicator area.</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: No</p> <p>Fall 2016: The LSB met its goal in each assessment indicator area.</p> <p>Spring 2017: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas. (08/30/2018)</p>	<p>Use of Result: Significant improvement has been made in the Quantitative Analysis and Information Systems sections since a management professor with a strong quantitative background was hired and courses in information systems and analytics were added to the common professional component of all business bachelor degrees. Goals in these sections were met during the 2016 and 2017 fall</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>a complex problem.</p>		<p>Finding Reporting Year: 2017-2018 Goal met: No Fall 2017: The LSB met its goal in each assessment indicator area. Spring 2018: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas. (08/30/2018)</p>	<p>semesters. The LSB mean was only slightly below the national mean during the 2017 spring semester. (08/30/2018)</p> <p>Use of Result: The LSB faculty member who teaches MGMT280 (Intro to Management Information Systems) and MGMT371 (Operations & Business Analytics) continues to make adjustments to teaching methods and assignments to deepen students' understanding of difficult concepts covered in these courses. Beginning fall 2018, the professor will implement quizzes to encourage students to read the textbook, assign graded homework, require an online subscription to study material and add more sophisticated Excel exercises. Also, she will begin the semester by giving a presentation on how to succeed in quantitative courses. (08/30/2018)</p>
<p>Professional Skills - Graduates will demonstrate skills in research, communications and critical thinking. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom] Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a</p>	<p>Direct - Capstone Project - Including undergraduate research - Business plan project completed in capstone course (BUSN466-Business Policy) Criteria Target: At least 80% of students will earn 80% or higher</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2016 - 80% of students earned 80% of higher Spring 2017 - 100% of students earned 80% of higher (08/30/2018)</p>	<p>Use of Result: LSB faculty and staff are pleased with the improvement shown, as the LSB fell short of its goal during both the fall 2015 (71%) and spring 2016 (78%) semesters. The instructor of BUSN466 equates the improvement in student performance to the following actions: The instructor spent more time with individual students early in the process to provide guidance and mentorship.</p>

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
problem, or achieving a goal.		<p>Finding Reporting Year: 2017-2018 Goal met: Yes Fall 2017 - 100% of students scored 80% of higher Spring 2018 - 95% of students scored 80% of higher (08/30/2018)</p>	<p>The instructor provided the grading rubric with the syllabus which provided an outline of each section. The grading rubric also provided LSB faculty with data on which sections students need improvement in that can be tied back to course content. (08/30/2018)</p> <p>Use of Result: LSB faculty and staff will review business plan results together at a School meeting each semester during which the instructor can provide feedback on student performance and curriculum adjustments can be discussed. (08/30/2018)</p>

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Curriculum Map
This documentation is relevant to Question number:	Part 2 – Management Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The document summarizes how each of the program's required courses addresses the program's learning objectives.

**Bachelor of Science: Business Administration—Management
Program Learning Objectives**

Learning Objectives: Students will	MGMT 280	MGMT 360	MGMT 365	MGMT 371	MGMT 380	MGMT 451	MGMT 464	MGMT 469	MGMT 476
Learn to guide and direct the organization	L	M		L	H		H		
Be able to set goals and determine how to achieve goals		M			M		H		H
Be able to accomplish goals through the efforts of others by identifying human behavior		L	M		H		H		H
Design effective organization structures		M					M		
Develop and implement control operations	L	M	L	H					
Learn effective decision making processes	L	M		H	M		H		H
Develop effective communication methods	M	M	L	M	H		H		H
Learn about theory and methods used to motivate people		M	M		M		H		H
Develop and practice effective leadership skills		L	L		H		H		M
Design programs to develop people's abilities and talents			M						H
Understand the role and impact of technology on the organization	H	L		H					
Be aware of and respond to diversity challenges both domestically and internationally		M	L				H		
Learn the legal aspects of recruiting, hiring, promoting and discharging people		M	H			H		M	
Demonstrate knowledge of labor law, collective bargaining, and negotiations						H		H	
Understand and apply principles related to incentive programs including compensation			H				M		

L=Low, M=Medium, H=High

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Degree Audit
This documentation is relevant to Question number:	Part 2 – Management Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The degree audit lists the program's requirements in terms of courses, credits, residency and GPA.

Fall 2015

Lukenda School of Business

B.S. In Business Administration – Management Degree Audit

Name _____
 Intended graduation month/year ____ / ____

A# _____
 Advisor Approval _____

Degree Requirements

General Education Requirements

(Minimum 34 credits)

Common Professional Core (48 credits)

ACTG132	4	_____	_____
ACTG133	4	_____	_____
BUSN121	3	_____	_____
BUSN211	3	_____	_____
BUSN231	3	_____	_____
BUSN350	3	_____	_____
BUSN403	3	_____	_____
BUSN466	3	_____	_____
ECON201	3	_____	_____
ECON202	3	_____	_____
FINC341	4	_____	_____
MGMT280	3	_____	_____
MGMT360	3	_____	_____
MGMT371	3	_____	_____
MRKT281	3	_____	_____

Major Requirements (29 credits)

BUSN308	3	_____	_____
BUSN355	3	_____	_____
MGMT365	3	_____	_____
MGMT380	3	_____	_____
MGMT451	4	_____	_____
MGMT464	3	_____	_____
MGMT469	3	_____	_____
MGMT476	4	_____	_____
MATH111	3	_____	_____

Oral & Written Communication (min. 9 credits)

ENGL110	3	_____	_____
ENGL111	3	_____	_____
COMM101,			
COMM201 or	3	_____	_____
COMM225			

Mathematics (minimum 3 credits)

MATH111	3	Satisfied thru major req
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Social Science (minimum 6 credits)*

BUSN121	3	Satisfied thru core course
ECON201	3	Satisfied thru core course

Natural Sciences (w/lab) (minimum 7 credits)*

_____	3-4	_____	_____
_____	3-4	_____	_____

Humanities (minimum 6 credits)*

_____	3-4	_____	_____
_____	3-4	_____	_____

Cultural Diversity (minimum 3 credits)

BUSN308	3	Satisfied thru major req
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***2 courses from different disciplines (subjects) or 2 from interdisciplinary**

Electives (to reach 124 credits)

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

_____ At least 124 credits
 _____ Residency - 30 hours
 _____ 2.0 GPA
 _____ 2.0 GPA in dept'l requiremen

I certify that all departmental requirements are complete and the departmental grade point average is 2.0 or higher.

X

Department Head, Lukenda School of Business 06.22.16

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	MGMT 371 Operations/Business Analytics – Student research project
This documentation is relevant to Question number:	Intellectual Inquiry Question #16
Briefly summarize the content of the file and its value as evidence supporting program review:	Sample student research project, demonstrating student participation in collecting, analyzing and communicating information.

MGMT 371: OPERATIONS AND BUSINESS ANALYTICS

Research Paper on Importance of Employment with College Students

Abstract

Purpose of the Research

The purpose of this research is to conduct an experimental study on what the reasons are behind the importance of employment to student during college. Much research has been done on balancing employment while attending college, but no prior study investigated the motivating factors behind students view on employment while in college with factors including personal fulfillment, gaining job experience, job satisfaction, and financial need. This paper fills the gap in the importance of employment of students during college.

Brief Description of the Data and Methodology

A survey was conducted to collect sample via an email link to Google forms questionnaire. Statistical analysis was performed to develop a multiple regression model on the importance of employment to college students.

Brief Summary of the Findings

The results show that the statistical significance of personal fulfillment, job experience, and financial need factors relating to the importance of employment by college students at LSSU.

Keywords: Personal fulfillment, Job Experience, Financial Need. Statistical analysis

Section 1: Introduction

Importance of the Topic

Many factors contribute to students being employed while being in college. Recently, employment is being pushed by society as an important factor alongside of the college

experience. We are seeking to know and understand the reasons behind the importance of employment to college students.

Lack of Research Studies/Literature

There have been many studies on why students want to maintain employment while attending college. Some reasons for students to be employed include personal fulfillment, gaining job experience, job satisfaction, and financial need. Mounsey, Vandehey & Diekhoff (2013) studied the awareness of student employment. Knouse, Tanner & Harris (1999) showed that there is a better chance of getting hired with job experience. Gutter & Copur (2011) showed the differences in the financial behavior, and financial well-being of students with employment. Robotham (2012) collected data in the United Kingdom showing the consequences of students working part-time in addition to being a full-time undergraduate student. Our survey will help answer the questions on what the importance of employment is while attending college in the United States Midwest region. A literature survey finds no prior study has tested statistical significance of a group of four factors such as personal fulfillment, gaining job experience, job satisfaction, and financial need with regard to our study using the dependent variable involving the importance of employment.

Purpose of the Study

This research attempts to discover the factors behind the importance of employment to students during college. Such variables may include personal fulfillment, gaining job experience, job satisfaction, and financial need.

Brief description of the Methodology

A sampling of college students in the Upper Peninsula of Michigan was done via an online survey questionnaire. A multiple linear regression analysis performing a hypothesis testing will be used.

Outline of Paper

In section 2, a review of prior studies is conducted. Section 3 contains methodology followed by statistical results in section 4. Section 5 discusses managerial implication. The final section, section 6, concludes this study.

Section 2: Literature Review

Roksa (2011) reported on how degree completion in a differentiated system of higher education is related to a student's employment patterns. Students utilizing community colleges and also students who come from lower class family backgrounds have been found to dedicate longer hours to paid employment, which can develop negative consequences for degree attainment.

The use of reported analyses from the National Longitudinal Survey of Youth, taken in 1997, represents the baseline study of results used in this population sample. Original respondents were re-interviewed annually to provide the latest information in 2007. Multiple linear regression was used, as Roska was modeling the relationship between two, or more explanatory variables to a response variable of degree completion.

In relation to our study, this study focuses on degree completion as a dependent variable, whereas our study is about student employment, and the factors associated with being employed. Roska's study does contribute employment status as an independent variable to why degrees are

not attained, but we would like to place more of a focus on why students chose to work overall, with variables that cause them to work.

Forbus, Newbold, & Mehta (2011) conducted a study that relates to traditional and non-traditional students, and how more non-traditional students have been returning to college. Sample data was compiled from a four-year Southwestern State University, which was projectable to the entire student population. Forbus et al. (2011). Variables included motivation for attending college, school/work life balance, feelings of academic stress, and involvement levels with college sponsored activities.

The ANOVA model of analytics was used, as there were 3, or more means (groups, or variables) that were considered to compare for the overall study of differences between the two classes of students. Comparing this study to ours, there are factors related to how students are affected with having to work, and with having not to work. Our study uses different independent variables to calculate reasons for why students choose to work. The study as written by Forbus et al. (2011) is predicated more to just factors located in a different region than where our study will take place.

Jogaratnam & Buchanan (2004) evaluated demands of school and work with employed students in the hospitality industry. Stress is a factor and associated with positive and negative experiences affecting today's college students. The exposure of stress can be a major contributor to attrition from college and/or interfere with the learning ability of college students. Multiple regression analysis studied hassles (stressors) that affected college student in comparison to the hours worked each week, GPA, and possibly the number of jobs held by a student. Because research has established how stress can affect academic performance, Jogaratnam et al (2004) wanted to specify how working hospitality industry students in the Great

Lakes region would be affected by the stressors as they currently studied in hospitality programs at college.

Having employment status as our dependent variable, we are using different variables to study why students feel they should, or want to work. Jogaramam et al (2004) had a specific focus on one particular group of students in the Great Lakes region. Our study could include some of these hospitality program students, working in a hospitality industry, yet is not going to limit our variables to just that one group of students.

Following another aspect of student employment, Sallop & Kirby (2007) reported on graduating business students to gain information relating to the effects of gender and work experience on the variables of salary expectations, career expectations, expected hours required and willingness to work, internship participation, and sensitivity to gender issues. Sample data was collected from graduating students from a Southwestern University. T-tests were used to determine if the means of different variables were statistically different between graduating male and female students, Sallop et al (2007). Regression analysis was used when work experience was calculated as the independent variable.

This study showed an analysis to reveal that graduating business students have similar salary expectations as they move forward in searching for work in a professional environment. Our study uses independent variables of why students would work during their career, with gaining job experience as one variable to contribute to making a decision to work while attending college. This study limits itself to graduating business students, and our study will focus on a larger student demographic, regardless of their program of study.

Moving into more financial expectation research, Gutter & Copur (2011) studied the relationship between financial behavior and financial well-being of college students. Using 15

college campuses in the United States, and collecting data from college students ages 18 and above, their means comparisons showed significant differences regarding the financial well-being of students using various socioeconomic factors and financial behaviors. Among the variables studied and included in the analysis were demographic variables (gender, race, school rank, and marital status), financial variables (monthly debt amount, financial aid, student loan amounts), and financial education. Financial education refers to were the students taught about personal finances, and at what point in their life did they complete such education regarding financial education. Independent sample t-tests were used to compare mean values of independent variables and OLS (Ordinary Least Squares) Regression analysis was used to determine interrelationships between IFDFW (Incharge Financial Distress/Financial Well Being) scale and financial behaviors. Gutter et al. (2011). Hypothesis tests used t-tests, and ANOVA procedures as well.

Using employment status as our main dependent variable, we are conducting the study to ascertain why students work while in college. The study by Gutter et al. (2011) portrays a group of students who essentially have difficulty for specific reasons handling money while in college, and can apply to one of our independent variables pertaining to why students we will survey want to, or are forced to work. The study by Gutter et al. also covers a more National level of students with specific variables pertaining to financial well-being. Our study would not focus specifically on financial well-being, but uses that variable to conduct a survey to combine with our specific variables to the student employment decisions found on our campus locally.

Ehrenberg & Sherman (1987) studied how male student's employment while in college impacted their GPA, their determination to continue to be enrolled in school, also well as study their decision to enroll in graduate school and their post college employment success. The study

took data from the National Longitudinal Survey of High School Class of 1972 and used a simple static family utility-maximization model to analyze the data. The results of this study concluded that part-time work did not show a negative effect on the student's GPA, but it did reduce the probability the student would enroll in school the next year. Whether the student worked on or off campus was a significant factor in the student enrollment. The study found that students that worked on campus had little to zero impact with enrollment and determination to continue to be enrolled in school. While off campus employment seemed to impact enroll and delay graduation. Post college earnings did not seem to be related to the hours worked during the week, but did show that the student's GPA seemed to directly impact the student's post college earnings. This study is different than ours as we are studying the student's views of the importance of employment while in college. While this study looks at the short and long term impact of employment in male college students, this study does relate to ours given that the study showed no relation to post college earnings to the number of hours a student work. We are looking to uncover if students feel employment is important while in school with our variable being to gain experience. Students may feel that gaining experience may benefit them post college with their earning potential when this study showed that working hours did not have any relationship to their post earning potential.

Gainey, Barnett, Davis, Bell & Curvino (2013) surveyed a sample population of students with a large population of non-traditional students at a Southeast University studying temporary employment pertaining to college students. Two separate surveys were distributed to the student based on whether they have had temporary employment, or not while in college. Both used the Likert scale, and T-testing to analyze the data. The study used the demographics variables such as gender, age, and race. One of the results were that many respondents viewed working for a

temporary agency as a way to start their career. This relates to our study, as we are using the independent variable of gaining job experience as this study did, with the exception that we are looking at all types of job experience, not only through a temporary agency.

Knouse, Tanner & Harris (1999) studied the relationship of business college internships to college performance, and job opportunities after graduation. The study took a sample of alumni who graduated from a University's Business Administration College between the spring of 1993-1997. Each respondent completed a survey at graduation and six months later. The average age of the respondents was 25. To analyze the data T-test and chi-square utilized SPSS. Their results showed that internships increase job offers upon graduation, and students that held internships had a higher cumulative GPA compared to those who had no internship. Our study can relate to this study, as our dependent variable is importance of employment, and looking at the independent variable of gaining experience. This study showed that students should place value on having an internship to gain experience while in college to increase the opportunities of job placement upon graduation.

Using data from the National Longitudinal Survey of Youth, Sampson (2001), examined that short and long term effects of females working while in college, how employment affected the time it took to achieve a degree, and how children in the home impact a women's decision to work. Focusing on short and long term effects of working while in college, the study looked at the income earnings from two, and five years after obtaining a degree. By using Ordinary Least Squares earning regressions, the study was able to determine the influence of explanatory variables that included ability, attitude, education, work experience, children in the home, and personal characteristics (Sampson 2001). The data showed, at the two year mark, women working about 15 hours per week while in college did not have a significantly higher income

than those that did not work while in college. Five years after obtaining their degree, those that worked did have a significantly higher income than those who did not work while in college. One of our study's independent variables is gaining job experience, which links to students seeking to find if they feel that being employed while in college is important to gaining job experience. As this previous study took it one step beyond, they wanted to know if having job experience in college would have a long term effect on post-graduation earnings in the female population.

Contrary to popular belief, their data did uncover that part-time students in the low income group had the smallest percentage of workers being employed greater than 20 hours a week compared to students in the middle and high income groups. This pointed out that working for financial need alone is not the only motivator to working while in college. Our study is looking at financial need as a motivator of being employed while seeking higher education, as well as the economic background of the student. We are seeking to see if there is a relationship between students coming from a lower economic status viewing the importance of work and financial need from those with a middle, or high economic background.

The data collected from Robotham (2012) in the United Kingdom studied the consequences of students working part-time while being in a full-time undergraduate program. The study found students reporting an increase in positive outcome in relations to having part-time employment. The data showed that studying became less important to the students that were working higher hours in a part-time job. A sample of the university students was used. The demographic variables that this study used were major, faculty, age, gender, ethnicity, and financial status.

The study found like other studies before it, that a majority of full-time students have part time employment. The study used the dependent variable of prevalence of part-time employment with full-time classes. The independent variables included the effects of stress, the impacts, and the student's ability to combine academic study with employment. That data concluded that 67% of the full-time undergraduate students had a part-time job with 12% having more than one part-time job. There was a significant correlation between the year of study and part-time employment. It found that students in their second, or final year of school were more likely to have a part-time job.

Of those that had part-time employment, 32% worked to maintain a desired standard of living, and 15% did so to aid in not having to borrow money. Our study is also focusing on the financial need to students seeking employment. Their study showed less than 1% of the sample worked in their course of study. This was a very interesting finding as it would be thought that students seeking employment would do so to enhance their employability after graduation in their chosen field of study. This study relates to ours as gaining experience is one of our independent variables.

Kantamneni, Shada, Conley, Hellwege, Tate & Wang (2016) reported that traditional models of career planning often only include individuals who are legal citizens and have access to career development structures. These assumptions are not suited for individuals who are undocumented due to legal and systemic barriers. Students who are undocumented do not always have the chance to pick a job that fits well with their beliefs or is based on their own interests and goals. This study used a multiple case study approach, which investigated how academic and work-related decisions were made for two undocumented citizenship status college students. The participants were recruited in two different methods: through student college

organizations and snowball sampling (e.g., word of mouth). The variables studied included undocumented college students, Latina ethnic group, and raised in single-parent homes by their mothers. The analytical model used was data analysis in three steps including cross-case analyses, which identified noticeable themes across cases by recognizing consistencies and patterns. Our study can relate to this study, as our independent variables are similar and both use variables that link to employment.

Larkin, LaPort & Pines (2007) studied the relationship between job choices, relevance, and satisfaction of the job for students 20 yrs., 20-24 yrs., and over the age of 25. It was revealed in the results that there were significant differences between age groups in their reasoning for job choices, which reaffirmed a positive connection from past research that was between job satisfaction and relevance. It was emphasized that it is important to choose employment based on career-oriented reasons and not for convenience. This study sampled freshman through senior college students with a short Student Jobs Survey, which was gathered by commercial software and redirected the data into an SPSS database for analysis. The study had three types of measures: Career Relevance, Motivation, and Job Satisfaction. Both the motivation and job satisfaction used the Likert-type scale ranging from 1-5. The study conducted a one-way analysis of variance (ANOVA) for each reason for choosing a job, and age as the independent variable. Our study relates to this study as our demographics both include gender and age, and our independent variables both look at job satisfaction. Both studies also use the Likert-type scale for rating.

Heckert, Droste, Farmer, Adams, Bradley & Bonness (2002) investigated the differences in gender and work experience relating to the importance of job characteristics. It was predicted that women would rate the importance of family life accommodations and pleasant working

conditions higher than men would. The variables studied were graduating seniors and alumni from mid-sized Midwestern public universities, gender, race (which mainly consisted of Caucasian at 95.2%), and age. The hypotheses that women would give job accommodations to family life and pleasant working conditions a high importance rating was supported. Our survey relates to this survey with similar demographics including age and gender. Our independent variable job satisfaction was an independent variable in this study.

Mounsey, Vandehey & Diekhoff (2013) explored three differences between working and non-working students. They issued a job questionnaire to determine the perceptions of student employment. The study indicates that there are four reasons students work, which include opportunity, previous employment experience, necessity, and financial worries after graduation. The demographics included in this study were age, gender, student status, major, and classes (full-time, part-time, missing). They also listed work-related demographics including employment, during college and/ or high school, job choices, and more. The last section of the survey was about benefits of working, problems with working, and personal statements that were measured on the Likert-type 5-point scale. Our studies are related with similar demographics and independent variables including financial need, personal fulfillment, job satisfaction and gaining job experience.

Kalenkoski & Pabilobia (2010) studied the financial motivations for and the effects of employment on the academic performance of college students in the United States. It was found that the data confirmed predictions of the theoretical model that the amount of hours spent working while in school increased with lower parental help and greater cost of attendance. Both part-time and full-time students were included in the sample. The variables included four-year students and two-year students along with worked/not worked, hours worked, parental help

received, age, race, gender, and more. The three key dependent variables used were parental help, number of hours worked per week, and GPA. The study used a simple, stylized theoretical model. This study related to our study in terms of our dependent variable and independent variables. One of the dependent variables in this study linked to our independent variable financial need.

Holmes (2008) investigated why students work during college, what influences their choice of employment, and the student's perception of their ability to balance work and school. Only first and second year students were surveyed, ages ranged from 17-22 years old. The findings include the major reason for employment among college students was to cover their day to day spending needs. Only 5% of student's primary reason for gaining experience for their future career path. This study relates to our study with regard to our independent variables financial need and gaining experience for the future.

Robotham (2009) reported on a study performed using students employed part-time at a University in the U.K. These students were used to ascertain the possible consequences of being a full-time student and working part-time. Factors of stress, self-confidence, motivation, and communication skills were assessed to compile results in correlation with the student's abilities to work and remain tactful as a full-time student. Sample data used did show positive effects for working while attending school full-time, but the negative effects did alter the success of those students, as the stress created from employment responsibilities hindered the performance of the student's academics.

Variables in this study relate to how working as a college student could affect the overall performance of studies and can be associated with our study in the sense that students may, or may not want to work, yet sometimes have reasoning to why they do. Our variables apply to

positive aspects of student employment, and this study is viewing how our independent variables can be associated to our dependent variable in a negative way.

Lucas & Ralston (1997) examined the part-time employment of university students during the school year. They analyzed the data by age and gender. One thing that they found was that young female students were most likely to work than young males. The study was done using a survey of two groups of students in a university. The purpose was to obtain as much information as possible about student employment. Similarly it could be expected that the financial circumstances of school and university students would be different with university students having a greater financial need to work given the decline in value of mandatory grants since the mid-1980s (Foster, 1994; *The Guardian Education*, 1994; Thomas, 1994; Ward and Meikle, 1993). The study showed the major reason for student's working were due to finances. This relates to our study on employment status for financial need.

Beerkens, Mägi & Lill (2011) conducted a population proportion from Estonian public and private universities to see the reason behind why students worked. The study shows that students that are from privileged families are just as likely to work as poorer families, and are even more likely to get a full-time job. In addition, in Estonia takes pride in being a leader in student employment, and those who work are perceived by others in the community as capable and ambitious. Working on campus has a zero effect, to a positive effect on the student, compared to someone who works off campus. This study uses a data analysis regression table. This relates to our study on employment status for financial need and gaining job experience.

O'Connor & Cordova (2010) focused on students who are working full-time and going to graduate school part-time. The students who have a strong social and family support is reported to feel less stress than those who don't have strong social and family support systems. The

working adult students who return to a university part-time go in with the expectations that what they learn will enhance their knowledge for their work field. Some of them return because they need to have a degree, or credential in order to keep their present job, or get the job they are desiring. This relates to our study on employment status for financial need and job satisfaction.

In summary, there are many studies that focus on employment as a whole in various college settings. Many of the studies focused more on the after effects and academic performance, rather than the importance to students overall. There are many that show job satisfaction and financial need as key components to deciding on employment while pursuing higher education. However, no study was found to involve all four variables linked to the importance of employment. This study proposes a framework for the importance of employment to college students while correlating to the four factors of gaining job experience, job satisfaction, financial need and personal fulfillment. Thus, this paper hypothesizes that the importance of employment will give us an inside view of college students minds.

Section 3: Methodology

Part I- Variables and Hypotheses

In a study conducted on students employed part-time at a University in the U.K, self-confidence, which coincides with personal fulfillment levels, found 68% of students holds at least one part-time job during the term-time, and that most of the students are employed with at least ten hours per week (Robotham 2009). Some studies show that employment can have negative consequences with students missing class, doing less in class, and experience higher levels of stress. The study shows that working part-time could have negative consequences, unless working supports personal fulfillment, using self-confidence as one of the independent variables.

Hypothesis 1: Personal fulfillment is significantly related to importance of employment for students.

Survey Question/ Statement 1: Employment in school will make me feel more confident. *1 =Strongly Disagree..... 5 =Strongly Agree*

Survey Question/ Statement 2: Achievement in balancing employment and college is satisfying to me. *1 =Strongly Disagree..... 5 =Strongly Agree*

This study (Gainey, Barnett, Davis, Bell & Curvino 2013) concluded that many students viewed working for a temporary agency as a way to start their career. Another showed results that students should place value on having an internship to gain experience for more job opportunities upon graduation (Knouse, Tanner & Harris 1999). Accordingly, this research hypothesized that if gaining experience in college has positive outcomes, students will tend to view gaining job experience with having a significant relationship to importance of employment.

Hypothesis 2: Gaining job experience is significantly related to importance of employment for students.

Survey Question/ Statement 1: Employment options during college will help me gain experience after graduation. *1 =Strongly Disagree..... 5 =Strongly Agree*

Survey Question/ Statement 2: Gaining job experience prior to graduating is important to me. *1 =Strongly Disagree..... 5 =Strongly Agree*

According to this study (Heckert, Droste, Farmer, Adams, Bradley & Bonness 2002), it was concluded that women rated pleasant working conditions highly with regards to the importance of job characteristics. Therefore, this research hypothesized that if job satisfaction is important, women in college will tend to view it with having a significant relationship to the importance of employment. Another showed results (Larkin, LaPort & Pines 2007) of the

significant difference between the age groups and their reasoning for job choices, which reinstated a positive connection from past research between job satisfaction and relevance. It is important to choose employment based on career-oriented reasons and not for convenience.

Hypothesis 3: Job satisfaction is significantly related to importance of employment for students.

Survey Question/ Statement 1: Job satisfaction would keep me employed. *1*

=Strongly Disagree..... 5 =Strongly Agree

Survey Question/ Statement 2: Job satisfaction encourages timely accomplishments

of tasks. *1 =Strongly Disagree..... 5 =Strongly Agree*

Many studies argued that financial need was a very important factor in choosing employment while in college (Sampson 2001, Roska 2011, Kalenkoski & Pabilobia 2010, Holmes 2008, Beerkens, Mägi & Lill 2011, Robotham 2012). Therefore, this study hypothesizes that financial need has a significant relationship with importance of employment to students.

Hypothesis 4: Financial need is significantly related to importance of employment for students.

Survey Question/ Statement 1: Employment is required to cover daily living

expenses. *1 =Strongly Disagree..... 5 =Strongly Agree*

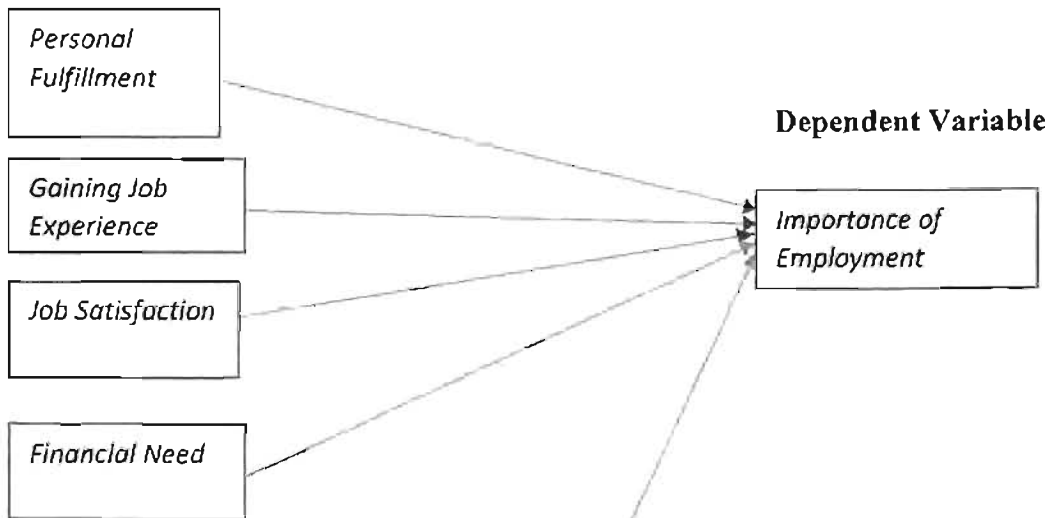
Survey Question/ Statement 2: Working during college to cover tuition expenses is

important to me. *1 =Strongly Disagree..... 5 =Strongly Agree*

Part 2- Research Framework

Main Variables (Continuous Measurement)

Independent Variables



Demographic (categorical) Variables

- *Enrollment Status- P/F Time*
- *Economic Status- Lower, Middle, Upper Class*
- *Age*
- *Gender*

Part 3- Analytical Model

This study proposes to build an importance of employment model. This research uses a multiple regression model. In the model, the dependent variable is "Importance of Employment," while "Personal Fulfillment, Gaining Job Experience, Job Satisfaction, and Financial Need" are independent variables.

We will be using t-Test and Anova test to determine whether groups identified from the demographic variables have different results in determining the importance of employment. For example, we will answer the question, "Are there differences in a student's view of importance of employment because of economic status?" Our survey question/statement for importance of employment is, "Overall, I feel that employment while in college is important, 1- Strongly disagree...5- Strongly Agree."

In summary, most of the studies did not directly study our dependent variable importance of employment to students, as we are seeking to uncover if college students feel it is important for them to work while in school, and their reasons behind why they feel it is important. Holmes (2008) searched for the answer why students work during college and what influences their choice to be employed. Holmes found that the major reason for students to be employed in college was for financial reasons, mostly to cover their day to day financial needs. Only a small percentage said their primary reason for working was to gain experience.

Part 4- Sampling Plan

We will sample 50-75 Lake Superior State University students from a total population of approximately 2,100 students. Surveys will be distributed to students via a link attached to an email. Data collection will take place over a two-week period beginning in the month of March, 2017.

Part 5- Survey Questionnaire

Questionnaire

This survey research project is being conducted for **MGMT 371: Operations and Business Analytics**. We are gathering data from Lake Superior State University students to help us determine the factors that influence, or predict the importance of employment. We will run statistical analysis on the results.

Please do not write your name on the survey. The survey responses are **anonymous** and will remain **confidential**. By completing this survey, you are consenting to participating in this research project. Participation is voluntary. The survey will take approximately 2-3 minutes to complete.

Thank you for your participation in this survey.

1 = *Strongly Disagree* ←————→ 5 = *Strongly Agree*

	1	2	3	4	5
Personal Fulfillment					
1. Employment in school will make me feel more confident					
2. Achievement in balancing employment and college is satisfying to me					
Gaining Job Experience					
3. Employment options during college will help me gain experience after graduation					
4. Gaining job experience prior to graduating is important to me					
Job Satisfaction					
5. Job satisfaction would keep me employed					
6. Job satisfaction encourages timely accomplishments of tasks					
Financial Need					
7. Employment is required to cover daily living expenses					
8. Working during college to cover tuition expenses is important to me					
Importance of Employment					
9. Rate the importance of working while attending college					

IMPORTANCE OF EMPLOYMENT WITH COLLEGE STUDENTS

1. Enrollment Status: Part-time
 Full-time

2. Economic Status: Lower Class (<\$30,000 per year)
 Middle Class (\$30,000- \$90,000 per year)
 Upper Class (>\$90,000 per year)

3. Age: <20 Years old
 20-30 Years old
 31-40 Years old
 41-50 Years old

4. Gender: Female Male

Section 4: Results

Out of 2,100 students, 50 questionnaires were returned from the first survey request, which results in a .024% response rate. Frequency tables show that out of 50 responses, 82% of students were female and 18% were males. Of these 50 students, 20% were part-time students and 80% were full-time students.

The age groups of the students were as follows: 28% were under the age of 20 years old, 62% were in the age range of 20 to 30 years old, 6% were in the age range of 31 to 40 years old, and 4% were in the age range of 41 to 50 years old.

Students were also surveyed on their economic status. As the results show, 80% have an income of less than \$30,000 per year, 18% have an income between \$30,000 and \$90,000, and 2% have income above \$90,000.

Gender by enrollment crosstab variables found a significantly higher percentage of females attending school on a fulltime basis. This significance is surprising because in our society, women are viewed inferior to men regarding education and high career advancement. Another interesting observation includes how women usually consider career options over attending college on a fulltime basis.

Using a two independent sample t-Test assuming using unequal variances it was found that female ratings of importance of employment is not significantly different than male ratings of importance of employment based on a two-tailed p-value of 0.075, which is greater than alpha (0.05). This indicates that the data supports the null hypothesis and the research hypothesis is rejected and the null hypothesis is accepted.

The single factor ANOVA test finds that all population means are equal based on the p-value of .113, which is greater than alpha (0.05). This indicates the rejection of the research

hypothesis and acceptance of the null hypothesis. There is statistically not a significant difference between the age groups as determined by one-way ANOVA [$F(3,46) = 2.10446, p = 0.113$].

The multiple regression analysis model estimates the linear multiple regression equation, which is $-2.71 + 0.31x1_1 + 0.06x1_2 + 0.01x2_1 + 0.64x2_2 + 0.12x3_1 - 0.06x3_2 + 0.42x4_1 + 0.03x4_2$. Adjusted R^2 equals .591, which indicates that 59.1% of the variation in the importance of employment is explained by the overall regression equation. The overall regression equation is significant because the p-value is $1.60005E-07$, which is less than alpha (0.05). The model indicated that personal fulfillment 1, gaining job experience 2, and financial need 1 are significantly related to the importance of employment because the p-values are less than alpha (0.05). Five independent variables: personal fulfillment 2, gaining job experience 1, job satisfaction 1, job satisfaction 2, and financial need 2 were removed because their p-values are all greater than alpha (0.05) indicating the variables did not improve the model. Independent variable factors show no serious multicollinearity in the model.

The multiple regression analysis (reduced) model indicated that the new linear multiple regression equation is $-2.14 + .35x1_1 + .64x2_2 + .41x4_1$. The new adjusted R^2 is .618, which indicates that 61.8% of the variation in the importance of employment is explained by the overall regression equation. There is a minor increase in the adjusted R^2 of .027 between the multiple regression analysis model and the reduced model, showing that removing the five variables stated above improved the accuracy of the reduced model. The new overall regression equation is significant because the p-value is $2.61175E-10$, which is less than alpha (0.05). This concludes that all the independent variables in the reduced model being tested, personal fulfillment 1, gaining job experience 2, and financial need 1, are significant.

Section 5: Discussion

Part 1- Comparison between our findings and prior studies

In a study by Robotham (2009) University students employed part-time had higher levels of self-confidence, which associated with their personal fulfillment while maintaining part-time jobs. The study conducted with LSSU students determined that the level of personal fulfillment is significantly related to the importance of employment regarding making students feel more confident. As the t-Test shows, the association of male ratings and female ratings proved to be not significantly different, and correlates with the Robotham (2009) study because students valued personal fulfillment as important for employment success.

The paper found a statistical significance of gaining job experience in relation to importance of employment while in college, which was consistent with Knouse, Tanner & Harris (1999) and Gainey, Barnett, Davis, Bell & Curvino (2013). Students viewed gaining job experience prior to graduating as important. Knouse, Tanner & Harris (1999), concluded students should value interning during college to have more job opportunities after graduation. Gainey, Barrett, Davis, Bell & Curvino (2013), showed many students viewed working for a temporary agency as a way to start their career. Based on the findings of our study, gaining real world job experience is important to students prior to graduating. The data could have shown such results because students have been taught that gaining experience by interning can lead to more job opportunities after college.

Heckert et. al (2002) conducted a study that related pleasant working conditions involving women to their relationship with importance of employment. The significant relationship revealed in the Herkert et. al (2002) study does not compare to ours, as our survey did not conclude that the job satisfaction was significantly related to Lake Superior State

University college students. College students may view this time as only a short term event in their lives and job satisfaction isn't on their minds at this time. This could have attributed to the results of the survey conducted at Lake Superior State by not being significantly related to the dependant variable regarding importance of employment.

Many studies revealed that financial need was an important factor in choosing employment. One such study performed by Sampson (2001) found a significant relationship with the importance of employment. It's no surprise that the Lake Superior State University study conducted showed a significant relationship between financial need and importance of employment. The study supported the statement that the employment was required to cover daily living expense. It did not support the statement that working during college was important to cover tuition expenses, concluding that students are working for everyday living needs while in college.

Part 2- Managerial implications

Working while in college can have positive benefits for the college student. The student can gain confidence from employment, have the cost of everyday living expenses met, and gain positive job experiences. Through the study, it was discovered that job satisfaction did not influence our dependant variable regarding the importance of employment while attending college. Employers can benefit from this knowledge when marketing and offering employment to college students. This aids managers to appeal to the college student, College students aren't looking for a job that is going to bring them job satisfaction. They are looking for a job that will teach them the skills they need to be able to be marketable after graduation.

Managers should allocate their company's financial resources differently when considering college students for employment. Costs associated with offering college students standard benefit packages may be a waste of resources. College students prefer gaining work

experience, therefore, managers should allocate more financial resources to teaching and training, as that is what is desirable to the college student. We also conclude that students at Lake Superior State University prefer employment to sustain immediate financial needs, and not future financial needs associated with potential career choice.

Section 6: Conclusion

Part 1- Brief Summary

This study has shown how Lake Superior State University college students are fulfilled to be employed for reasons involving factors of job satisfaction, job experience, and financial need. However, the factors of fulfillment associated with confidence, job experience associated with options after school, and financial need to cover current tuition expenses were not significant to the overall importance of employment. Other factors such as enrollment status, economic status, gender and age have affected the variables of personal fulfillment, gaining job experience, job satisfaction and financial need.

Part 2- Direction for future study and limitations of your study.

Future studies on this subject should further investigate the factors associated with employment while attending college using a larger population size. The limitations of this study include population sample size and also limited questions in the actual survey given to the population sampled. In the future, a larger population sample size would benefit the investigation to determine if the findings were consistent between Lake Superior State University and other universities nationwide.

Part 3- Conclusion

The study considered variables that could contribute to the importance of employment. Research obtained provides adequate results of a significant relationship between factors of

gaining experience, and financial need in relation to students view of importance of employment. In comparison to literature reviews, many similarities were discovered with studies conducted on other college campuses regarding employment. We could not make inferences about the general population of college students and the importance of employment because of convenience sampling. The study did contribute to existing literature on the factors that influence the importance of employment. Evidence suggests that students seek employment to gain experience and to cover financial obligations while attending college. This is beneficial for employers to understand further how to maintain student employees and better utilize student workers. In turn, student employees seek the benefits of compensation and experience to promote successful careers after graduation.

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IMPORTANCE OF EMPLOYMENT WITH COLLEGE STUDENTS

Variable Description

id	Gender	Age	Enroll	Econ Status	Full_1	Full_2	Exp_1	Exp_2	Sat_1	Sat_2	Need_1	Need_2	Import					
1	0	2	1	1	5	5	5	5	5	5	5	5	5	1	5	gender	Exp_2	Importance
2	0	0	1	0	4	5	5	5	5	5	3	5	5	1	0	(0) Female	(1) Strongly Disagree	(1) Strongly Disagree
3	0	1	1	0	5	5	5	5	5	5	5	5	5	1	1	(1) Male	(2) Disagree	(2) Disagree
4	0	1	1	0	4	3	2	2	5	4	4	2	2			(3) Neutral	(3) Neutral	(3) Neutral
5	0	1	1	2	4	3	4	5	5	4	2	2	3			(4) Agree	(4) Agree	(4) Agree
6	0	0	1	0	4	3	5	5	5	4	3	3	3			(5) Strongly Agree	(5) Strongly Agree	(5) Strongly Agree
7	0	1	0	0	2	3	4	4	4	3	5	4	4			(1) 20-30 Years Old		
8	0	1	1	0	3	4	4	5	4	5	5	4	4			(2) 31-40 Years Old	Sat_1	
9	1	0	1	1	5	5	5	5	4	5	5	5	5			(3) 41-50 Years Old	(1) Strongly Disagree	
10	1	0	1	1	3	5	4	5	5	5	5	3	4			(2) Disagree	(2) Disagree	
11	0	1	1	0	4	4	4	4	4	5	1	4	4			Enrollment Status	(3) Neutral	
12	0	1	1	0	4	5	4	4	5	5	4	3	4			(0) Part-time	(4) Agree	
13	1	1	1	0	5	4	5	5	5	5	1	1	3			(1) Full-time	(5) Strongly Agree	
14	0	1	1	0	3	3	4	3	5	5	5	3	3					
15	0	1	1	0	1	3	1	4	4	2	5	4	4			Economic Status	Sat_2	
16	0	1	1	0	1	1	1	5	1	5	5	2	3			(0) <\$30,000 per year	(1) Strongly Disagree	
17	0	1	1	0	3	2	4	5	5	5	4	3	3			(1) \$30,000-\$90,000 per year	(2) Disagree	
18	0	1	1	0	4	5	5	5	2	4	5	1	4			(2) >\$90,000 per year	(3) Neutral	
19	0	0	0	0	4	5	5	5	5	4	5	5	5				(4) Agree	
20	0	0	1	0	4	5	4	5	3	3	5	5	4			Full_1	(5) Strongly Agree	
21	1	1	1	0	4	3	4	4	5	4	5	4	3			(1) Strongly Disagree		
22	0	2	1	1	5	5	5	5	5	5	5	5	5			(2) Disagree	Need_1	
23	1	1	1	0	4	5	5	5	4	5	4	5	3			(3) Neutral	(1) Strongly Disagree	
24	0	0	1	0	4	4	4	4	4	4	5	5	3			(4) Agree	(2) Disagree	
25	0	1	1	0	3	5	3	4	4	3	5	4	3			(5) Strongly Agree	(5) Strongly Agree	
26	0	1	1	0	5	4	4	5	5	5	5	5	5				(4) Agree	
27	1	1	1	0	2	4	4	4	4	1	1	2	1			Full_2	(5) Strongly Agree	
28	1	2	0	1	4	4	3	3	5	5	5	4	3			(1) Strongly Disagree		
29	0	0	1	0	4	5	4	5	5	5	4	3	3			(2) Disagree	Need_2	
30	0	1	0	0	2	5	5	5	5	4	4	5	2			(3) Neutral	(1) Strongly Disagree	
31	0	1	1	1	4	5	5	5	5	5	1	3	5			(4) Agree	(2) Disagree	
32	0	1	1	0	3	4	3	5	5	3	4	4	4			(5) Strongly Agree	(3) Neutral	
33	0	1	1	1	3	4	1	5	5	4	3	4	4				(4) Agree	
34	1	1	1	0	2	4	5	5	5	4	4	3	4			Exp_1	(5) Strongly Agree	
35	0	1	1	0	4	5	1	3	5	5	4	4	3			(1) Strongly Disagree		
36	0	3	0	1	4	4	4	4	4	4	4	4	4			(2) Disagree		
37	1	3	0	0	2	3	3	3	5	5	2	1	1			(3) Neutral		
38	0	1	1	0	4	5	4	4	5	5	5	4	4			(4) Agree		
39	0	1	1	1	3	2	4	5	5	5	4	5	4			(5) Strongly Agree		
40	0	1	1	0	5	5	5	5	5	5	5	1	5					
41	0	1	0	0	4	5	5	5	5	5	5	5	5					
42	0	0	1	0	3	3	3	4	4	3	4	2	3					
43	0	0	1	0	4	4	4	5	4	4	5	5	5					
44	0	0	0	0	4	2	3	5	4	4	5	3	4					
45	0	0	1	0	3	3	4	5	4	3	4	4	4					
46	0	1	1	0	4	5	4	4	4	4	4	4	4					
47	0	0	1	0	3	3	5	5	4	3	3	3	4					
48	0	1	0	0	3	2	2	5	5	5	5	5	4					
49	0	1	1	0	3	4	2	5	5	5	5	5	4					
50	0	0	0	0	5	5	5	5	5	5	5	5	5					

Gender Frequency

Count of Gender	
Gender	Total
Female	82.00%
Male	18.00%
Grand Total	100.00%

Age Frequency

Count of Age	Age				Grand Total
	< 20 years old	20 - 30 years old	31 - 40 years old	41 - 50 years old	
Total	28.00%	62.00%	6.00%	4.00%	100.00%

Enrollment Status Frequency

Count of Enroll	
Enroll	Total
Part-time	20.00%
Full-time	80.00%
Grand Total	100.00%

Economic Status Frequency

Count of Econ Status	Econ Status			Grand Total
	< \$ 30,000 per year	\$30,000 - \$90,000	> \$90,000	
Total	80.00%	18.00%	2.00%	100.00%

Crosstab Gender by Enrollment

Count of Enroll	Enroll		
Gender	Part-time	Full-time	Grand Total
Female	16.00%	66.00%	82.00%
Male	4.00%	14.00%	18.00%
Grand Total	20.00%	80.00%	100.00%

Crosstab Gender by Age

Count of Age	Age				
Gender	< 20 years old	20- 30 years old	31- 41 years old	41 - 50 years old	Grand Total
Female	24.00%	52.00%	4.00%	2.00%	82.00%
Male	4.00%	10.00%	2.00%	2.00%	18.00%
Grand Total	28.00%	62.00%	6.00%	4.00%	100.00%

Crosstab Gender by Economic Status

Count of Econ Status	Econ Status			
Gender	< \$30,000 per year	\$30,000 - \$90,000 per year	> \$90,000 per year	Grand Total
Female	68.00%	12.00%	2.00%	82.00%
Male	12.00%	6.00%	0.00%	18.00%
Grand Total	80.00%	18.00%	2.00%	100.00%

Crosstab Age by Enrollment

Count of Enroll	Enroll		
Age	Part-time	Full-time	Grand Total
< 20 years old	6.00%	22.00%	28.00%
20 - 30 years old	8.00%	54.00%	62.00%
31 - 40 years old	2.00%	4.00%	6.00%
41 - 50 years old	4.00%	0.00%	4.00%
Grand Total	20.00%	80.00%	100.00%

IMPORTANCE OF EMPLOYMENT WITH COLLEGE STUDENTS

Crosstab Age by Economic

Count of Econ Status	Age				
Econ Status	< 20 years old	20 - 30 years old	31 - 40 years old	41 - 50 years old	Grand Total
< \$30,000 per year	24.00%	54.00%	0.00%	2.00%	80.00%
\$30,000 - \$90,000 per year	4.00%	6.00%	6.00%	2.00%	18.00%
> \$90,000 per year	0.00%	2.00%	0.00%	0.00%	2.00%
Grand Total	28.00%	62.00%	6.00%	4.00%	100.00%

Crosstab Enroll by Economic

Count of Econ Status	Enroll		
Econ Status	Part-time	Full-time	Grand Total
< \$30,000 per year	16.00%	64.00%	80.00%
\$30,000 - \$90,000 per year	4.00%	14.00%	18.00%
> \$90,000 per year	0.00%	2.00%	2.00%
Grand Total	20.00%	80.00%	100.00%

Anova Results

Anova: Single Factor

SUMMARY

Groups	Count	Sum	Average	Variance
< 20 years	14	57	4.071428571	0.686813187
20-30 years	31	113	3.64516129	0.903225806
31-40 years	3	13	4.333333333	1.333333333
41-50 years	2	5	2.5	4.5

ANOVA

Source of Variation	SS	df	MS	F	P-value	F crit
Between Groups	5.928	3	1.975995904	2.104458828	0.11263	2.806845
Within Groups	43.192	46	0.938956789			
Total	49.12	49				

IMPORTANCE OF EMPLOYMENT WITH COLLEGE STUDENTS

T-Test Gender Against Importance

t-Test: Two-Sample Assuming Unequal Variances		
	Female- Importance of Employment	Male- Importance of Employment
Mean	3.926829268	3
Variance	0.719512195	1.75
Observations	41	9
Hypothesized Mean Difference	0	
df	9	
t Stat	2.012975293	
P(T<=t) one-tail	0.037483632	
t Critical one-tail	1.833112933	
P(T<=t) two-tail	0.074967264	
t Critical two-tail	2.262157163	

Ho: $\mu_1 = \mu_2$ Female ratings of importance of employment is not significantly different than Males ratings of importance of employment
 H1: $\mu_1 \neq \mu_2$ Female ratings of importance of employment is significantly different than Male ratings of importance of employment

If p-value $\leq \alpha = 0.05$, Reject Ho.
 P-value (two-tail) = .075 > α , Do Not Reject Ho (Ho is true)

Regression Analysis Overall

SUMMARY OUTPUT								
Regression Statistics								
Multiple R	0.811360651							
R Square	0.658306106							
Adjusted R Square	0.591634127							
Standard Error	0.639817124							
Observations	50							
ANOVA								
	df	SS	MS	F	Significance F			
Regression	8	32.33599595	4.041999493	9.873804765	1.60005E-07			
Residual	41	16.78400405	0.409365953					
Total	49	49.12						
	Coefficients	Standard Error	t Stat	P-value	Lower 95%	Upper 95%	Lower 95.0%	Upper 95.0%
Intercept	-2.71361352	0.95348618	-2.843893889	0.00692081	-4.637217924	-0.786009115	-4.637217924	-0.786009115
Full_1	0.305630333	0.126064978	2.424387313	0.019828775	0.051036945	0.56022372	0.051036945	0.56022372
Full_2	0.05638188	0.110469757	0.510382489	0.612520537	-0.166716371	0.279480031	-0.166716371	0.279480031
Exp_1	0.009282065	0.135100568	0.068704857	0.945958542	-0.263559066	0.282123196	-0.263559066	0.282123196
Exp_2	0.644516318	0.151369614	4.257897625	0.000117261	0.338819182	0.950213455	0.338819182	0.950213455
Sat_1	0.123857492	0.137651936	0.899787506	0.373488004	-0.154136232	0.401851217	-0.154136232	0.401851217
Sat_2	-0.062060584	0.119709281	-0.518427506	0.606946805	-0.303818382	0.179697214	-0.303818382	0.179697214
Need_1	0.421809123	0.108435782	3.889944041	0.000360364	0.202818619	0.640799627	0.202818619	0.640799627
Need_2	0.030578216	0.080553192	0.379602786	0.706199463	-0.132102256	0.193258689	-0.132102256	0.193258689

Regression Analysis Reduced

SUMMARY OUTPUT								
<i>Regression Statistics</i>								
Multiple R	0.800600957							
R Square	0.640961893							
Adjusted R Square	0.617546364							
Standard Error	0.619185156							
Observations	50							
<i>ANOVA</i>								
	<i>df</i>	<i>SS</i>	<i>MS</i>	<i>F</i>	<i>Significance F</i>			
Regression	3	31.48404816	10.49468272	27.37336832	2.61175E-10			
Residual	46	17.63595184	0.383390257					
Total	49	49.12						
	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Lower 95%</i>	<i>Upper 95%</i>	<i>Lower 95.0%</i>	<i>Upper 95.0%</i>
Intercept	-2.143324671	0.674274994	-3.178710008	0.002645569	-3.500569839	-0.786079504	-3.500569839	-0.786079504
Full_1	0.352002485	0.089114932	3.949983184	0.000266394	0.172623429	0.53138154	0.172623429	0.53138154
Exp_2	0.642767349	0.121805785	5.276985389	3.4509E-06	0.39758502	0.887949679	0.39758502	0.887949679
Need_1	0.406837738	0.084175251	4.833222769	1.53495E-05	0.237401747	0.57627373	0.237401747	0.57627373

Correlation

	Full_1	Full_2	Exp_1	Exp_2	Sat_1	Sat_2	Need_1	Need_2	Import
Full_1	1								
Full_2	0.500477	1							
Exp_1	0.541368	0.554336	1						
Exp_2	0.146659	0.127729	0.426034	1					
Sat_1	0.30953	0.207294	0.26277	-0.08532	1				
Sat_2	0.454388	0.182176	0.200699	0.133162	0.32449	1			
Need_1	0.133861	0.123803	-0.15628	0.039831	-0.18901	0.220927	1		
Need_2	0.085559	0.207246	0.059038	0.222726	0.166115	0.083699	0.386632	1	
Import	0.482606	0.355968	0.359863	0.540746	0.075085	0.293859	0.497371	0.371131	1

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	MGMT 280 - Introduction to Management Information Systems – Term paper
This documentation is relevant to Question number:	Intellectual Inquiry Question #16
Briefly summarize the content of the file and its value as evidence supporting program review:	Sample student term paper on cloud computing, demonstrating mastery of modes and creative work.

Cloud Computing: Changing Business Operations and Accounting Practices



Lake Superior State University

Abstract

This paper explores the newest technology of cloud computing and its effects on the accounting industry. It begins with identifying what cloud computing is. Then the advantages and disadvantages of cloud computing are weighed to emphasize why making a switch to cloud computing is a big deal to business. Also, to show how cloud computing can be very helpful or harmful to a company. Then the impact cloud computing has had on accountants and accounting firms is discussed so show the impacts that cloud computing has on them.

Cloud Computing: Changing Business Operations and Accounting Practices

Due to increases in bandwidth, cloud computing has become an emergent technology. It is catching the eye businesses that are tired of high information technology (IT) costs. With cloud computing, businesses can ditch their on premise servers and hardware and move onto Internet software and storage. The cloud has become a powerful and valuable tool for many businesses. There are many advantages to using cloud computing that businesses could use to their benefit, as long as the risks that cloud computing carry along with them do not over power the advantages. Whether to switch to cloud computing or stay with their current on-premise system is a big decision that businesses are facing today. However, not only businesses need to be aware of the new cloud technology, accountants do too. Cloud computing can be a very beneficial tool to accountants. It can ease their work load by keeping their client's information better organized as well as extremely up to date. Cloud computing is changing the way businesses and accountants work together, increasing the value of a business as well as the services that accountants offer.

It is important to begin with defining cloud computing, however doing such a thing has proven to be a difficult task. In 2015, Kushida, Murray, and Zysman, defined cloud computing “as follows: Cloud computing delivers computing services – data storage, computation and networking – to users at the time, to the location, and in the quantity they wish to consume, with the costs based only on the resources used” (p. 7). In the words of Arutyunov (2012), “cloud (diffused) computing (or cloud (diffused) data processing is a technology of data processing where computer resources and capacity are provided to the user as an Internet services” (p. 173). Alali and Yeh (2012) noted that “the National Institute of Standards and Technology (NIST) defines cloud computing as 'a model for enabling convenient, on-demand network access to a

shared pool of configurable computing resources ... that can be rapidly provisioned and released with minimal management effort or service provider interaction” (p. 14). Each “definition provides the essential characteristics of cloud computing: on-demand self-service, broad-network access, resource pooling, rapid elasticity, and measured service” (Alali & Yeh, 2012, p. 14). So although each of those definitions are different they are all still correct.

Yet another difficult task is determining when cloud computing actually began and who first coined the term cloud computing. According to Regalado (2011), “some accounts trace the birth of the term to 2006, when large companies ... began using 'cloud computing' to describe the new paradigm in which people are increasingly accessing software, computer power, and files over the Web instead of on their desktops” (para. 2). Regalado (2011) further explained though that the first use of the term can be traced back to a later date, 1996 (para. 3). However, the concept of cloud computing was developed in the late 1960s. During that time period computer scientists J.C.R. Licklider introduced the “idea of 'intergalactic computer network'” and John McCarthy who introduced the “idea of computation being delivered as a public utility” (Mohamed, 2009, para. 2-4). No matter who created it or when it was created, cloud computing has come a long way since it first began. In fact, cloud computing is still expanding today thanks to advances in wireless technology.

It is important to remember that not all businesses are the same. Every business has different needs. Also, each business is a different size and is at a different stage in the business life cycle. So when choosing on whether to move to the cloud or to continue to use in house storage systems there are a few factors business owners need to consider.

For most businesses, the most important factor is cost. Businesses need to evaluate the cost difference between staying with their current service versus moving to the cloud. Typically

the cost of the cloud is determined by how much storage is used by the business and how many transactions that business has. For example, "Amazon's Elastic Block Store only charges \$0.10 per gigabyte of storage and \$0.10 per million IO transactions" (Aljabre, 2012, p. 238). By moving to the cloud, a business will save money from not "buying various powerful servers for storage" (Aljabre, 2012, p. 237) and by being able to reduce the "amount of hardware they must invest in" (Aljabre, 2012, p.237). They can also eliminate the many employees that were "once needed to manage hardware" (Aljabre, 2012, p. 237). There would also be less costs for the buildings that the servers for the hardware were housed in. And if the business is able to eliminate those extra buildings altogether there would be less electricity used (both by the lighting in the buildings and the servers themselves). Businesses can talk with their accountant(s) to analyze the costs associated with each route and then make the decision that would be most beneficial for the business.

The next factor businesses owners should take into consideration is the stage of the business life cycle that the business is currently in. The business life cycle is defined as "the movement of an enterprise as it evolves through typical stages of corporate existence" (Business Dictionary, 2017, para. 1). The stages are in order as follows: seed, start-up, growth, established, expansion, mature, and exit (Janssen, n.d.). Cloud computing services are thought to be "more ideal for smaller businesses or ... businesses just starting" (Aljabre, 2012, p. 237). That is because the "initial start up cost for large businesses may be expensive as switching between any services can not only incur costs, but most importantly can be time consuming; and in business, time is money" (Aljabre, 2012, p. 238). Another reason it would be easiest for a start-up business to use cloud computing is because if all the processes are already set up on the cloud they won't have to be switched over and switching can be risky. If a large business has already reached the

mature stage, and is operating efficiently, effectively and profitably, switching to the cloud might not be in its best interest. "Large businesses fear that data centers may not be able to keep up with their extensive needs" (Aljabre, 2012, p. 238). As previously stated, making the switch can be risky and if it goes wrong it could cause the whole business to fail because "data center downtime would result in profit loss" (Aljabre, 2012, p. 238).

"Cloud computing is a new technology, however like all technology it comes with both benefits and drawbacks" (Aljabre, 2012, p. 235). Businesses need to take into consideration all of these advantages and disadvantages of cloud computing. Owners need to weight the risks against the benefits to decide if making the switch would be an appropriate decision for their company.

Saving money or reducing costs are very important to businesses. With using cloud computing there can be lots of cost savings. Like explained earlier on, businesses would not have to buy servers for hardware nor would they have to use extra electricity for these servers and the buildings they are housed in. "It is not unusual for many companies to have very high IT infrastructure costs and it is with the use of cloud computing that it actually lowers the costs of these infrastructures" (Aljabre, 2012, p. 236). Less IT personnel would be needed to manage the IT systems, mainly because they will only need to help with computers and software, rather than with servers and hardware malfunctions.

Another way to save money is that the company would not have to buy high powered computers for the employees because applications would not have to be run on the computers, they would be run on the cloud instead (Aljabre, 2012, p. 235). Also, almost everything is stored on the cloud so the computers would not need as much storage capacity. This would allow companies to buy computers that have less processing power and less storage capacity, which

means they are cheaper. Along with that would be not having to buy the applications for every single computer, instead the applications can be access through the cloud by everybody (Aljabre, 2012, p. 235).

The most widely known advantages of switching to cloud computing are accessibility/flexibility and scalability. In 2015, Corkern, Kimmel, and Morehead concluded that “businesses demand access to data 24 hours a day, seven days a week ... and this capability of anywhere, anytime access allows for an organization's work to become more flexible, distributive, and collaborative” (p.15). With cloud computing, employees could access information anywhere that they can gain internet access with their laptop, or perhaps their smart phone. This also means that employees can better not only when they are at the company, but also when they are away (like on business trips).

Group work between employees can be done with more ease. They each would have access to the same information at any time they need to work. Each member can also be sure that they have the updated version of each document. For example, on Google Docs, whenever a group member makes an edit it is shown to the other members and it is saved automatically as they edit it. Everyone would have the same programs so all document formats would be the same and compatible on each employee's computer (Arutyunov, 2012, p. 176). Also, companies with multiple locations have a higher “opportunity to collaborate and distribute their work among the many company locations” (Corkern et al., 2015, p. 15). This means that the workload of each location can be shared amongst each other and also allows many employees to have flexible work schedule (Corkern et al., 2015, p. 15).

Scalability is the ability to change in size or scale. All business have the ability to change. Not only do business have scalability but so to cloud computing systems. “Scalability stems

from the idea that any quantity of computing resources can be purchased at any time, and companies pay for the services they use based on consumption” (Corkern et al., 2015, p. 15). For example, during peak performance periods cloud systems can expand to collect the data the business need and vice versa when in slow periods (Corkern et al., 2015, p. 15). “Simply put, scalability gives the organization the ability to scale its computing resources up or down as business conditions dictate” (Corkern et al., 2015, p. 15). There are a plethora of advantages that cloud computing can have, a few are explained above, however other advantages can come based on the type and need of the business.

Cloud computing is provided to a business through the use of the Internet. So of course needing a “permanent internet connection” (Arutyunov, 2012, p. 176) is a limitation, more specifically a constant, strong internet connection. Also a limitation involving the internet comes when the access is slow (Arutyunov, 2012, p. 176). Slow internet makes for slow working conditions and sometimes can make work even impossible if employees are unable to access the programs and information they need. With that said, even though the cloud would give more access to programs that are not necessary to download to a computer, those programs may not offer as many features. An example of this would be comparing Google Docs (a cloud program) and Microsoft Excel (a non-cloud program). “Google Docs spreadsheet has far fewer features and functions than Microsoft Excel” (Arutyunov, 2012, p. 176).

Another disadvantage to using cloud computing is that programs on the cloud might run slower than programs on local computers (Arutyunov, 2012, p. 176). In a large organization there could be hundreds to thousands of people gaining access to the data and programs stored on the cloud. With that many employees using the internet, the speed limit of the access could be very small (Arutyunov, 2012, p. 176). Also, there would be lots of congestion along the path

between the user and the cloud (Arutyunov, 2012, p. 176). So the slower program speeds is due to not only lots of information being transferred, but also to the congestion on the servers and on the internet bandwidth (Arutyunov, 2012, p.176).

The largest concerns with switching to cloud computing involve reliability and security. Reliability would mean that the cloud system would have to perform consistently well. "If the cloud was to go down and the user does not have a backup of her/his document, he/she will simply lose the document" (Aljabre, 2012, p. 236). The same goes with any data or information stored on the cloud. As long as the information is saved on the cloud it will, in most instances, still be there when the cloud service is back up and running. However if the information is not saved or the entire cloud system loses all memory, the information will be gone forever (considering no backup was made). "The recent cloud outage at Amazon and Microsoft shows the significance of backup and emergency plans" (Alali & Yeh, 2012, p. 17).

"Organizations can be reluctant to migrate to the cloud because they perceive such a move as diminishing the organization's control over its own data" (Corkern et al., 2015, p. 15). Putting information and data onto the cloud moves the security of the information and data to a third party (the service that provides the business its cloud system). Putting "data in the cloud has expanded the number of potential targets for cyber-attacks" (Corkern et al., 2015, p. 16). However, it is not only possible "for the cloud systems to be hacked and accessed by unauthorized people" (Aljabre, 2012, p. 236), but it is also possible for employees of the business to unknowingly allow unauthorized users access. As previously noted, cloud services can allow employees to work anywhere that they can access the internet with their laptops. So if an employee was out in public, say at an internet cafe, many things could happen that could allow unauthorized users to gain the businesses data from that employee. One instance might be

that the employee doesn't have any security software on their computer, a hacker might be able to easily hack the employee's computer and gain the information to login to the business's cloud system. Another instance involving logins would be if the employee had wrote down their passwords on a paper or in a book and forgot it at the cafe. Who ever found the book or paper could use it to login to the system and do harmful things, but yet it would look as if the employee was doing it. Also, the employee could just simply forget their laptop at the cafe and someone could come steal it (and the login information on it) and gain access to the cloud that way.

To solve this uneasiness with the security of cloud computing, the National Institute of Standards and Technology (NIST) "created a cloud computing security working group to assist corporations in developing data security policies and governance systems" (Alali & Yeh, 2012, p. 17). They have created "a list of security and authentication protocols, such as XML Encryption Syntax and Processing, Transport Security Layer (TLS), Key Management Interoperability Protocol (KMIP), and Security Content Automation Protocol (SCAP)" (Alali & Yeh, 2012, p. 17). It is claimed that "data can be even more secure on the cloud than it is on the premises because of the additional security measures some cloud service providers have taken" (Corkern et al., 2015, p. 16). Experts in security also advise to split and isolate the information of different users (Shkurti, 2014, p. 2). There could also be security issues with what employees have access to certain information. But "service level agreements (SLAs) can be used to define roles and responsibilities of cloud providers and users to assure availability and retrievability" (Alali & Yeh, 2012, p. 17).

Now that a good background of cloud computing has been established, the impact it has on the accounting profession can be explained. Businesses are "gearing towards bookkeeping

services which are less costly” in order to save money (Blake, 2012, para. 1). So for accounting firms to be able to keep their price of services low, and be able to compete with low cost bookkeeping services, they can use cloud computing. Using Software as a Service (SaaS) allows accounting firms to have access to cloud computing service software without having to invest into server infrastructure or internal IT personnel (Blake, 2012, para. 7). With many SaaS programs such as Intuit QuickBooks or Xero, monthly subscriptions are very low to encourage accountants to switch to the cloud business model.

“Accounting is ... influenced by the development of information technology. The IT impact in accounting is mainly seen in the dominant use of computerized accounting packages” (Shkurti & Muca, 2014, p. 1). With business becoming a 24 hour, 7 days a week world, owners, managers, and investors all need current accounting information in a timely and accurate matter, available at any time they wish (Shkurti & Muca, 2014, p. 1). To be able to meet such a demand, accounting programs that can respond to financial needs are more emergent (Shkurti & Muca, 2014, p. 2). Cloud computing is the answer to these demands.

“The benefits [that cloud computing] has introduced to the accounting discipline are mainly observed as improvements in the decision-making process, increased data security, and enhanced quality of financial reporting” (Shkurti & Muca, 2014, p. 3). Accounting systems that are based on cloud technology “provide immediate financial reports and increased financial reporting liability” (Shkurti & Muca, 2014, p. 3) as well as “ease the process of conducting transactions and obtaining timely feedback for decision making in achieving operational goals” (Shkurti & Muca, 2014, p. 3). Also an important aspect of cloud computing in the accounting domain is document scanning (Blake, 2012, para. 4). Invoices and receipts can be scanned and posted automatically to the accounting system as soon as they are received (Blake, 2012, para.

4). An accountant would check and confirm that entry afterward to make sure it is correct (Blake, 2012, para. 4). By using document scanning, accountants can have timely information on their client's businesses and offer new services such as business analysis or cash flow forecasting (Blake, 2012, para. 5).

With cloud computing, accountants have become “less about book-keeping and more about financial advice and consultation” (Business I.T. Solutions, n.d., para. 5). That type of accounting is known as real management accounting (Business I.T. Solutions, n.d., para. 5). In addition to all the benefits cloud computing offers, “when dealing with a client who has cloud based solutions in place, the accountant doesn't have to leave his/her own office when looking for up to the minute data from a client site” (Business I.T. Solutions, n.d., para. 9). Also, cloud computing removes the issue of data redundancy (data being repeated from being put in by multiple departments).

Cloud computing is changing the way businesses operate. It can provide up to the minute information on a business's financial sittings. Cloud computing can save businesses hundreds of thousands of dollars by lowering IT costs. It also allows better communication amongst business segments and employees. The security and reliability of cloud computing is still unsure. However, computer security groups are working on ways to improve security on the cloud. Accountants can take great advantage of this new technology so improve their decision making abilities by having access to timely information on a business's performance. Cloud computing allows accounting firms to compete with low cost bookkeeping services by lowering their costs. Cloud computing has not only changed the way people do business, but also the way accountants do their jobs.

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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	MGMT 280 - Introduction to Management Information Systems – Course Preparedness Assignment (CPA) (Fall 2018)
This documentation is relevant to Question number:	Intellectual Inquiry Question #16
Briefly summarize the content of the file and its value as evidence supporting program review:	Sample Student CPA assignment - Intended to help students be better prepared for classroom discussions, demonstrating evidence of course-level learning outcomes are at an appropriate level.

CHAPTER 14



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Acquiring Information Systems and Applications

CHAPTER OUTLINE

- 14.1 Planning for and Justifying IT Applications
- 14.2 Strategies for Acquiring IT Applications
- 14.3 Traditional Systems Development Life Cycle
- 14.4 Alternative Methods and Tools for Systems Development

LEARNING OBJECTIVES

- 14.1 Discuss the different cost-benefit analyses that companies must take into account when formulating an IT strategic plan.
- 14.2 Discuss the four business decisions that companies must make when they acquire new applications.
- 14.3 Enumerate the primary tasks and the importance of each of the six processes involved in the systems development life cycle.
- 14.4 Describe alternative development methods and the tools that augment these methods.

Opening Case

MIS Peoples State Bank Transforms Its Information Technology

The Business Problem

With 15 full-service retail and commercial locations, Peoples State Bank (PSB; www.psbwi.com) has provided central and northern Wisconsin

residents and locally owned businesses with traditional retail and commercial banking products since 1914. Businesses this old often have information systems that have become outdated and no longer meet their needs. These systems, referred to as *legacy systems*, often hinder modern business operations. This was the case with PSB.

PSB's strategic goals are to provide its customers with a superb experience and its employees with the best possible tools and resources. Unfortunately the bank's legacy systems were impeding its ability to accomplish those goals.

Legacy systems in banking provided the core processing necessary to handle simple account transactions such as deposits, withdrawals, and payments. These systems were expensive to build, because they required on-premise hardware, software, and networking technologies. (We discuss on-premise computing in Plug IT In 4.) In general, legacy systems at banks were developed to support hard copy, paper-based transactions. These legacy systems became ineffective over the years because they did not support different ways for customers to interact with the bank (e.g., online from computers, tablets, and smartphones).

Banks were very slow to respond to online business models because their business processes were built on legacy systems that were not designed to engage customers online. Specifically, PSB employed an excessive number of legacy systems, which did not effectively work together. In addition, the bank's information technology platform did not provide the capabilities required for a PSB customer to access account information via a Web browser or mobile app.

To offer superb customer experiences and modern banking tools, PSB needed a new IT infrastructure that was designed to handle Web and mobile banking and near-real-time customer updates. The challenge was that the bank's in-house IT expertise was able to maintain the legacy systems, but it lacked the capability to design or build new systems. For PSB to move forward with their strategic goals, it had to acquire an IT infrastructure that would include the necessary tools to operate in the modern banking environment.

The Solution

Leif Christianson, PSB's Chief Operating Officer, spearheaded a complete technology overhaul that moved the bank away from their legacy systems. Today, when businesses decide to update their systems, they can consider several options. One option was on-premise computing, in which PSB would develop, own, and operate all parts of its IT function. Alternatively, the bank could outsource the entire system. Both models offered advantages. Ultimately, PSB determined that IT was not one of its core competencies (providing outstanding customer service in banking was). The bank therefore decided that outsourcing would allow enable it to scale its operations for growth more quickly than if it owned and operated the IT infrastructure. To implement this plan, PSB entered into a service agreement with Jack Henry & Associates (JHA; www.jackhenry.com) to gain access to the tools and technology it needed without having to develop the expertise within their organization.

JHA, founded in 1976, is a leading provider of computer systems and ATM/debit card/ACH transaction processing services for financial services organizations. (ACH payments are electronic payments that are created when the customer gives an originating institution the

authorization to debit directly from the customer's checking or savings account for the purpose of bill payment.) JHA's technology solutions serve more than 11,000 customers nationwide. PSB transferred all of their banking information system operations to JHA.

The Results

The conversion from PSB's legacy system to the JHA solution was a success. This transition brought new core capabilities to the bank. With JHA, PSB is able to offer online banking, mobile banking, customer payment solutions, and other services that were not available with the legacy systems. As a result, PSB's assets grew from before the 2010 conversion to more than \$784 million in 2015. By outsourcing the capital expense and maintenance of on-premise information technology, PSB was able to focus on other priorities such as cross-training employees to help customers in areas where they previously were not able to provide service.

Managing change of this size is often difficult for organizations because employees are frequently resistant. However, PSB convinced its employees of the benefits of the new system. As a result the bank received quick employee buy-in and cooperation. Employees appreciated the fact that they could now deliver services in the ways their customers wanted.

Today, PSB customers are able to check account information, pay bills and transfer funds, view a detailed transaction history, download statements, deposit checks, and perform other activities through their mobile banking experience. These tools have enabled PSB to compete with much larger banks.

Sources: Compiled from D. Verman, "Banks Face Major Pressure to Transform Legacy Payment Systems," *PaymentSource.com*, July 27, 2015; K. Flinders, "The Obstacles to Software-as-a-Service Adoption in Banking," *ComputerWeekly.com*, July 15, 2015; P. Schaus, "Legacy Systems Prevent Banks From Delivering on Digital Promises," *BankInnovation.net*, June 1, 2015; K. Burger, "Outsourcing Helps Peoples State Bank Execute Growth Strategy," *Information Week*, December 3, 2014; J. Lankenau, "The Benefits of SaaS," *banktech.com*, October 9, 2014; K. Flinders, "Big Banks' Legacy IT Systems Could Kill Them," *ComputerWeekly.com*, January, 2014; peoplesfinancial.com, jackhenry.com, accessed October 29, 2015.

Questions

1. Discuss the problems with PSB's legacy systems that led to the information technology conversion.
2. Why did PSB decide to outsource their IT rather than developing new systems in-house as they had in the past?
3. What are the potential disadvantages that PSB might encounter from outsourcing its IT function?

Introduction

Competitive organizations move as quickly as they can to acquire new information technologies or modify existing ones when they need to improve efficiencies and gain strategic advantage. As you learned from the chapter opening case, problems and pitfalls can arise from the acquisition process.

Today, acquisition goes beyond building new systems in-house, and IT resources involve far more than software and hardware. As you saw in the chapter opening case, the old model in which firms built their own systems is being replaced with a broader perspective of IT resource

CPA Chapter 14
November 8th, 2018

1. The problems with PSB's legacy system was first that these systems were built to handle simple account transactions like deposits, withdrawals, and payments. The major problem with these systems is that the world has really changed right then, and the legacy system does not support more complex transactions, such as online banking from computers, tablets, or smartphones. The bank wanted to update these systems in order to provide great customer service, but the in house IT department was only able to maintain the system, not upgrade it.
2. Companies have two options when it comes to this, they can either own and operate their own system in house, or decide to outsource the system to a third party. The reason that PSB decided to outsource was because they realized that technology and IT is not one of their strong suits, or what they want to focus on. Their focus is providing great customer service in terms of banking. They felt that if they outsourced the operation they would be able to scale the operation for growth more quickly than if they owned and operated the system themselves.
3. Potential disadvantages from outsourcing its IT function include the reliance on a third party. You are essentially handing over a huge important part of your business to someone else. A result of this could be that the third party does not meet the same standard that you would yourself, the third party could be hacked and someone could steal all your information. You also must rely on that third party because they do have all your information through your systems, this is sensitive stuff to have to hand over.

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	MGMT 380 – Leadership – Sample poster from Annual Senior Research Symposium
This documentation is relevant to Question number:	Intellectual Inquiry Question #16
Briefly summarize the content of the file and its value as evidence supporting program review:	Sample poster presented at the LSSU Annual Senior Research Symposium demonstrating collecting, analyzing and communicating information.

Student Leadership Development in Collegiate Sports

Lake Superior State University
Jody Rebek, Faculty Advisor



Research Question

How does participation in collegiate sports help in the development of student leadership abilities?

Methodology

This is a literature review that included four scholarly articles. Two of the articles proposed different theories regarding leadership development in students. Another article is a qualitative study based on interviews of executive members in recreational sports and the last study was a quantitative analysis that used the Student Leadership Practices Inventory (LPI) to study leadership development in NCAA Division 3 sports teams.

Description

Throughout college, students develop as people and leaders. It is becoming increasingly important for these students to become leaders that are ethical and trustworthy (Kiersch and Peters, 2017). Students can develop their leadership through sports; however, a more holistic approach may need to be taken that includes leadership education, performance psychology, and personal development (DiPaolo, 2017). According to Grandzol, Perils, and Draina (2010) team captains developed the most leadership skills throughout the course of a season, compared to team members. Students that held executive positions in recreational sports learned skills in organizing, planning, and delegating; balancing academic, personal, and professional roles; motivating/influencing others and being a mentor/role model; problem solving and decision making; communication skills; working with others/diversity; and giving and receiving feedback (Hall, Forrester and Borsz, 2008).

Common Themes Within Articles

- Developing interpersonal relationships is an important ability for effective leadership.
- Effective communication is a skill that is developed when students are in leadership positions provided by collegiate sports.
- Leadership skills can continue to help students once they have graduated and entered the workforce.

Figure 1.

Table 2. Authentic and Servant Leadership Development Program Components

Leadership Competency Area	LD Program Components (LPI, 7 Focus*)	Target Competencies	Sources
"Forward" Focus	Guided self-reflection (RO)	Self-awareness Internalized moral perspective	Branson (2007) George (2003)
	Ethics training (RO)	Internalized moral perspective	
	Developing self-assessives, "This I Believe" exercise (RO)	Self-awareness Internalized moral perspective	Erleson (2009)
"Ongoing" Focus	Sharing and learning self-assessives, "This I Believe" exercise (CE & RO)	Relational transparency/vulnerability Interpersonal acceptance	Fineman (2009)
	Continuity service (AE)	Interpersonal acceptance Stewardship	Follett (2007)
	Service-learning team projects (integrating community service with project management skill development) (CE, AE)	Empowerment Accountability Interpersonal acceptance Stewardship	Snell et al. (2015)
	Class lectures (including guest lectures from local leaders and leadership scholars, etc.) (AC)	Balanced Processing	
	360 Feedback (from peers, professors, coworkers, supervisors, etc.) (RO)	Humility Courage	Reich & Caza (2012)

*Concrete Experience (CE), Reflective Observation (RO), Abstract Conceptualization (AC), Active Experimentation (AE)

(Kiersch et al., 2017 pg. 162)

Figure 2.

An Integrated Model of Player Development



(DiPaolo, 2017, pg. 220)

Figure 3.



(Kouzes and Posner, 2013, p. 3)

Discussion and Conclusion

The two theories displayed in Figure 1 and Figure 2 had three common components: self-awareness, accountability, and being a team player. Figure 3 shows the model that was used by Grandzol, Perils, and Draina (2010) in their study of team captains. These categories are similar to the findings of Hall, Forrester and Borsz (2008) were they found that after self reflection students that held executive positions in recreational sports learned skills in organizing, planning, and delegating; balancing academic, personal, and professional roles; motivating/influencing others and being a mentor/role model; problem solving and decision making; communication skills; working with others/diversity; and giving and receiving feedback

Applications for LSSU

This research can be applied to the campus of Lake Superior State University by expanding the leadership opportunities students have to hold leadership positions on sports teams, intramurals, and in clubs. Students may also benefit from a leadership course related to their major. Other ways to encourage student leadership is to support current student leaders in their endeavors by being involved in President's Council. Finally, promoting participation in Student Government would be an effective way for students to learn leadership skills.

References

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Hall, S. L., Forrester, S., & Borsz, M. (2008). A constructivist case study examining the leadership development of undergraduate students in campus recreational sports. *Journal of College Student Development*, 49(2), 125-140. Retrieved from <https://proxy.lssu.edu/login?url=https://search.proquest.com/docview/195179276?accountid=27857>

Kiersch, C., Dr., & Peters, J., Dr. (2017). Leadership from the inside out: Student leadership development within authentic leadership and servant leadership frameworks. *Journal of Leadership Education*. <https://doi.org/10.12806/JLE/11/12>

Kouzes, J. M., & Posner, B. Z. (2013). *The leadership challenge*. San Francisco, CA: Jossey-Bass.

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2018

PART 2: Degree-Level Review

Degree Program: ___Bachelor of Science in Business Administration, major in Marketing_____

Explain how the program works to address each of the following questions. For each question, respond with a narrative and supporting evidence.

Assessment (CC 4.B and CC 4.C)

1. Provide evidence that the degree-level program outcomes are clearly stated and are effectively assessed, including the "use of results." Attach the 4-Column Program Assessment Report.

The Business Administration – Marketing Bachelor of Science degree focuses on clear, realistic, and attainable student learning outcomes. Primarily, these seven (7) outcomes focus on development and advancement of marketing/business knowledge, research, synthesis, critical analysis of qualitative and quantitative data, written and oral interpersonal communication, team/group collaboration, and entry-level skills employers value and seek.

Specifically, these program outcomes are:

1. Graduates will demonstrate basic knowledge of marketing and other functional areas of business and their relationship to each other.
2. Graduates will demonstrate the ability to research, synthesize, analyze, and accurately interpret quantitative and qualitative information to drive effective marketing decision making.
3. Graduates will demonstrate the ability to communicate effectively, orally and in writing, their marketing observations, findings, research, and recommendations to a large audience.
4. Graduates will demonstrate entry-level marketable skills appropriate to a marketing related position and team in industry, such as in sales, event planning, marketing communications, public relations, retailing, market analysis, and/or product management.
5. Graduates will demonstrate the ability to use technology to assist with the synthesis and analysis of data, oral and written communications, and group collaboration.
6. Graduates will demonstrate knowledge of business-core subjects.
7. Graduates will demonstrate skills in research, communications, and critical thinking.

The Lukenda School of Business consistently employs the primary assessment tools of the Major Field Test in Business (MFT), Senior Survey results, and Professional Advisory Board (PAB) survey and feedback.

The 4-Column Program Assessment Report is attached for evidence of support.

Assessment: Program Four Column

Program (CoS) - Business Administration-Marketing BS

Assessment Contact: Prof. Valerie Philips

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>Basic Marketing Knowledge - Graduates will demonstrate basic knowledge of marketing and other functional areas of business and their relationship to each other.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Goal Level (Bloom/Webb): Low-Level (Understanding/Remembering) [Bloom]</p> <p>Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem.</p>	<p>Direct - Exam/Quiz - Standardized - ETS Major Field Test in Business completed by graduating students in the capstone course, BUSN466 (Business Policy)</p> <p>Criteria Target: The mean score of marketing majors will be in the 75th percentile or above in the marketing section.</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: Yes</p> <p>Fall 2016 - 82nd percentile</p> <p>Spring 2017 - 79th percentile (08/13/2018)</p> <hr/> <p>Finding Reporting Year: 2017-2018</p> <p>Goal met: No</p> <p>Fall 2017 - 1st percentile</p> <p>Spring 2018 - 18th percentile (08/13/2018)</p>	<p>Use of Result: Because the goal was met during the reporting year, no specific action will be taken based on these results. (08/13/2018)</p> <hr/> <p>Use of Result: One marketing major took the MFT during the fall 2017 semester and four during the spring 2018 semester. (08/13/2018)</p>
<p>Decision Making - Graduates will demonstrate ability to research, synthesize, analyze and accurately interpret quantitative and qualitative information to drive effective marketing decision making.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom]</p>	<p>Direct - Capstone Project - Including undergraduate research - Business plan created in capstone course, BUSN466 (Business Policy)</p> <p>Criteria Target: 75% of marketing majors will receive 80% or higher in the marketing section</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: Yes</p> <p>Fall 2016 - 100%</p> <p>Spring 2017 - 88% (08/13/2018)</p> <hr/> <p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>Fall 2017 - 100%</p> <p>Spring 2018 - 75% (08/13/2018)</p>	<p>Use of Result: Because the goal was met during the reporting year, no action will be taken based on these results. (08/13/2018)</p> <hr/> <p>Use of Result: Because the goal was met during the reporting year, no action will be taken based on these results. (08/13/2018)</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>Institutional Learning: ILO3 - Analysis and Synthesis - Students will organize and synthesize evidence, ideas, or works of imagination to answer an open-ended question, draw a conclusion, achieve a goal, or create a substantial work of art.</p>	<p>Direct - Writing Intensive Assignment - Individual or Team Projects with Presentations: MRKT281 (Marketing Principles and Strategy) Criteria Target: 75% of Marketing majors receive 80% or higher on major project, written component and presentation in MRKT281 and 75% of Marketing majors receive 80% or higher on written case analyses in MRKT281</p>	<p>Finding Reporting Year: 2017-2018 Goal met: Yes 75% of Marketing majors earned 80% or higher in major project in MRKT 281 (08/31/2018)</p>	<p>Use of Result: No further change in MRKT 281 project and presentations since SLO was met.</p> <p>As 67% of Marketing majors received 80% or higher on written case analyses, additional class time will focus on case analysis, and students will have to complete 3 (vs. 2) case analyses. (08/31/2018)</p>
<p>Communication in Marketing - Graduates will demonstrate the ability to communicate effectively, orally and in writing, their marketing observations, findings, research, and recommendations to a large audience. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): High-Level (Creating/Evaluating) [Bloom] Institutional Learning: ILO1 - Formal Communication - Students will develop and clearly express complex ideas in written and oral presentations</p>	<p>High Impact Program Practices 1: Writing-Intensive Course(s)</p>	<p>Finding Reporting Year: 2016-2017 Goal met: No 90% of Marketing majors received at least 80% on MRKT 281 project and presentation; 67% of Marketing majors receive 80% or higher on written case analyses in MRKT 281. (08/31/2018)</p>	<p>Use of Result: MRKT 281 class will utilize more cases in instruction. (08/31/2018)</p>
<p>Employability Skills - Graduates will demonstrate entry-level, marketable skills appropriate to a marketing-related position and team in industry, such as in sales, event planning, marketing communications, public relations, retailing, market analysis, or product management. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom]</p>	<p>Indirect - Survey, including faculty, supervisors, employers - 1. Supervisor evaluations of internships; 2. Professional Advisory Board (PAB) Survey Criteria Target: 1. 80% of marketing majors receive "good" or better on supervisor evaluations; 2. 100% of PAB members indicate</p>	<p>Finding Reporting Year: 2017-2018 Goal met: Yes 100% of marketing majors received "good" or better on supervisor evaluations of internships (08/31/2018)</p> <p>Finding Reporting Year: 2016-2017 Goal met: No 95% of Marketing students earned "good" or higher on</p>	<p>Use of Result: Continued monitoring of internships to ensure 100% score. Consideration of student-led and organized career fair, in 2019 spring semester, specializing in business positions and internships, to ensure qualification, monitoring and oversight of student/graduate experiences. (08/31/2018)</p> <p>Use of Result: Increase number of meetings with student while performing internship; make</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
	that they agree or strongly agree that LSB graduates achieve the School's outcomes	supervisor evaluations (08/31/2018)	contact with employer at midpoint to ensure student performance is acceptable. (08/31/2018)
		Finding Reporting Year: 2016-2017 Goal met: No 88% of PAB members believe that graduates have attained appropriate research skills (08/31/2018)	Use of Result: Add SPSS project to MRKT 480 Marketing Research; Investigate new Special Topics courses in mobile marketing metrics (08/31/2018)
		Finding Reporting Year: 2017-2018 Goal met: No 89% of PAB members believe students are involved in profession (08/31/2018)	Use of Result: Introduce BUSN 101 compulsory course to stress this involvement and encourage ways to become more involved (Fall 2018) (08/31/2018)
Use of Marketing Technology - Graduates will demonstrate the ability to use technology to assist with the synthesis and analysis of data, oral and written communications, and group collaboration.	Direct - Group project, collaborative learning - Group Research Project completed in MRKT480 (Marketing Research) that includes data collection, data analysis, a written report and an oral presentation	Finding Reporting Year: 2016-2017 Goal met: Yes 100% of students earned 80% or higher on the project (09/05/2018)	Use of Result: The class project consisted of conducting research on why students attend LSSU. The findings were shared with the faculty and staff of the Lukenda School of Business. (09/05/2018)
Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) (Bloom) Institutional Learning: ILO1 - Formal Communication - Students will develop and clearly express complex ideas in written and oral presentations.	Criteria Target: 75% of marketing majors receive 80% or higher on the group project High Impact Program Practices 1: Collaborative Assignments, Projects High Impact Program Practices 2: Undergraduate Research	Finding Reporting Year: 2017-2018 Goal met: Yes 100% of students earned 80% or higher on the group project (09/05/2018)	Use of Result: Because the goal was met, no changes will be made currently based on these results. The marketing faculty feel the group research project is an appropriate way to measure the learning outcome and will continue to implement the project going forward. (09/05/2018)
2.1 Program Enrollment - Strategy 2.1 The Program establishes realistic goals for program enrollment that are optimistic, realistic, achievable. Goal Status: Active Goal Category: Enrollment	Other Findings Regular, recurring - Press releases showcasing Marketing student work	Finding Reporting Year: 2017-2018 Goal met: Yes Marketing Club worked with President Mitchell to develop new tagline for University. (10/26/2017) Finding Reporting Year: 2018-2019 Goal met: Yes	Use of Result: President announced tagline in university-wide forum. (01/24/2018) Use of Result: MRKT 379 Event produced article in the Soo

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>Business Knowledge - Graduates will demonstrate knowledge of business-core subjects. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Level 2 (Skills and Concepts) (Webb) Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to</p>	<p>and achievement: Minimum of 4 per academic year Marketing and event planning in BUSN 101 Freshman Seminar to stimulate interest in Marketing: Minimum of 1 per academic year Marketing mentorship program in BUSN 101 Freshman Seminar Sports and Events Marketing MRKT 379: One community event per academic year Internships in Marketing field Student involvement with community groups, such as EDC, Michigan Works, DDA, local business owners Development of Marketing Club Marketing student development of Career Day Criteria Target: Program Enrollment Growth Goal: _____+10%_____ by _____2019/2020____ High Impact Program Practices 1: Service Learning, Community-based learning High Impact Program Practices 2: First-year Seminar and Experiences</p>	<p>Sports and Events Marketing MRKT 379 Event (Nov. 2018) Internship with Michigan Works and EDC (1 internship Jan. 2019) BUSN 101 Freshman Seminar Class publicity (Oct. 2018) Marketing Club projects with Chippewa Communities that Care (ongoing) (11/11/2018) Related Documents: Triple C Event</p>	<p>Evening News and radio interviews on Eagle Radio. Students worked with three local businesses. Time Capsule Event by freshmen students garnered publicity, and exposure to Professional Advisory Board and alumni. (11/11/2018)</p>
	<p>Direct - Exam/Quiz - Standardized - ETS Major Field Test in Business administered to graduating seniors in BUSN466 (Business Policy) Criteria Target: The Lukenda School of Business mean percent correct will equal or exceed the national mean in each assessment indicator area.</p>	<p>Finding Reporting Year: 2016-2017 Goal met: No Fall 2016: The LSB met its goal in each assessment indicator area. Spring 2017: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas. (08/30/2018)</p>	<p>Use of Result: Significant improvement has been made in the Quantitative Analysis and Information Systems sections since a management professor with a strong quantitative background was hired and courses in information systems and analytics were added to the common professional component of all business bachelor degrees. Goals in these sections were met</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>answer a complex question or solve a complex problem.</p>		<p>Finding Reporting Year: 2017-2018 Goal met: No Fall 2017: The LSB met its goal in each assessment indicator area. Spring 2018: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas. (08/30/2018)</p>	<p>during the 2016 and 2017 fall semesters. The LSB mean was only slightly below the national mean during the 2017 spring semester. (08/30/2018)</p> <p>Use of Result: The LSB faculty member who teaches MGMT280 (Intro to Management Information Systems) and MGMT371 (Operations & Business Analytics) continues to make adjustments to teaching methods and assignments to deepen students' understanding of difficult concepts covered in these courses. Beginning fall 2018, the professor will implement quizzes to encourage students to read the textbook, assign graded homework, require an online subscription to study material and add more sophisticated Excel exercises. Also, she will begin the semester by giving a presentation on how to succeed in quantitative courses. (08/30/2018)</p>
<p>Professional Skills - Graduates will demonstrate skills in research, communications and critical thinking. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom] Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when</p>	<p>Direct - Capstone Project - including undergraduate research - Business plan project completed in capstone course (BUSN466-Business Policy) Criteria Target: At least 80% of students will earn 80% or higher</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2016 - 80% of students earned 80% of higher Spring 2017 - 100% of students earned 80% of higher (08/30/2018)</p>	<p>Use of Result: LSB faculty and staff are pleased with the improvement shown, as the LSB fell short of its goal during both the fall 2015 (71%) and spring 2016 (78%) semesters. The instructor of BUSN466 equates the improvement in student performance to the following actions: The instructor spent more time with individual students early in the process to</p>

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
answering a question, solving a problem, or achieving a goal.		<p>Finding Reporting Year: 2017-2018 Goal met: Yes Fall 2017 - 100% of students scored 80% of higher Spring 2018 - 95% of students scored 80% of higher (08/30/2018)</p>	<p>provide guidance and mentorship. The instructor provided the grading rubric with the syllabus which provided an outline of each section. The grading rubric also provided LSB faculty with data on which sections students need improvement in that can be tied back to course content. (08/30/2018)</p> <p>Use of Result: LSB faculty and staff will review business plan results together at a School meeting each semester during which the instructor can provide feedback on student performance and curriculum adjustments can be discussed. (08/30/2018)</p>

2. Explain how results from degree assessments were used to improve the degree program. Include specific examples.

Degree assessments are continually used to improve the Marketing degree program.

Given the limited sample size of the senior marketing student group taking the standardized Major Field Test (MFT) in Spring 2018 (4 students) and Fall 2017 (1 student), MFT results may not be entirely accurate. However, faculty will continue to monitor MFT scores.

Quantitative Integrative Knowledge

In the interim, faculty have emphasized quantitative methods and orientation, an area requiring improvement, as follows:

- via the integration, in both Common Professional Component classes of Management Information Systems MGMT 280 and Operations and Business Analytics MGMT 371, of more quizzes, graded homework as evidence of textbook reading, required subscription to online study material, and Increased Excel practice
- through MRKT 480's market research project via SPSS and statistical survey analysis
- in the introductory MRKT 281, where students begin to analyze cases with financial data, and calculate and interpret market/brand potential, market share, basic cost data, mark-up pricing, and the financial impact of intermediary involvement in the marketing channel
- with the introduction and integration of case or computer simulation software in MRKT 381 Consumer Behavior, MRKT 388 Retail Management, and MRKT 281 Marketing Principles and Strategy, with plans for simulation exercises for MRKT 387 Advertising Management (Spring 2019)

Importantly, making BUSN 101 Freshman Seminar, compulsory effective Fall 2018, also serves to initiate students to a quantitative perspective, requiring mathematical calculations of GPA, cumulative GPA, and algebraic determination of final exam scores to reach final grade and other targets, as well as basic business mathematics relative to personal finance.

Global Learning

To continue to assist in preparation for the MFT, more global marketing content has also been added to MRKT 281, which, for many non-Marketing students, may be their only Marketing course of their undergraduate studies. This introductory Marketing course therefore covers all of the marketing topics identified in the MFT.

Civic Learning

Sports and Events Marketing MRKT 379 continues to reinforce civic responsibility and enhance community well-being, as students are required to plan, organize, fundraise, market and host

events to benefit local organizations or charities of their choice: a significant component of their total grade. For Fall 2018, this class begins work on a proposal to introduce e-sports as a varsity or extracurricular sport at the University, further enhancing stakeholder involvement and civic-mindedness.

BUSN 101 now shares the responsibility for civic involvement, with the class participating in event planning (Time Capsule, Nov. 2, 2018) to communicate and commemorate their freshmen experiences for posterity, and to celebrate with the university community, PAB, and alumni. This civic requirement is planned for every fall semester BUSN 101 class.

Contemporary Content

Given the transition in marketing from traditional methods and outlets to more mobile, digital, online, and omnichannel promotion and distribution, faculty have introduced specific courses, MRKT 383, 384, and 386 (Digital Marketing, Social Media Marketing, Mobile Marketing) to address that emergence and growth. The speed with which contemporary marketing has changed, and will evolve, demands continuous integration of new material and practice in the curriculum. For Spring 2019, as an example, MRKT 387 Advertising Management, on a 2- to 3-year rotation, will be significantly updated to reflect social media and metrics, content marketing, and analytics.

Specialized Knowledge: Certificates

During the Fall 2018 semester, certificates were approved for both International Marketing and e-Marketing, allowing Business and non-Business students alike, along with the potential of community members, to benefit from this concentrated delivery and specificity.

Under consideration by faculty, and supported by the School's Professional Advisory Board (PAB), is the possibility of other specialized certificates within the Lukenda School of Business: a minimum 12-credit package of courses specializing in such areas as Marketing Analytics, Personal Selling, Event Planning, and Customer Service. These would prepare and help to market graduates for entry-level positions in such industries. Other possibilities, which utilize the talent and resources of PAB members, include Financial Services and Real Estate Marketing/Appraisal.

Applied and Collaborative Learning: Marketing Club

Fall 2017 semester marked the debut of a student-run Marketing Club (faculty supervision from Prof. Valerie Philips), with 9 members as at Fall 2018 (+40% vs. Fall 2017). This both extra- and co-curricular club now has greater access to community-based marketing challenges from a variety of stakeholders. In just one year, the Marketing Club developed a slogan/tagline and logo for Lake Superior State University, and presented to the Cabinet; then-President Mitchell announced in a campus-wide forum that this tagline would be adopted. Other projects have involved local restaurants, Prof. Jody Rebek's MGMT class rebranding, social marketing within the community, and charitable organizations including Chippewa Counties that Care. Such involvement reinforces

the theme and skill of team-building to drive effective marketing decision making, and further enhances the marketability of these students. The Marketing Club will compete in the American Marketing Association conference in April 2019.

Broad and Integrative Knowledge

The Marketing Club assists in reinforcing applied and collaborative learning, as well as civic sensitivity and learning.

Similarly, Dr. Wilhelms' MRKT 480 class recently conducted focus groups at the local high school as a sound basis for planning a campaign to increase enrollment in the Lukenda School of Business. After securing Dean approval in November 2018, these students will present to senior administration, and actually administer their recommendations in March and April 2019. These experiences are unique to a smaller school like the Lukenda School of Business, and add to the quality of education received here.

Internships

Internships are continually encouraged, although not required. In the 2016/2017 and 2017/1018 academic years, Prof. Philips supervised 15 and 9 internships, respectively. These 24 internships continue to develop entry-level, employability skills for graduates. However, to ensure control and academic rigor of all Lukenda School of Business programs, faculty recently established a policy for students to earn up to a maximum of 4 credits for each of BUSN 299 and BUSN 399.

Importantly, many internships are reprisals of popular events conceptualized in past MRKT 379 Sports and Events Marketing classes (eg. RibFest, SnowBall Tournament, Swishes for Wishes, etc.) The willingness of students to improve on past work, to continue to connect with their community, and to produce proceeds for others deserving of it, suggest that students are active learners of civic issues and ethics. Further, two of last year's marketing graduates, who pursued event internships, are now employed as event planners.

Collaborative Learning

Prof. Valerie Philips ensures that students in all team projects must evaluate their own and others' contributions in a formal peer-evaluation process. This attempts to obviate the abuse of others' efforts, and reinforces the importance of the work ethic and collaboration in the work place.

Online Delivery

Consistent with technology, and to fulfill the needs of students pursuing a Marketing minor at the regional centers, many classes are now available online, with 100% of summer Marketing classes corresponding to this mode of delivery.

Quality, Resources and Support (CC 3.A)

3. Explain how the program ensures that degree program-level and course-level learning outcomes are at an appropriate level. Attach evidence, including a degree audit for the program.

Overview

The Bachelor of Science, Business Administration – Marketing program, like all other programs in the Lukenda School of Business, benefits from a School-wide revision to the Common Professional Core (CPC), strengthening it and linking it to the subject areas covered in the MFAT. This consensual decision-making occurred several academic years ago, and affected all programs. Accordingly, at that time faculty made adjustments to the initial goals set during previous years, and now continue to work diligently to assess the appropriateness of program delivery across all majors.

Given the strong scores of Lukenda School of Business graduates, relative to other students from myriad institutions writing the MFT, faculty are confident that entry-level competences, degree-level outcomes, and course-level outcomes are appropriate.

Attached are the Marketing program degree audits from Fall 2018 and Fall 2015.

Note in the previous section how recent changes relate to The Lumina Foundation's Degree Qualification Profile (DQP), as indicated previously: specifically, the revision of the CPC to include BUSN 101 Freshman Seminar and enhanced measures to deliver to students greater quantitative exposure, access to "real life" or community-based projects, responsibility for both written work and oral presentations across diverse audiences of stakeholders, and team accountability in Marketing classes.

Courses

The B.S. in Business Administration – Marketing include (a) Major Requirements, and (b) Marketing Electives, with these Marketing courses corresponding to the following ratings:

Key

Where 1 = specialized knowledge, 2 = broad and integrative knowledge, 3 = intellectual skills, 4 = applied and collaborative learning, 5 = civic and global leadership (Source: DQP)

Where A = research, B = summative team or individual project, C = presentation, D = work with industry partner, E = work with charity or non-profit entity

Where {AWARE} = Awareness, {KNOW} = Basic Knowledge, {COMP} = Comprehension/Comprehensive

Major Requirements

MRKT 381 Consumer Behavior: 1, 4, 5 (A, B, C) {COMP}

MRKT 480 Marketing Research: 2, 3, 4, 5 (A, B, C, D) {COMP}

MRKT 481 Marketing Management: 1, 2, 3, 4, 5 (A, B, C, D) {COMP}

Marketing Electives

MRKT 283 Principles of Selling: 1 (B, C) {AWARE}

MRKT 379 Sports and Events Marketing: 1, 4, 5 (B, C, E) {KNOW}

MRKT 383 Digital Marketing: 1, 4, 5 {KNOW}

MRKT 384 Social Marketing: 1, 4, 5 {KNOW}

MRKT 385 Services Marketing: 1, 2, 4, 5 (B, C, D or E) {COMP}

MRKT 386 Mobile Marketing: 1, 4, 5 {KNOW}

MRKT 387 Advertising Management: 2, 3, 4 (B, C, D or E) {KNOW}

MRKT 388 Retail Management: 1, 2, 4, 5 (A, B, C, D or E) {COMP}

MRKT 389 Entrepreneurship: 2, 5 (A, B, C) {KNOW}

INTB 486 International Marketing: 1, 2, 3, 4, 5 (A, B, C) {COMP}

**B.S. in Business Administration - Marketing
Degree Audit**

Name _____

A# _____

Intended graduation month/year ____/____

Advisor Approval _____

Degree Requirements

Common Professional Core (48 credits)

ACTG132	4	_____	_____
ACTG133	4	_____	_____
BUSN121	3	_____	_____
BUSN211	3	_____	_____
BUSN231	3	_____	_____
BUSN350	3	_____	_____
BUSN403	3	_____	_____
BUSN466	3	_____	_____
ECON201	3	_____	_____
ECON202	3	_____	_____
FINC341	4	_____	_____
MGMT280	3	_____	_____
MGMT360	3	_____	_____
MGMT371	3	_____	_____
MRKT281	3	_____	_____

Major Requirements (minimum 31 credits)

MRKT381	3	_____	_____
MRKT480	3	_____	_____
MRKT481	3	_____	_____
MATH111	3	_____	_____
BUSN101	1	_____	_____

Four Marketing Electives (12 credits)*

_____	3	_____	_____
_____	3	_____	_____
_____	3	_____	_____
_____	3	_____	_____

*Electives in Marketing, INTB486, or COMM320

General Education Requirements

(Minimum 34 credits)

Oral & Written Communication (min. 9 credits)

ENGL110	3	_____	_____
ENGL111	3	_____	_____
COMM101, COMM201 or COMM225	3	_____	_____

Mathematics (minimum 3 credits)

MATH111 3 Satisfied thru major req.

Social Science (minimum 6 credits)*

BUSN121 3 Satisfied thru core course
ECON201 3 Satisfied thru core course

Natural Sciences (w/lab) (minimum 7 credits)*

_____ 3-4 _____
_____ 3-4 _____

Humanities (minimum 6 credits)*

_____ 3-4 _____
_____ 3-4 _____

Cultural Diversity (minimum 3 credits)

_____ 3 _____

***2 courses from different disciplines (subjects) or
2 from interdisciplinary**

Two Business Electives (6-8 credits)**

_____ 3-4 _____
_____ 3-4 _____

**Electives in 300/400 level courses in BUSN, MGMT,
ECON, FINC, ACTG, INTB.

Electives (to reach 124 credits)

_____ _____
_____ _____
_____ _____

I certify that all departmental requirements are complete and
the departmental grade point average is 2.0 or higher.

_____ At least 124 credits
_____ Residency - 30 hours
_____ 2.0 GPA
_____ 2.0 GPA in dept'l requirements

X _____
Department Head, Lukenda School of Business

Lukenda School of Business
Business Administration - Marketing
- Bachelor of Science Degree -

Sample Program

FALL		SPRING		
<u>First Year</u>				
ACTG 132	Principles of Accounting I	4	ACTG 133 Principles of Accounting II	4
ENGL 110	First-Year Composition I	3	BUSN 211 Business Statistics	3
MATH 111	College Algebra	3	ENGL 111 First-Year Composition II	3
BUSN 121	Introduction to Business	3	COMM 101 Fund. of Speech Communication	3
	Elective	3	Gen Ed Natural Science	3-4
		16		16-17
<u>Second Year</u>				
BUSN 350	Business Law I	3	MGMT280 Intro. To Mgmt Info. Systems	3
BUSN 231	Business Communications	3	ECON 202 Principles of Microeconomics	3
ECON 201	Principles of Macroeconomics	3	Gen Ed Humanities Elective	3
HUMN 251	Humanities I	4	Marketing Elective	3
MRKT 281	Marketing Principles & Strategies	3	Business Elective	3
		16		15
<u>Third Year</u>				
FINC 341	Managerial Finance	4	MGMT 360 Mgmt Concepts and Applications	3
BUSN308	Managing Cultural Differences	3	Marketing Elective	3
MRKT 381	Consumer Behavior	3	Business Elective	4
Gen Ed	Natural Science with lab	4	Electives	6
		14		16
<u>Fourth Year</u>				
BUSN 403	Business, Government & Society	3	BUSN 466 Business Policy	3
MRKT 480	Marketing Research	3	MRKT 481 Marketing Management	3
	Marketing Elective	3	MGMT 371 Operations/Business Analytics	3
	Electives	6	Marketing Elective	3
		15	Electives	3
				15
<u>Marketing General Education and B.S. Degree Requirements</u>				
Oral & Written Communication (6 cr. Min.): ENGL110 & either ENGL111 or (COMM101, COMM201, or COMM225)				
Mathematics (3 cr. Min.): One course in Mathematics (MATH110 or higher)				
Social Science (6 cr. Min.):* BUSN121, ECGE100, ECON201, ECON202, ECON302, GGGE100, GEOG201, GEOG302, HIST101, HIST102, HIST131, HIST132, HSGE100, POLI110, POLI160, PLI241, PSGE100, PSYC101, PSYC155, PYGE100, SOCY101, SOCY102, SOCY113, SOGE100.				
Natural Sciences (7 cr. Min., one with lab)*: BIOL104, BIOL105, BIOL122, BIOL131, CHEM108 & CHEM 109, CHEM110, CHEM115, CHEM116, GEOG106, GEOG108, GEOL115, GEOL121, GEOL122, NSGE100, NSCI101, NSCI102, NSCI103 & NSCI104, NSCI110, NSCI116, NSCI119, PHYS221, PHYS231.				
Humanities (6 cr. Min.):* ARTS250, ARTS251, ENGL180 (eff. Summer 2015), HUGE100, HUMN203, HUMN240, HUMN251, HUMN252, HUMN255, MUSC220, MUSC221, PHIL302, PHIL305. A second year (6-8 credits) of foreign language may be used as one course.				
Oral & Written Communication (3 cr. Min.): One additional course in ENGL (ENGL111) or COMM (COMM101, COMM201 or COMM225) to total at least one year of composition and one semester of communication.				
Cultural Diversity (3 cr. Min.): BUSN308, EDUC250, ENGL235 (eff. Summer 2015), ENGL236 (eff. Summer 2015), GEOG306, HIST203, HLTH328, POLI234, POLI334, SDGE100, SOCY103, SOCY213, SOCY225, SOCY321.				
*from 2 different disciplines or 2 interdisciplinary				

**B.S. in Business Administration - Marketing
Degree Audit**

Name _____

A# _____

Intended graduation month/year ____/____

Advisor Approval _____

Degree Requirements

General Education Requirements

(Minimum 34 credits)

Common Professional Core (48 credits)

ACTG132	4	_____	_____
ACTG133	4	_____	_____
BUSN121	3	_____	_____
BUSN211	3	_____	_____
BUSN231	3	_____	_____
BUSN350	3	_____	_____
BUSN403	3	_____	_____
BUSN466	3	_____	_____
ECON201	3	_____	_____
ECON202	3	_____	_____
FINC341	4	_____	_____
MGMT280	3	_____	_____
MGMT360	3	_____	_____
MGMT371	3	_____	_____
MRKT281	3	_____	_____

Major Requirements (minimum 30 credits)

MRKT381	3	_____	_____
MRKT480	3	_____	_____
MRKT481	3	_____	_____
MATH111	3	_____	_____

Four Marketing Electives (12 credits)*

_____	3	_____	_____
_____	3	_____	_____
_____	3	_____	_____
_____	3	_____	_____

*Electives in Marketing, INTB486, or COMM320

Oral & Written Communication (min. 9 credits)

ENGL110	3	_____	_____
ENGL111	3	_____	_____
COMM101,			
COMM201 or	3	_____	_____
COMM225			

Mathematics (minimum 3 credits)

MATH111 3 Satisfied thru major req.

Social Science (minimum 6 credits)*

BUSN121 3 Satisfied thru core course
ECON201 3 Satisfied thru core course

Natural Sciences (w/lab) (minimum 7 credits)*

_____	3-4	_____	_____
_____	3-4	_____	_____
_____	3-4	_____	_____

Humanities (minimum 6 credits)*

_____	3-4	_____	_____
_____	3-4	_____	_____

Cultural Diversity (minimum 3 credits)

_____ 3 _____

***2 courses from different disciplines (subjects) or
2 from interdisciplinary**

Two Business Electives (6-8 credits)**

_____	3-4	_____	_____
_____	3-4	_____	_____

**Electives in 300/400 level courses in BUSN, MGMT, ECON, FINC, ACTG, INTB.

Electives (to reach 124 credits)

_____	_____	_____
_____	_____	_____
_____	_____	_____

I certify that all departmental requirements are complete and the departmental grade point average is 2.0 or higher.

_____ At least 124 credits
 _____ Residency - 30 hours
 _____ 2.0 GPA
 _____ 2.0 GPA in dept'l requirements

X _____
 Department Head, Lukenda School of Business

Lukenda School of Business
B.S. in Business Administration - Marketing
Degree Audit

Name _____

A# _____

Intended graduation month/year ____/____

Advisor Approval _____

Degree Requirements

Common Professional Core (48 credits)

ACTG132	4	_____	_____
ACTG133	4	_____	_____
BUSN121	3	_____	_____
BUSN211	3	_____	_____
BUSN231	3	_____	_____
BUSN350	3	_____	_____
BUSN403	3	_____	_____
BUSN466	3	_____	_____
ECON201	3	_____	_____
ECON202	3	_____	_____
FINC341	4	_____	_____
MGMT280	3	_____	_____
MGMT360	3	_____	_____
MGMT371	3	_____	_____
MRKT281	3	_____	_____

Major Requirements (minimum 31 credits)

MRKT381	3	_____	_____
MRKT480	3	_____	_____
MRKT481	3	_____	_____
MATH111	3	_____	_____
BUSN101	1	_____	_____

Four Marketing Electives (12 credits)*

_____	3	_____	_____
_____	3	_____	_____
_____	3	_____	_____
_____	3	_____	_____

*Electives in Marketing, INTB486, or COMM320

- _____ At least 124 credits
- _____ Residency - 30 hours
- _____ 2.0 GPA
- _____ 2.0 GPA in dept'l requirements

General Education Requirements

(Minimum 34 credits)

Oral & Written Communication (min. 9 credits)

ENGL110	3	_____	_____
ENGL111	3	_____	_____
COMM101,			
COMM201 or	3	_____	_____
COMM225			

Mathematics (minimum 3 credits)

MATH111 3 Satisfied thru major req.

Social Science (minimum 6 credits)*

BUSN121 3 Satisfied thru core course
 ECON201 3 Satisfied thru core course

Natural Sciences (w/lab) (minimum 7 credits)*

_____	3-4	_____	_____
_____	3-4	_____	_____
_____	3-4	_____	_____
_____	3-4	_____	_____

Humanities (minimum 6 credits)*

_____ 3-4 _____
 _____ 3-4 _____

***2 courses from different disciplines (subjects) or 2 from interdisciplinary**

Two Business Electives (6-8 credits)**

_____	3-4	_____	_____
_____	3-4	_____	_____

**Electives in 300/400 level courses in BUSN, MGMT, ECON, FINC, ACTG, INTB.

Electives (to reach 124 credits)

_____	_____	_____
_____	_____	_____
_____	_____	_____

I certify that all departmental requirements are complete and the departmental grade point average is 2.0 or higher.

X _____
 Department Head, Lukenda School of Business

Intellectual Inquiry (CC 3.B).

4. Explain what the program does to engage students in collecting, analyzing, and communicating information; mastering modes of inquiry or creative work; developing skills integral to the degree program. Attach examples of undergraduate research, projects, and creative work.

Note that 300- and 400-level Marketing classes share the commonality of junior- and senior-level semester projects. This is reinforced and feasible given our smaller class size and one-on-one relationships with students.

All students must also complete an individual capstone senior project in BUSN 466 Business Policy, integrating all elements of strategic planning (including marketing strategic planning), and development of a viable business plan. The curriculum engages students and provides ample opportunity and practice to exercise critical thinking, analysis, and synthesis.

Examples of student work are appended.

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Student work: Marketing Plan for Product in a Foreign Country
This documentation is relevant to Question number: Intellectual Inquiry (CC 3.b) #4	Intellectual Inquiry (CC 3B) #4
Briefly summarize the content of the file and its value as evidence supporting program review:	Team project in International Marketing (INTB 486) illustrating intellect, and ability to collect, analyze, and apply learning

BELGIUM

An effective strategy for Guayaki brand to successfully infiltrate the Belgian market.



LSSU Spring Semester 2017

INTB 486

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Executive Summary

Located in the heart of Europe, Belgium is the smallest, most densely populated country. With the general population generally represents Europe as a whole, which makes it an excellent test market. Guayaki brand Yerba Mate will initially create a subsidiary in Brussels, home to many international organizations, where it will first infiltrate the Belgian market before expanding regionally.

Belgium is said to have a very good business environment as well as being stable and efficient. Aside from some government restructuring, minimal risk comes with housing a subsidiary in Belgium. Belgium has welcomed hundreds of US firms within its borders and shows them exceptional hospitality. With virtually no tariffs or trade barriers on mate, importing products to the country should prove to be a fairly simple task. This will be a huge benefit due to the intense competitive pricing experienced within the market.

The remarkable health benefits of yerba mate paired with the caffeinated qualities prove to align perfectly with current trends in the marketplace. The target market proves itself to be culturally receptive to new products that are advertised well. Social media, old fashioned communication techniques, as well as guerilla tactics, will all be employed to gain customer awareness and acceptance. Working with local businesses for shelf space will prove to be invaluable.

With three predominant cultural groups within Belgium itself, Guayaki has to pay a certain amount of attention to each group. Belgian consumers have also become more and more aware of different flavors, which will prove to be an important market research area. There is an abundance of information available regarding Belgium and assistance with establishing businesses within its boundaries. In the preceding pages you will find an outline best suited for the Guayaki brand Yerba Mate products to be successful in the Belgian market.

Cultural Analysis

Belgian Society & Culture

Belgium is not a homogeneous country with one national identity. Because of this fact, it is difficult to give a general overview that applies to all Belgians. Each area has its own

particularities. There are three predominant cultures that shape Belgium: Flanders (Dutch) in the north, Wallonia (French in the south, and the area in the northeast of Belgium is influenced by the German culture. Despite these diverse backgrounds and cultures, there are some aspects of the Belgian culture that are applicable to all areas.

Geographical Setting

Belgium is part of the Roman province of Belgium, which is named after the Belgae, a people of ancient Gaul. The area, which consists of about 40 miles of seacoast on the North Sea and only about the size of Maryland, was conquered by Julius Caesar in 57-50 B.C. and repeatedly taken over throughout history. This has led to the lack of a national identity.

Belgium is located in Western Europe and borders France, Germany, Luxembourg, and the Netherlands. Belgium's location gives it a "maritime" climate that is influenced by the North Sea and the Atlantic Ocean. This gives Belgium mild winters and cool summers. Though this country is small in size, it has three distinct geographical regions. The coastal plain in the northwest, which consists mainly of sand dunes and polders (areas of land at or below sea level that have been reclaimed from the sea by dikes). Then it has the central plateau; this area is a smooth slowly rising area that contains many fertile valleys and is irrigated by many waterways. The final geographic region is called the Ardennes. This rugged area is a thickly forested plateau and is not very good for farming; it extends into northern France and Germany.

Belgium is essentially a country of a medium size with small cities, many with long histories. This country is one of the most urbanized and densely inhabited countries in the world with about 97 percent of the 11 million inhabitants living in cities. Brussels, the capital, has approximately one million of those residents.

Belgium has the highest density of roads and railroads in the world. The longest tramway line in the world is the Belgian coast tram (68 km), which operates between De Panne and Knokke-Heist, from the French border to the Dutch border. Belgium also has an extensive waterway system both natural and artificial. This allows for the efficient transportation of goods and people.

Social Institutions

Family is very important and is a person's first priority; Belgians primarily remain in the town they were raised in with close extended families. There are no social or ethnic barriers to marriage. Belgium was the second country to legalize gay marriage, and they have a ban on forced marriages. In recent years, young people marry and have children less often, and the divorce rate has increased to about one in three marriages.

A "domestic unit" is composed of the parents and up to three children. Women do more of the domestic work, but this is a matter that is negotiated between the couple. Women are also not expected to change their name when they marry. Belgium also has laws governing paternity leave as well as maternity leave.

The values that parents try to instill in their children are honesty, good manners, tolerance, and responsibility. There are regional and class differences: obedience and cleanliness are considered more important to Flanders; loyalty and courage are important in Wallonia; and independence and autonomy are more appreciated in Brussels and among university graduates.

All private and public schools are supported by the state, and education is virtually free. Access to the best schools depend on grades, language, location, and social position. Children must remain in full-time education until age sixteen and in part-time until eighteen. Higher education is federalized and is conducted in the language of the individual region. According to the European Commission, the policy of low tuition fees and open enrollment leads to a high participation rate in higher education; 42.2% of the population aged 24-29 had obtained a degree in higher education in Belgium compared to an EU average of 31.6%.

There is a relatively even distribution of wealth. The majority of the population is middle class; this allows for equal opportunities for education and professional life. The occupational gender gap is decreasing; this is particularly true among younger generations. The wage differences between men and women are the lowest in the European Union. Women earn, on average, 91 percent of a man's salary. Belgium also has the highest proportion of female ministers in the world and was one of the first to have a female parliamentarian in 1921.

Deep societal cleavages have led to the construction of pillars, or integrated social structures based on ideology. This system has become less important in recent years, but its

influence is still noticeable. These pillars encompass every aspect of societal life, including youth, sports and leisure movements, education at all levels, trade unions, health funds, newspapers, and political parties. The three main pillars consist of the Christian-democrat pillar, the socialist pillar, and the liberal pillar.

Belgium is a federal state that consists of three language communities that are responsible for the control of culture, education, economic development, infrastructure, and environment. This complex structure has resulted from the demands for more cultural autonomy in each language community as well as demands over control for local economic development. The major political parties are the Liberals, Socialists, and Christian-Democrats. The political system is based on discussion and compromise between the different groups. The term "Belgian compromise" applies to solutions that are reached in this way. Complex issues are decided by conceding something to every party. These complex agreements will many times leave room for interpretation. Politicians often rise through the pillars. Belgium has enforced compulsory voting and has the highest tax rates in the world. Belgians pay around 40 percent of their gross earnings in taxes.

Belgian law is modeled on the French legal system. The judiciary branch is an independent branch of government that is on equal footing with the legislative and the executive branches.

Policing and judiciary system is at a national level. There is one police force with authority to operate in the entire nation. There are some issues with the lack of bilingual magistrates. Organized crime is rare; of the organized crime that does exist, it is mostly controlled by foreign criminals, such as the Russian mafia. There are very few murders, and the most common crime is property theft.

Belgium is a member of NATO, and its military forces are completely integrated into the alliance. The military is professional and separated from the rest of society under strict parliamentary control. Belgium hosts many international organizations and hundreds of lobbying groups, but they have little direct impact on social life. The most influential organizations are the Catholic Church, its affiliates, and social organizations related to the pillars, such as trade unions.

Religion and Aesthetics

Catholicism is the main religious faith with 58% of the population. The government financially supports many different faiths including the Catholic, Protestant, Jewish and Muslim faiths. The Catholic Church controls a network of schools with 70 percent of the pupils in secondary education and two main universities. Approximately 65 percent of Belgians believe in God.

Belgium offers support to aspiring artists and musicians. They receive training in evening schools that are free of charge and accessible to most of the country. There are also many state-supported postsecondary conservatories and art schools. The government also supports several theaters and orchestras.

Belgian writers have contributed to important literary movements such as symbolism, surrealism and magic realism. Important themes are the hardness of life, the questioning of reality, and the quest for original ways to get through life. The distrust of authority is one central to one of the oldest Flemish tales, *Reynard the Fox*, in which the small fox outsmarts the larger animals.

Living Conditions

During the nineteenth century many working-class cities were built in mining and industrial areas. In some cities, new middle-class suburbs are linked to urban centers by large avenues. Today, as the population leaves the central cities, one-family houses are organized in small suburban villages. In the northern area of the country, there are many isolated farms between villages.

Bread and potatoes are traditional staple foods. Most meals contain meat such as pork, chicken, beef, or seafood. The national drink is beer. Belgians enjoy over 800 kinds of beer and consume an average of 150 liters of beer per person per year. Belgium is renowned for its bakeries and claim to have invented chips (French fries). Local specialties include *cramique* (a rich, sweet breakfast bread with raisins); *cougnon* or Bread of Jesus (a rich brioche-type of bread shaped to resemble a swaddled infant); and tarts. Belgium produces 220,000 tons of chocolate per year. They have the lowest proportion of McDonald's restaurants per inhabitant, it has 7 times fewer than the United States and 2 times less than France. Belgium also imports large quantities of wine. Cooking is traditionally done with butter rather than oil. They also

consume a high amount of dairy products. Immigration has ensured a diversity of “ethnic” restaurants, and this has led to a change in the eating habits of the residents in culturally mixed areas.

Cleanliness is of importance, and they take great pride in their houses and yards. An unkempt property would be an insult to their neighbors and disgrace their families. They also take great pride in their personal appearance and are concerned with the impression they make on others. Belgians socialize in restaurants and their homes, but they generally reserve their homes for family and close friends. If you are invited to a home it is polite to bring a gift. Older Belgian hostesses may expect flowers. Flowers should be given in odd numbers, but not 13. Do not give white chrysanthemums as they signify death. Liquor or wine should only be given to close friends. Good quality chocolates is another popular option.

A series of Public Centers of Social Aid (CPAS) exist in the cities that support impoverished residents. There is also a ministry of social promotion that supports initiatives for the reduction of inequality. Belgium has a modern health system with state, university, and private hospitals. Health insurance is mandatory and is paid for by employers. Self-employed people must have insurance for major risks and pay according to their income. There is also a very inclusive social security system.

Belgium has a large number of leisure and entertainment options. There is a lively nightlife and social scene in the cities. There are a large number of bars, clubs, theaters, and concert halls. Brussels is home of the Belgium National Orchestra and Philharmonic Society. There is also a great many museums throughout the country showcasing the rich historical heritage of Belgium.

Belgians are very keen on sports, particularly football (soccer) and cycling. Sports complexes can be found in most local communities and many feature state of the art swimming pools. Brussels has the world’s deepest swimming pool, which reaches 35 meters in depth. It is a practice ground for scuba divers.

Languages

The official languages are French, Dutch, and German with French and Dutch being the languages learned in school. The local variant of Dutch is Flemish and is used by more than 60

percent of the population. Approximately 10 percent of their population are non-natives and bring a variety of languages to Belgium as well. There are approximately 1.6 million people in Belgium that are immigrants or children or grandchildren of immigrants. After Canada, Belgium grants the most new citizenships per capita in the world.

Etiquette

Greetings in Belgium involve a degree of formality. A brief handshake is common greeting among people that do not know each other. As a relationship develops, three kisses on the cheek may replace the handshake. This is more of an air kiss near the person's cheek, starting with the left cheek and alternating. Men never kiss other men; they will always shake hands.

If you receive a written invitation, the response must also be written. It is also important to wait for your host or hostess to introduce you to the other guests. Arrive on time because punctuality demonstrates respect. Women take their seats before men, and the utensil manners are Continental Style: the fork is held in the left hand and the knife in the right while eating. It is also polite to keep the wrists above the table while eating. Never leave food on your plate; it is considered both rude and wasteful. Belgians take pride in their cuisine, so praising a meal is a sincere compliment.

It is also a good idea to wait and see if your host is offering a toast before slipping your drink. The guest of honor may also offer a toast. It is polite to stand for a toast, and the Flemish raise their glasses twice during a toast. The glass is initially raised during the toast and then at the completion of the toast.

It is not necessary to have third-party introductions, but they will often smooth the way. It is important to always be polite and well mannered. Belgians are careful and prudent and take time before they trust others. The first appointments are more socially oriented than business oriented because Belgians prefer to do business with those they know. It is necessary to make appointments, and the person you are meeting will generally set the time for the meeting, usually mid-morning or mid-afternoon. Meetings are formal. Try to avoid scheduling meetings during July and August because they are prime vacation times. The week before

Easter and the week between Christmas and New Year's should be avoided for the same reason. Everyone is expected to arrive on time, and arriving late may brand you as unreliable.

Belgians take pride in their appearance, dress conservatively, and expect you to do the same. Men should wear dark colored, conservative business suits with white shirts and silk ties. Women should wear business suits or conservative dresses. Men should only wear polished, laced shoes; they are an integral part of the professional image. Loafers or other slip-ons should not be worn as they are considered too casual. Do not remove your jacket during a meeting. Business cards are exchanged without formal ritual. It is suggested that one side of the business card be translated into French or Dutch to show respect for the linguistic heritage.

Geert Hofstede Scores

Geert Hofstede's six cultural dimensions offers a different way to look at and compare cultures. The first one Power Distance. This dimension expresses the degree to which the less powerful member of society accept and expect that power is distributed unequally. Belgium is high on this scale at a score of 65. This means that in Belgium inequalities are accepted. The attitude toward managers is more formal and the flow is hierarchical. The opposite is true in the United States. The Power Distance is at 40, this implies that in the US it is expected that there be more equality between societal levels.

The second dimension is Individualism. Both countries place high on this dimension, the US is at 91 and Belgium is at 75. This means that both countries are focused on taking care of themselves and the immediate family rather than belonging to a group.

The third dimension is Masculinity. Belgium has an intermediate score (54) on this dimension and they are balanced in the middle. The United States is at a 62 which means that a higher degree of gender differentiation of roles. The male dominates a significant portion of the power structure.

Uncertainty avoidance measures the extent to which the people of the culture feel threatened by unknown situations and have created beliefs and institutions that try to avoid these. Belgium has one of the highest scores for this dimension (94). This is explained by their history of frequently being ruled by others. They try to reach certainty through academic work and structure. Planning is favored and change can be stressful. The United States is lower in this

dimension at 46. This means that the US society has fewer rules and does not attempt to control all outcomes and results.

The next dimension Long-Term Orientation describes how the culture maintains some links with its past to deal with the challenges of the present and future. Belgium is high in this dimension with a score of 82. This means that they adapt traditions easily to changed conditions, have a strong propensity to save and invest. The United States is low in this score at 26, this means that people in the US tend to have strong ideas about what is "good" and "evil" and view societal change with suspicion.

The final dimension is Indulgence. This measures the extent to which people try to control their desires and impulses. Both cultures scored as indulgent, Belgium (57) and the US (68). This means they both place a high degree of importance on leisure time and are willing to express their impulses and desires with regard to enjoying life and having fun.

Negotiation Style

Belgians tend to be skilled but sympathetic negotiators. They also have a flexible approach in order to forge win-win deals; this is where the reputation of the "Belgian compromise" comes from. Though the resulting agreement may not be the ideal solution, everyone will come out with their pride intact.

The negotiation style of the Belgium is a little more formal than that of a typical American meeting. The dress is also more formal. The people of Belgium take great pride in their appearances and they expect the same from the people that they meet with. Although Belgians are more direct in their communication than many cultures, they tend to prefer subtlety over directness. They believe that subtlety is a reflection of intelligence. They prefer communication to be logical and based on reason. Belgians often engage in long, critical discussions before reaching a decision, so that they can be sure that they have considered all the alternatives. Business dealings tend to be bureaucratic and involve a great deal of paperwork. Belgians also believe that it is rude to be confrontational, and they prefer to take their time to work out issues. It takes time to find an arrangement that is satisfactory to both sides; Belgians are creative in their solutions and many times unconventional. Make sure that there is enough time for this process and don't rush it.

The general Belgian attitude toward negotiations is exploratory, and at the beginning, non-committal. They use a problem-solving approach and attempt to build bridges between divergent interests. They will be receptive to ideas that make basic sense. The business people of Belgium tend to want to build relationships with the people that they will be doing business with. They have excellent listening skills, but do not take that as a sign that they agree with what is being discussed.

Most of the body language is similar to the United States, for example eye contact is expected in both cultures. Shaking hands is also appropriate in both cultures, the slight difference here is that in Belgium you would shake hands with everyone present and that includes children. The personal space bubble is smaller in Belgium. It is more at an arm's length whereas in the US it is more like two to three feet. The US also shares the same value of being on time. It is important in both cultures to be on time as it shows respect and reliability.

Belgians are excellent linguists and many are sufficiently fluent to conduct meetings in English. At most you may find it necessary to have a French or Dutch interpreter present. When it comes to intercultural communication, what is acceptable in one culture may be offensive in another. There is no culture that is right or wrong, better or worse, they are just different. In today's global business community, there is no single best way of communicating with one another; the key to cross-cultural success is to develop an understanding of and a deep respect for the differences.

Economic Analysis

Population and Geography

Belgium is one of the smallest, most densely populated countries in Europe (Encyclopaedia Britannica, 2017). According to 2014 statistics, the majority of individuals live in urban areas with only 2.4% of the population living in rural areas (Encyclopaedia Britannica, 2017). These populated areas encompass most of the northern region with the southeast being more thinly populated (Central Intelligence Agency, 2017).

Statistical data from 2016 indicates a population of 11,409,077 with women (51%) slightly outnumbering men (49%) with the following approximate age breakdowns: 17% is 15 and under, 11% is between 15 and 24, 40% is between 25 and 54, 13% is between 55 and 64,

and 18% is over 65. (Central Intelligence Agency, 2017) According to 2010 statistics, life expectancy at birth is 77.4 years for males and 82.7 years for females (Encyclopaedia Britannica, 2017). The birth rate of 11.4 births/10000 population is currently slightly higher than the death rate of 9.7 deaths/1000 population (Central Intelligence Agency, 2017).

Brussels is the biggest metropolitan area in Belgium, but in regards to the most populous city in term of residents within city limits, it comes in fifth. Statistical data from World Atlas (2016), using numbers in terms of residents within city limits notes the top five most populated cities in Belgium are Antwerp (517,042), Ghent (257,029), Charleroi (202,182), Liège (196, 970), and Brussels (178,552). The order completely changes when including the whole metropolis population: Brussels (1,789,447), Antwerp (940,671), Liège (633,934), Ghent (416,493), and Charleroi (403,868) (worldatlas.com, 2016).

Economics

Belgium is known as a free-enterprise economy. In this type of economy, the products, prices, and services are determined by the economy itself, not the government. Businesses are free from government control and must heed the effects of supply and demand. The economy is highly tied to the economy of Europe as it is part of the Eurozone. Gross domestic product (GDP) is mainly generated in the service sector. With \$508.6 billion in GDP (purchasing power parity) in 2016, Belgium ranked 38 in the world country comparison (Central Intelligence Agency, 2017). In 2015, the most important sectors in Belgium's economy public administration, defense, education, human health and social work activities, wholesale and retail trade, transport, accommodation and food services and Industry (Europa, 2015). A study of land use established in 2011 that Belgium devoted 44.1% of land to agriculture, 27.2 % was arable, .8% were permanent crops, 16.1% were permanent pasture, 22.4% were forest, and 33.5% were other (Central Intelligence Agency, 2017). The most popular natural resources are construction materials, silica sand, carbonates, and arable land (Central Intelligence Agency, 2017).

Over the next two years, economic growth is projected to only rise slightly. Private consumption is predicted to be held back due to slow real wage growth, but a lower taxation of labor will support employment. Inflation rates of consumer prices have risen a percentage point

from .6% in 2015 to 1.6% in 2016 (Central Intelligence Agency, 2017). Although favorable financial conditions can be seen, investment does not show any detrimental or favorable conditions. The housing market has become worse in recent years resulting in higher prices and more household mortgage debt.

Since the financial crisis that resulted in the restructuring of Dexia and Fortis banks, the banking sector has become smaller. However, it has recovered its resilience, and the number of nonperforming loans remains low. Measures and improvements in bank balance sheets have lessened the risks that are associated with the real economy. Interest rates have been lowered in an attempt to increase Belgium's low growth rate. Public investment is declining to the point where the stock of public capital can be estimated to decline.

Ongoing plans to improve infrastructure are in the works but more investments are needed as well as potentially shifting taxes to even further strengthen employment. The government taxes income, goods, and services. Taxes and social security contributions provide the majority of the national revenue. Regional and local governments also have authority to tax.

Regulatory Efficiency

The overall regulatory environment is efficient and transparent. With the cost of establishing a company reduced, starting a business takes less than five days and procedures. Employment regulations have gradually become less burdensome, but the non-salary cost of hiring a worker remains high. The center-right federal government has focused on improving public finances (for example, by cutting subsidies on diesel fuel in 2016).

Employment and Wealth Distribution

According to data from 2013, there are more people employed in the service industry (80.1%) than in agricultural (1.3%) and other industries (18.6%) combined (Central Intelligence Agency, 2017). *Appendix A* categorizes the labor force from 2005 to 2014; *Appendix B* breaks down civilian employment and employees by activity from 2008 to 2014. An overwhelming amount of the labor force is employed in private and public services as the expanding needs of international business, government, and tourism was realized in the second half of the 20th century.

Unemployment has dropped by .1% from 2015 to 2016 making the most dated rate 8.4%; it ranks at 97th in the world as the highest unemployment rate (Central Intelligence Agency, 2017). *Appendix C* elaborates on unemployment rate based on age and gender. In 2013, 15.1% were living below the poverty line. As recorded in 2006, the lowest 10% own 3.4% of the wealth, and the highest 10% control 28.4% of the wealth (Central Intelligence Agency, 2017).

Trade

Trade is extremely important to Belgium's economy; the value of exports and imports taken together equals 167% of GDP. Belgium's top three export partners are, respectively, Germany, France, and the Netherlands; its top three import partners are, respectively, the Netherlands, Germany, and France (Europa, 2017). Among the top imports (2013 data) are raw materials (including petroleum), motor vehicles, chemicals, textiles, and food products; among the top exports are motor vehicles, chemical and pharmaceutical products, machinery, plastics, diamonds, food and livestock, textile products, and iron and steel (Britannica, 2017). The average applied tariff rate is 1.5%, and there are relatively few barriers to trade and investment.

Organization for Economic Cooperation and Development (OECD)

Belgium is a member of the OECD. The main goals of this organization include fostering economic development and cooperation, fighting poverty, and always considering the environmental impact of growth and social development. This organization deals with many issues, of some of the most important are raising the standard of living, expansion of world trade, and promotion of economic stability. In comparison to other OECD countries, Belgium is lower than most in productivity growth.

Benelux Union

The union consists of three member countries: Belgium, the Netherland, and Luxembourg. The goal was to ensure free circulation of persons, goods, capital, and services by integrating economic, financial, and social policies. The Benelux Union became the first completely free international labor market. Border controls were abolished in 1970 (The Editors of Encyclopaedia Britannica, 2010). Though all members are also part of the European

Union, the Benelux Union served as a successful example of economic integration for the European Economic Community (now known as the European Union).

European Union (EU)

Belgium has been part of the European Union since January 1958; Belgium joined the Eurozone in January of 1999. Along with Germany, France, Italy, Luxembourg, and the Netherlands, Belgium was one of the founding countries of the European Union. Belgium is also part of the Schengen Area, which means the free movements of persons is a fundamental right guaranteed to its citizens. This entitles each and every citizen the ability to travel, work, and live in any European country part of the Schengen Area without special formalities. Citizens are able to cross international borders without being subject to border checks. Non-nationals also only need one approval to travel to countries part of the Schengen Area.

Transportation and Telecommunications

An elaborate system of main roads works extensively with modern expressways connecting all of Belgium together. The railway network is one of the densest in the world (Britannica, 2017). The railway system branches out from Brussels with the heaviest traffic being noted in Brussels and Antwerp. Antwerp also had a port that handles a large portion of foreign trade. Other important ports are in Zeebrugge-Brugge, Ostend, Ghent, and Brussels. Inland waterways can be used to travel throughout the length of Belgium. The largest airport in Belgium is Brussels International Airport; there are also smaller international airports in Antwerp, Liège, Charleroi, and Ostend.

Belgium is noted to have an advanced telecommunications network with multiple companies offering traditional telephone, cellular telephone, cable, and other telecommunications services. Cellular and Internet usage patterns are similar to that of other western European countries, but Belgians typically own fewer personal computers (Britannica, 2017). In 2015, there were 114 cellular phone subscriptions per 100 inhabitants with land lines (fixed lines) only comprising 40 subscriptions per 100 inhabitants (Central Intelligence Agency, 2017). In July of 2015, statistics stated that 85% of the Belgian population were Internet users (Central Intelligence Agency, 2017). Belgium is composed of three major communities (Flemish, French, and German-speaking), which has created a community each having its own special

broadcast media. Multiple television channels exist for each community, and data from 2007 notes that an excess of 90% of households are connected to their communities broadcast media (Central Intelligence Agency, 2017).

Summary of Economic Analysis

The Belgian economy has shown slight growth for the past three years, and it is predicted that this slow growth will continue into the future. The densely populated and excessively connected Belgium landscape shows great potential for any product entering the market. The ability of inhabitants of the European Union and also travelers to freely travel within the Schengen Area increases potential customer base. The three different communities within Belgium itself will have to take specific attention to in the marketing arena as it appears they can be categorized into separate markets.

A successfully thought out and implemented market plan can lead to prosperous business operations. Mode of market entry, market audit, and cost must be greatly considered before exposing the product to the population. With the ability to establish a business taking less than 5 days, the product gaining acceptance is the first step to physically opening our doors in Belgium.

Mode of Market Entry

Political Instability and Risk

Tourism is yet to return to normal after the terrorist attack in Brussels during 2016; the projected negative effects of growth from this attack include .5% of GDP (International Trade Administration, 2016). Global Edge rates the business environment and institutional quality of Belgium as very good. It is stable and efficient, but there is some room for improvement.

The ability of Belgium to not meet its debt and definite targets during 2015 created the need for more structural reformation. The reform has been noted by the European Union, OECD, and others. Two focuses on this restructuring will be on strengthened competitiveness and energy supplies. Competitiveness is projected to increase through more work time flexibility and reductions of employer contributions. Government is concerned also with improving the economy through fiscal consolidation. Belgium's government is currently working on trying to achieve on achieving.

Tariffs and Trade Relations

The United States began a diplomatic relationship with Belgium in 1832 after independence was gained from Netherlands. They are said to be good friends and allies that work to maintain a cooperative relationship on many foreign policy issues. Belgium typically shows Americans goodwill and affection. The US is ranked as Belgium's 5th principal trade partner; Belgium ranks as the 12th largest recipient of U.S. exports (International Trade Administration, 2016). The Flemish are strongly in favor of free trade, but there is resistance in the French and German speaking areas of the south.

The average tariff on US production entering the European Union is approximately 3% unless stated otherwise in The Integrated Tariff of the Community (TARIC) (International Trade Administration, 2016). According to product code 0903000000 (Mate), Regulation R2658/87, with the country of origin as the United States, Brazil, Argentina, or Paraguay, the tariff is 0% (European Commission, 2017). (Brazil, Argentina, and Paraguay are the countries in South America where the Yerba Mate tree is native.) All countries were checked as country of origin may have different interpretations depending on the various national laws and international treaties. These may include the country of manufacture, production, or growth.

Belgium has welcomed hundreds of US firms to its country with the objective to diversify and expand trade opportunities with non-EU members. The exceptional hospitality that Belgium has given many of these companies has caused them to house their European headquarters within the country. Belgium offers annual deductions on taxable income proving to be extremely attractive to any business as it reduces the taxable base. Belgian government, however, plans to increase taxes on investment income by 3%, from 27% to 30% (Coface, 2017).

Mode of Entry Selection

With the future of Yerba Mate's presence in Europe in mind, it is suggested that establishing an office in Belgium will prove to be of most value. Though there are multiple ways of penetrating the market, an established office will be the most strategic choice. Belgium offers distinct demographic groups that reflect the overall European consumer and economy.

Belgium is a place to “get your feet wet” with the European culture and economy, in general, before further regional expansions.

The process of establishing an office in Belgium has been modernized and streamlined. It only takes an approximate six weeks to become incorporated. There is no prior government authorization required, and there is no restriction on transfer of capital to Belgium. Each business incorporated in Belgium is given a unique identification number that links all of its data together. Two different routes may be used to establish an office in Belgium: subsidiary or branch. A subsidiary is governed by foreign law, while a branch is governed by Belgian law.

Establishing a subsidiary is recommended for Yerba Mate. The subsidiary option has the advantage of being a separate legal entity with the mother company not being held responsible for its subsidiary. Another advantage of this option is that the annual reports to the Belgian authorities are less strict. From a marketing perspective, a subsidiary gives the company a more European image, which may be seen as more trustful to potential stakeholders.

This subsidiary should be established in the city said to be the heart of the European market: Brussels. This international city is at the crossroads of Anglo-Saxon, Latin, and Germanic cultures (Brussels Regional Public Service, 2017). With its mix of international cultures and extensive transportation links, it is the ideal test market. Brussels also has a solid infrastructure and excellent human capital (Brussels Regional Public Service, 2017).

Market Audit

The Product

Guayaki products are made from the holly tree (yerba mate) located in the rainforests of South America. These leaves are naturally caffeinated and used by the people of the rainforest for invigoration, focus, and nourishment. The leaves of mate naturally contain 24 vitamins and minerals, 15 amino acids, and an abundant number of antioxidants (Guayaki, 2017). A study in 1964 by the Pasteur Institute and the Paris Scientific Society concluded that this plant contained “practically all of the vitamins necessary to sustain life” and is difficult to find a plant anywhere on the planet with its vast nutritional value (Guayaki 2017). Yerba mate also contains theophylline and theobromine: ingredients found in coffee, tea, and chocolate. Yerba mate, however, is less likely to cause stomach acid and jitters as coffee does and strength does not

correlate to bitterness as tea does. It is very versatile for consumption with many possibilities of add-ins, such as honey and milk or lemon and mint, and can also be consumed hot or cold. Caffeine content ranges from 140 mg per serving (energy shot) to 40 mg per serving (traditional mate).

The simplicity with this product is that it only need to be opened (twist top bottle) to be consumed. The option of loose leaf tea will also be made available. The consumer will only need a tea ball, container to drink out of, and hot water (to steep). The ability of the versatile nature of multiple add-in items, such as lemon or mint, to the hot brewed loose leaf tea gives the consumer the ability to conform the product to his or her tastes while still realizing the health and caffeine benefits of the product.

This product has the option of distributing free samples. This can easily be done by pouring a small amount of the prepared product into a small cup or having freshly brewed loose leaf tea available. Samples can be distributed outside the office. This will give the consumer the option of purchasing the product directly after tasting the product. It is also in Guayaki brand's best interest to include a coupon in conjunction with this free sample as the market is highly competitive. As trends towards healthier consumption habits, as well as the need for more energy through caffeinated beverages, the acceptance based on its offerings should have little problem with acceptance.

The Market

According to Eupedia (2017), approximately 10% of the population is outside of the three dominant cultures. Of this approximate 10%, 1.6 million people are immigrants or children or grandchildren of immigrants (Eupedia, 2017). Next to Canada, Belgium also grants the most new citizenships per capita in the world (Eurpedia, 2017). These factors bring additional adversity to the market.

As one of the most densely populated countries in the world, it also makes sense that Belgium also is known for its vast transportation abilities. Belgium has constructed the highest density of roads and railroads in the world. The country has the third highest amount of vehicles per square kilometer after Netherlands and Japan (Eupedia, 2017). Although the extensive train system is availability to almost everyone, the majority still prefer to drive. Only

10% regularly utilize the public transportation system. According to Eupedia (2017), the coast tram operates between the French border to the Dutch border is the longest tramway line in the world. The vast transportation system should make it fairly simple to transport our product to different areas throughout the country as well as adjacent countries.

Advertising and Promotion

Belgians are considered the highest percentage of cable TV viewers with 97% of households receiving television services (Eupedia, 2017). Television is an important information and leisure tool. Belgium is considered the most cabled country in the world, which also makes the Internet easily accessible to its citizens. There are over 8.075 million radios in the country, but listening has increased as Internet radio has been made available (Advameg Inc, 2017). Advertisers have increased their marketing efforts in radio advertising since 2009. In 2009, approximately 475 million (US dollars) were spent on radio advertising; it was projected that the number would reach 767 million in 2016 (Statistica, n.d.).

With Belgian people being avid discount coupon users, the marketing availability is very promising. Purchasing display locations on trains, billboards along the roads, and coupon distributing along with free samples should provide a firm footing in their energy drink markets. Television and radio are becoming fragmented and are seen with declined users as Internet versions become available and widely accepted. Newspaper readership is also declining. These avenues will still prove to be worthwhile investments. However, it is recommended that a smaller portion of the advertising budget be directed to these avenues. Advertisers in Belgium tend to favor below the line direct marketing. Internet advertising and an exceptional online presence in Belgium through websites and social media outlets are extremely promising. According to Statistica (n.d.), the top three social media websites in Belgium in 2016, in a survey conducted by Cint, are Facebook, Youtube, and Google+. Facebook leads the social media users with 35.47% with Youtube coming in second at 14.55% (Statistica, n.d.).

The difficult task will be deciding when to use traditional media outlets, such as television, radio, and print outlet, in regards to the divide between linguistic lines. It is important that these lines be retained within the dominant cultures. An ad in the Flemish community may be required to be altered for the French community as well as the German-

speaking community. The Flemish and French communities encompass a larger majority than the German-speaking community does. The media outlets, promotion, and advertisements must be considered through all dominant culture areas.

Consumer Buying Habits

With the linguistic and regional divisions, based on distinct cultures throughout the country, it's important to define the consumer characteristics for each group. In general, the Belgian consumer is price sensitive and focused on getting the best value for price. Even though, as a whole, purchasing power has fallen by about 20% over the past 20 years, Belgium still boasts one of the highest per capita incomes in Europe (Banco Santander, 2017). Data from 2011 shows food and non-alcoholic beverages being the second highest category for consumption expenditure; on average, 13.2% was spent in this category (Banco Santander, 2017). As a whole, energy drink sales grew in Belgium during 2016. They appeal more to teenagers and young professionals than any other consumer group. The government has increased tax on soft drinks, thus increasing unit price and increasing the popularity of smaller containers.

Pricing Strategies

Competitive pricing is key in the Belgian market. Although Belgians do view American products in an exceptional light, it does not mean they are willing to pay more for them just because it reads, "Made in the USA." Looking at one popular brand, Red Bull (250 ml can), the average price in Belgium is \$1.12 (US) with a worldly average of \$1.62 (GlobalBrandPrices.com, 2016). This shows how competitive pricing has extremely driven down the average price of products in the Belgian Market.

It is important to distribute free samples and coupons when the product is initially sold in the market. This will give consumers easy trialability and an initial discount product price. Coupons, as well as other discount pricing options, will also be available, but not in the abundance as initial market entry. A promotion that should prove to increase sales is the "Buy 10 Get 1 Free" punch cards. Other discount promotions include Facebook giveaways, other types of social media promotions, as well as in store promotions. Store promotes can be advertised around certain distinct holidays in relation to any of the three dominant cultures as

well as general holidays and/or observances. It's important to always stay on top of the competition in regards to pricing strategies as the market is fueled by competitive pricing.

Market Audit Summary

The health and caffeinated qualities that Yerba Mate products offer the consumers align perfectly with current Belgian trends. The popularity of energy drinks is emerging as well as healthy alternatives to sodas. Yerba Mate would be the first in the market to boast both caffeinated qualities and increased health benefits. Guayaki Yerba Mate products are fair trade certified, certified organic, kosher, non-GMO, and rainforest grown. The Guayaki Company is a member of the Fair Trade Organization, member of the American Herbal Product Association, and a B Corporation. These impressive qualities and certifications will show the consumers the authenticity of the brand and its products.

The location and size of the market, in the heart of the European Union, gives access to a small sample of the whole European Union. As the product expands, Belgium will prove to be an excellent location for the main headquarters. The transportation proves to excel at getting products throughout the country as well as to neighboring countries.

A competitive pricing strategy will need to be enforced and Belgians are extremely price conscientious. The most effective advertising/promotions will come through social media/Internet and below the line direct advertising. The most difficult aspect of the market will be adhering to the three dominant cultures.




Competitive Analysis

The Competition

Flavors of energy drinks have become a main focus within the industry. Consumers in Belgium are drawn to these type of drinks that look healthier and offer smaller servings; slim 25cl cans have been extremely successful in the market. The soft drink industry, however, is on a decline as the Belgian consumer is becoming more and more aware of the adverse health effects of these sugary drinks. They are starting to trend towards more natural products as sugar and additives are becoming of increasing health concern. Soft drink manufacturers have been focusing on reducing calorie and sugar content of drinks as well as the amount of

additives. Another important aspect that manufactures are looking at are to offer more natural products.

The top 10 energy drinks in Belgium are Nalu Exotic (10), Mixed Up (9), Monster Energy (8), Monster Energy The Doctor (7), Monster Energy Zero Ultra (6), Monster Energy Ultra Red (5), Monster Energy Assault (4), Red Bull (3), Golden Power (2), and Bullit (1) (pascal en tiffany Tettero, 2016). Monster has many popular energy drinks within the market, but the top three competitors in this category are Red Bull, Golden Power, and Bullit.

		
<p>Supermarkets: 18 different distributors/partners are listed as places that Bullit can be purchased</p>	<p>Aldi</p>	<p>Appears to be readily available at supermarkets as well as some availability at eating establishments and bars</p>
<p>Carbonated water, sucrose, glucose, nutritional acid, taurine, acid regulator, glucuronolactone, caffeine, inositol, vitamins (nicotinamide, pantotheenzuur, b6, b12), aroma's and dyes (caramel, riboflavin).</p>	<p>Water, sugar, glucose syrup, fructose, acidifying citric acid (E330), acidity corrector sodium citrates (E331), taurine, carbon dioxide, glucuronolactone, aroma, caffeine, Inositol, Colorants: Caramel (E150c), Riboflavine (E101), Vitamines B3, B5, B6, B12.</p>	<p>Sparkling water, sucrose, glucose, acidity correctors (Sodium citrate, magnesium carbonate), citric acid, taurine, caffeine, glucuronolactone, inositol, vitamins (niacine, pantothenic acid, B6, B12), aromas, colorants (caramel, riboflavine)</p>
<p>250 mL: regular and sugar free 568 mL: regular and orange</p>	<p>250 mL: regular, zero (no sugar), Black or Gold (added vitamins)</p>	<p>250 mL: regular, sugar free, simply cola, Red edition (cranberry), Blue edition (blueberry), Green edition (kiwi-apple), Orange edition (mandarin), Yellow edition (tropical)</p>
		<p>\$1.12</p>

Facebook, Twitter, YouTube	Instagram	Instagram, Facebook, Twitter, YouTube
<p>Makes you sharper, more alert, and gives you more energy. Increases your stamina, speeds up metabolism, and increases concentration and reaction speed.</p> <p>An energy drink you are accustomed to.</p> <p>Widely available and suitable for any time.</p>		<p>100% Recyclable</p> <p>Worldwide appreciated by athletes, students, and professionals where you have to perform but also for long car rides.</p> <p>A function drink. It's specifically developed for times when you want to achieve more. Red Bull gives you wings (energy) when you need it.</p> <p>Drink it on the road, during study, at work, when you are exercising, when you are gaming, or to enjoy the nightlife.</p> <p>High quality ingredients.</p> <p>Hosts events within Belgium such as a music festival, grand prix, soap box races, futsal, and other types of extreme sporting events.</p>

Government Regulations and Intellectual Property Rights

There is no specific product legislation at the European level, but certain laws do pertain to the labelling of different foodstuffs. The *Food Information to Consumers Regulation (EU) No 1169/2011* states that the labelling of energy drinks include, "High caffeine content. Not recommended for children or pregnant or breast feeding women." This must be followed, in brackets, by the amount of caffeine per 100 ml. It is only required for drinks that contain a caffeine amount greater than 150 mg per liter (mg/l). The *Code of Practice for the Marketing and Labelling of Energy Drinks* dictates certain commitments in regards to the marketing and labeling of energy drinks. This includes not marketing to children. Health and nutrition claims are regulated in the *Health Claims Regulation (EC) No 1924/2006*. There have also been established provisions for the addition of vitamins and minerals and of other substances to foods noted in the *Addition of Nutrients Regulation (EC) No 1925/2006*. It is applicable to

energy drinks if related claims are used on labels, in an advertising context, or contain added substances that fall within the scope of the legislation. All EU member states implement the above noted provisions to energy drinks, however, member states are also able to implement their own rules and regulations. Energy drink rules do not apply to drinks based on coffee or tea and coffee or tea extract in which the name of the food includes the term 'coffee' or 'tea.' The health-tax, specifically in Belgium, was placed on soft drinks to discourage consumption increases taxes of one cent per can. This tax was intended to decrease intake of unhealthy beverage consumption. Import and classification of the product is highly important.

It will be important to protect the Guayaki brand name and other related intellectual property rights by trademarking and patenting. Although these rights are already protected in the US, the right will not transfer to Belgium. This will have to be done immediately as the trademark and patent procedure in Belgium is based on a first-to-file basis. Experts, such as local attorneys or intellectual property consultants, are available for hire on Belgian law and intellectual property rights. The US Commercial Service also has a list of local lawyers which can be provided upon request. It is noted that it is of high importance that small and medium sized businesses work with trade associations and organizations to help protect intellectual property and stop counterfeiting (The International Trade Administration, 2016).

Competitive Analysis Summary

This target market is quite large and culturally receptive to new products that are advertised well. Yerba Mate would be a readily embraced product with teenagers and young professionals due to the caffeinated benefits along with the natural ingredients that make Yerba Mate a healthy alternative to sugary-caffeinated drinks. Competing against the biggest names in Belgium energy drinks, the Guayaki brand Yerba Mate products would be the healthier alternative that will stand out with all natural ingredients from the rainforests of South America.

With the adversity of rules and regulations, it is in the best interest of the company that an expert be consulted to determine the best classification, as it pertains to specific legalities, to import and sell the Guayaki brand Yerba Mate products. It will also be of increased value to

protect intellectual property rights before infiltrating the market. An expert can also be hired to work with protecting Intellectual property rights.

The distribution of the Yerba Mate products would be accomplished easily by distributing free samples. At sampling events, market research can be done on flavor. The key to this market is competitive pricing as well as the trend towards healthy alternatives.

Preliminary Marketing Plan

Objectives

The initial marketing objective of Guayaki brand Yerba Mate is to penetrate the Belgium market. By using Belgium as the primary launching point, Guayaki brand will eventually be able to successfully enter the entire European market. Yerba Mate is a healthy alternative to the other energy drinks on the market. The European consumer will have the opportunity to experience how an energy drink should make you feel with products made from yerba mate. Additionally, Guayaki drinkers have become a driving force for conservation and community development within the Brazilian Rain Forest. Consumers can feel good about supporting a company that helps the environment and provides a high quality product at a reasonable price.

Target Market

The product will be marketed to consumers aged 12 and above that want a healthy life fueled by energy that is enriched with vitamins and flavor. These customers want a suitable alternative to the high calorie, sugary, and costly energy drinks and soda. Our initial focus within the Belgium culture will primarily be young professionals and teens. An additional demographic that to target is the health conscious people that want to have a healthy alternative to sugar-laden energy drinks.

SWOT Analysis

Overcome weaknesses to pursue opportunities

<i>Pursue opportunities that fit with strengths</i>	<p><u>Strengths</u></p> <ul style="list-style-type: none"> • Strong Market • Test Market • Health Trends • US Friendly Government • Organic, Fair-Trade, and Sustainable Product 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Vulnerable to changes in the general economy • Cost of setting up an office • Mixed Cultural Market • Young market • Language Issues 	<i>Establish a defensive plan to minimize threats</i>
	<p><u>Opportunities</u></p> <ul style="list-style-type: none"> • Demand for Healthier choices • Differential advantage • Growing European Market • Strong Youth Market • Additional Flavors • Yerba Mate Café 	<p><u>Threats</u></p> <ul style="list-style-type: none"> • Changes in social dynamics • New entrance in market • Existing competition • Energy drink Concerns • Changes in Government Regulations 	

Minimize vulnerability to threats using strengths

Strengths

There is market for energy drinks in the European market. There is also a demand for a “healthier” alternative to soft drink products. Entering Belgium will be a great way to begin penetration of the entire European market. The use of Belgium as a test market will allow for the correction of any problems that are encountered within Belgium to avoid any fallout within the entirety of the European market. A growing number of consumers in Belgium are seeking

healthy alternatives. The Guayaki brand Yerba Mate products are organic, fair trade, kosher, gluten free, GMO-free, and sustainable. The organic energy shot satisfies the need for caffeine without the “nasty stuff” contained in sodas. Guayaki brand Yerba Mate products have “the strength of coffee, the health benefits of tea, and the euphoria of chocolate.”

Weaknesses

The energy drink market, like most markets, are vulnerable to changes in the general economy. Another weakness is that the energy drink market is a very young market. The Belgian market is a mixing pot and as such, Guayaki brand will have to spread itself quite thin in order to increase the probability of being successful in the market. There is also the issue of language differences within the Belgium culture that will need to be carefully addressed.

Opportunities

The European market is growing and is more valuable than Brazil, India, & China combined as stated by the United States government. According to U.S. Commercial Service (2016), “Europe is a market of over 500 million consumers across 28 countries, all eager for American products and services. In fact, in 2013 U.S. companies exported more than 730 million USD worth of goods each day to the EU...” There is also a growing demand for a healthy alternative to the soft drink market; there is also a strong demand for energy drinks within the youth market. The Guayaki products also have a differential advantage and that should be used to promote the product and develop consumer loyalty. The flexibility of the product will allow it to be adapted to local tastes. Once established within the European market, it would be within the company’s best interest to develop its own storefronts and cafés, such as the one currently located in California.

Threats

The company is most threatened by changes in the social dynamics of the culture. Another threat to this product is other competition currently within the market and other new entrants. There has also been some political regulations related to energy drinks and concern within the medical community regarding the use of energy drinks among young children. Education will be key in addressing these threats.

Product Adaption

Labeling will be the primary product adaptation. There are three predominate languages in Belgium; the challenge will be reaching all three languages at the same time. This will require logistic support, which will be facilitated through our main office in Brussels. Local businesses can be used to sell products.

The products are very versatile for consumption, and there is a vast array of add-ins that can be used to adapt the product to the individual tastes of the consumer. Market research will be conducted to adapt Guayaki brand Yerba Mate products to any differences local tastes.

Promotional Mix

Massive amounts of initial marketing will be used to develop name recognition and to raise awareness of the product. Advertising will take place through traditional means such as television, radio, newspaper, and billboards. Extreme care needs to be taken with the language used throughout the advertising campaign as sensitivity to the language differences within the unique cultures of Belgium is of great significance.

The distribution of free samples and coupons through these channels and at the retail locations will give consumers an opportunity to try this new product with minimal risk. This is important in the Belgium market because consumers are very price sensitive.

Twitter, Facebook, and Instagram are social media platforms that are growing with increasing popularity among the people of Belgium (Passport to Trade 2.0, 2014). A number of different tactics can be employed to expand reach and boost growth. Dally posts on Twitter and Instagram, sharing product experiences within Belgium and the amazing qualities of Guayaki brand Yerba Mate products, will prove to be invaluable to social media advertising. Weekly posts on Facebook will include public relations based stories about employees (both local and foreign), customers, and the Guayaki Company. The main objective is to establish a record of growth and involvement within the Belgian communities. The best way to have a resounding impact on the communities is to dig in and provide value from initial market entrance.

Europeans value face to face communication, respect the old fashioned, and as a society that stretches back for a millennia, respecting the past is crucial if any "invading" company wants to succeed.

Engaging in guerilla marketing tactics will excite the market to want the product. There are many tactics that can be used to elicit the desired want within the target market. Of the most interactive tactics includes vending machine purchases linked to the mobile app reward system. A series of vending machines will offer the amazing yerba mate products; these vending machines will have the capabilities of linking to the downloadable app, which will give the consumer a specific amount of rewards points if he or she has installed the app. Rewards points will be earned by purchasing products through the app, sharing social media posts, entering raffles, downloading the apps, and multiple other means related to app and social media use. Once so many rewards points are earned, app users can redeem for free products. Product value based on number of reward points received.

Distribution

If the venture proves successful in the Belgian market, the subsidiary in Brussels will be the epicenter of all operations in Belgium and Europe. It will be manned by a full complement of staff from the main branch in Sebastopol, California, and from within Belgium. Employing the local populace is a way to build relationships and have a more natural penetration of the market.

High tech vending machines will be deployed as part of the guerilla tactics. This will set Guayaki products apart from the competition and create a firestorm of excitement them. To successfully deploy vending machines, secure store space (which is many times easier than securing shelf space), work with town/city governments to permit the vending machines, and use "pop up" vending, which means have them available at a designated location for a few hours at a time.

Working with local retailers, such as Carrefour, Delhaize, SPAR, and Colruyt, to secure shelf space in convenience stores and supermarkets will showcase the Guayaki products next to similar products. This is one traditional way to bring product awareness to customers. The initial focus will be in the heart of Belgium and then branch out from this central location. As brand awareness, product consumption, and profits increase, a number of stores/cafés devoted to Guayaki brand Yerba Mate products will be created. This will only prove to be effective if the majority of the Belgian market is accepting of the products.

Price Determination

Guayaki Yerba Mate will be using competitive pricing methods. Coupons, promotions, and discounts will be used to promote the product. Free samples can be distributed outside the office and at store locations; using this in conjunction with coupons will allow consumers to try the product with little risk. It is important to ensure that any promotional effort be used to increase sales.

Resource Requirements

Guayaki Yerba Mate will need to ensure that they have the available finances to enter the Belgium Market. The largest initial expense will be in establishing an office in Brussels. Even with the streamlined and modernized process of establishing an office, a location will need to be secured and local staff will need to be hired.

Advertising expenses will also be initially high as Yerba Mate will be using massive amounts of television, billboards, radio, and newspaper advertising to develop name recognition and product awareness. Social Media will also be used for promotion, but only real cost associated with social media is a hired person to keep accounts updated.

Distribution expenses will also effect the bottom line. Growing and production will continue at all current locations. The product will need to be imported to Belgium and then distributed throughout the region. The massive transportation system in Belgium will be an asset in this regard. The future possibility of importing the ingredients from South America and producing the final product in Europe will be considered after Guayaki brand Yerba Mate has been established within the European market.

Appendices

Appendix A: Labor Force Statistics (Data from OECD)

Annual average estimates

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Total labour force, thousands										
All persons										
Males										
Females										
Armed forces, thousands										
All persons										
Males										
Females										
Civilian labour force, thousands										
All persons	4 626	4 647	4 733	4 780	4 800	4 895	4 858	4 893	4 947	4 967
Males	2 583	2 583	2 618	2 631	2 833	2 876	2 850	2 870	2 882	2 877
Females	2 043	2 065	2 115	2 148	2 167	2 220	2 208	2 223	2 265	2 290
Unemployed, thousands										
All persons	390	383	353	324	380	408	347	369	417	423
Males	198	191	174	170	204	217	188	204	232	242
Females	194	192	179	163	176	189	158	165	185	182
Civilian employment, thousands										
All persons	4 235	4 264	4 380	4 456	4 421	4 489	4 509	4 524	4 530	4 544
Males	2 387	2 392	2 444	2 461	2 429	2 458	2 462	2 488	2 451	2 435
Females	1 849	1 872	1 937	1 995	1 991	2 031	2 047	2 058	2 080	2 108
Civilian employment (%)										
All persons	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Males	56.4	56.1	55.8	55.3	55.0	54.8	54.6	54.6	54.1	53.8
Females	43.6	43.9	44.2	44.7	45.0	45.2	45.4	45.6	45.9	46.4
Unemployment rate (% of civilian labour force)										
All persons	8.4	8.2	7.5	7.0	7.9	8.3	7.1	7.5	8.4	8.5
Males	7.6	7.4	6.7	6.5	7.7	8.1	7.1	7.7	8.0	9.0
Females	9.5	9.3	8.4	7.6	8.1	8.6	7.2	7.4	8.2	7.9
Total labour force (% of population)										
All persons										
Males										
Females										
Total labour force (% of population aged 15-64)										
All persons										
Males										
Females										
Civilian employment (% of population)										
All persons	40.4	40.4	41.2	41.5	40.9	41.1	40.8	40.7	40.5	40.5
Males	46.8	46.3	47.0	46.9	46.0	45.9	45.4	45.1	44.6	44.1
Females	34.5	34.8	35.7	36.3	36.2	36.5	36.4	36.4	36.6	36.0
Civilian employment (% of population aged 15-64)										
All persons	61.8	61.4	62.5	62.8	62.0	62.4	62.1	62.0	62.0	62.2
Males	69.0	68.5	69.3	69.2	67.8	67.9	67.3	67.1	66.6	66.2
Females	54.1	54.3	55.6	56.4	56.2	56.8	56.7	56.8	57.4	58.1
CIVIL. EMPLO. - PROFESSIONAL STATUS, thousands										
All activities	4 235	4 264	4 380	4 456	4 421	4 489	4 509	4 524	4 530	4 544
Employees	3 600	3 621	3 731	3 813	3 786	3 844	3 894	3 875	3 847	3 880
Employers and persons working on own account	573	577	593	579	593	601	595	611	642	664
Unpaid family workers	72	66	57	54	55	44	50	38	41	41
Agriculture, hunting, forestry and fishing	88	82	81	80	79	61	69	59	82	55
Employees	21	20	22	24	28	14	16	16	13	13
Employers and persons working on own account	50	50	47	44	42	37	36	32	40	35
Unpaid family workers	16	14	12	12	9	9	8	8	9	8
Non-agricultural activities	4 149	4 181	4 289	4 388	4 342	4 428	4 451	4 471	4 469	4 489
Employees	3 569	3 601	3 709	3 789	3 739	3 830	3 850	3 860	3 834	3 867
Employers and persons working on own account	523	527	546	535	557	564	560	579	602	629
Unpaid family workers	57	52	45	41	48	35	42	32	32	34
Employees as % of civilian employment	84.8	84.9	85.2	85.6	85.2	85.6	85.7	85.7	84.8	85.4
Part-time employment (%)										
Part-time as % of employment	18.6	18.7	18.1	18.3	18.2	18.3	18.8	18.7	18.2	18.1
Male share of part-time employment	20.0	18.7	19.3	18.7	19.4	19.8	20.1	20.2	19.2	20.9
Female share of part-time employment	80.0	81.8	80.7	81.3	80.6	80.4	79.9	79.8	80.8	79.1
Male part-time as % of male employment	8.7	6.2	6.4	8.3	6.8	6.7	7.0	7.1	8.6	7.2
Female part-time as % of female employment	33.1	33.8	32.2	32.5	31.8	31.7	32.4	32.1	31.4	30.5
Duration of unemployment (% of total unemployment)										
Less than one month	8.8	6.2	6.0	7.2	7.2	5.4	4.5	4.7	3.4	3.6
More than 1 month and less than 3 months	14.8	14.7	16.0	17.3	16.8	15.8	16.4	17.9	17.4	15.0
More than 3 months and less than 6 months	11.8	13.9	12.9	14.1	16.8	13.0	15.0	16.5	15.1	15.2
More than 6 months and less than 1 year	15.1	14.0	14.7	13.8	16.0	17.3	15.8	16.2	17.9	16.2
More than 1 year	51.7	51.2	50.4	47.6	44.2	48.8	48.3	44.7	46.0	49.9

Note: Detailed metadata: <http://metadata.oecd.org/alfsummb/20160212/073e6>

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Appendix B: Civilian Employment and Employees by Activity (Data from OECD)

Annual average estimates

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	
CIVILIAN EMPLOYMENT											
By activity, thousands											
A-U	All activities	..	..	..	4 445.9	4 420.7	4 488.7	4 509.8	4 521.9	4 536.3	4 543.8
A	Agriculture, hunting and forestry	..	..	..	59.0	65.7	60.7	58.8	53.0	61.6	55.3
B-F	Industry	..	..	..	1 098.9	1 037.7	1 049.2	1 047.7	984.1	983.2	972.0
B	Mining and quarrying	..	..	..	5.3	6.7	4.5	4.9	7.1	4.8	5.2
C	Manufacturing	..	..	..	710.3	658.1	652.9	641.4	584.9	588.9	581.5
D	Electricity, gas, steam, air cond. supply	..	..	..	32.4	29.4	30.8	29.2	28.4	27.2	24.7
E	Water supply, sewerage, waste mgnt, remediation	..	..	..	26.7	30.3	38.3	34.8	30.9	32.7	35.6
F	Construction	..	..	..	322.3	319.3	322.7	357.5	324.9	329.6	326.1
G-U	Services	..	..	..	3 274.0	3 317.3	3 378.8	3 403.0	3 486.8	3 486.5	3 516.2
G	Wholesale, retail trade, vehicle, motorcycle repair	..	..	..	567.8	571.6	589.5	588.4	607.0	629.8	604.8
H	Transportation and storage	..	..	..	283.1	286.8	268.9	272.2	254.8	241.8	244.5
I	Accommodation and food service activities	..	..	..	149.0	142.7	143.0	149.5	154.0	145.3	154.5
J	Information and communication	..	..	..	129.7	140.4	152.8	138.0	150.4	141.4	144.1
K	Financial and insurance activities	..	..	..	175.9	157.6	158.0	181.0	157.0	168.2	153.4
L	Real estate activities	..	..	..	23.0	20.6	22.5	23.8	26.1	29.6	25.9
M	Professional, scientific and technical activities	..	..	..	198.8	208.3	197.2	210.5	212.3	222.7	232.7
N	Administrative and support service activities	..	..	..	168.5	177.5	174.9	187.3	233.9	257.7	264.7
U	Public administration, defence, social security	..	..	..	429.6	418.7	407.9	401.4	408.1	383.1	380.0
P	Education	..	..	..	378.0	393.3	414.2	412.9	411.0	399.8	432.3
Q	Human health and social work activities	..	..	..	587.3	600.2	604.2	614.1	657.0	634.0	662.9
R	Arts, entertainment and recreation	..	..	..	61.5	59.9	64.8	70.5	65.5	73.1	65.3
S	Other service activities	..	..	..	92.3	92.5	98.8	97.8	95.3	105.8	99.2
T	Households as employers and own-use activities	..	..	..	29.5	34.5	38.1	37.3	17.0	22.6	6.7
U	Activities of extraterritorial organizations, bodies	..	..	..	31.0	42.6	42.1	38.2	38.5	42.0	42.4
EMPLOYEES											
By activity, thousands											
A-U	All activities	..	..	..	3 813.6	3 766.5	3 844.1	3 864.4	3 874.9	3 847.2	3 874.8
A	Agriculture, hunting and forestry	..	..	..	17.4	19.2	14.3	14.6	14.9	12.8	12.9
B-F	Industry	..	..	..	873.8	807.8	820.0	812.8	857.4	846.4	847.2
B	Mining and quarrying	..	..	..	5.1	5.7	4.4	4.8	6.4	4.7	5.0
C	Manufacturing	..	..	..	668.2	612.9	612.4	602.1	556.8	552.5	544.0
D	Electricity, gas, steam, air cond. supply	..	..	..	31.7	28.6	30.3	28.4	28.0	28.1	24.4
E	Water supply, sewerage, waste mgnt, remediation	..	..	..	26.0	29.0	37.4	34.2	29.4	32.1	34.1
F	Construction	..	..	..	242.8	231.3	235.4	243.1	238.7	232.9	239.7
G-U	Services	..	..	..	2 872.2	2 839.8	2 900.7	2 937.2	3 002.5	2 986.0	3 018.5
G	Wholesale, retail trade, vehicle, motorcycle repair	..	..	..	431.0	433.7	462.7	457.0	488.7	494.8	484.7
H	Transportation and storage	..	..	..	268.1	247.7	254.1	259.0	238.4	227.1	234.5
I	Accommodation and food service activities	..	..	..	97.7	91.8	89.9	100.3	87.8	88.0	104.1
J	Information and communication	..	..	..	110.4	120.4	129.8	115.2	128.8	114.9	118.7
K	Financial and insurance activities	..	..	..	156.9	141.8	140.3	141.5	140.5	141.0	136.7
L	Real estate activities	..	..	..	15.0	13.7	14.6	16.8	10.8	19.6	18.9
M	Professional, scientific and technical activities	..	..	..	124.3	128.4	123.6	133.8	129.5	135.6	137.8
N	Administrative and support service activities	..	..	..	151.5	158.0	152.0	187.6	211.8	236.1	236.5
U	Public administration, defence, social security	..	..	..	422.8	417.1	405.0	398.5	402.9	380.1	377.0
P	Education	..	..	..	372.8	389.7	408.8	409.1	405.6	382.1	425.2
Q	Human health and social work activities	..	..	..	497.0	515.1	531.6	543.1	575.7	557.1	573.3
R	Arts, entertainment and recreation	..	..	..	49.4	48.8	52.3	60.0	53.4	60.9	53.1
S	Other service activities	..	..	..	81.0	67.8	65.7	64.9	64.6	70.7	64.3
T	Households as employers and own-use activities	..	..	..	28.5	33.7	37.8	37.0	15.8	19.9	9.1
U	Activities of extraterritorial organizations, bodies	..	..	..	30.5	42.5	41.7	37.6	38.0	41.1	42.2

Note: Detailed metadata: <http://metalinks.oecd.org/alfsumtab/20160212/cdf35>
Disclaimer: <http://oe.cd/disclaimer>

Appendix C: Participation Rates and Unemployment Rates by Age and Sex (Data from OECD)

Annual average estimates, percentage

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Participation rates										
Males										
15-19	11.9	11.6	10.9	12.0	10.9	10.5	10.3	10.5	8.6	8.3
20-24	63.1	63.7	62.2	60.7	59.2	58.5	58.8	57.7	58.6	54.1
25-34	93.6	93.2	93.6	93.7	92.9	92.8	91.3	91.0	91.2	91.3
35-44	94.2	94.0	94.4	94.2	93.5	93.7	92.6	92.7	92.7	92.4
45-54	88.5	88.4	89.6	89.0	89.1	90.1	89.3	88.7	88.8	88.6
55-59	57.6	58.3	61.7	62.8	62.5	66.2	68.7	68.8	69.5	70.2
60-64	24.0	22.6	23.8	23.5	25.7	27.2	27.1	26.8	29.0	29.7
15-24	37.6	37.4	36.1	38.0	34.3	35.2	34.1	35.0	33.7	32.3
25-54	92.2	91.9	92.5	92.3	91.3	92.2	90.7	90.7	90.9	90.7
55-64	19.4	12.7	14.4	14.4	15.2	17.0	17.8	17.0	20.5	21.3
65 and over	3.4	2.7	3.0	2.9	3.1	3.2	3.4	4.0	3.6	3.8
15-64	73.0	73.4	73.6	73.3	72.5	73.4	72.3	72.5	72.7	72.4
Females										
15-19	7.7	7.3	8.0	7.2	7.9	7.5	8.8	8.4	8.1	6.6
20-24	58.1	56.2	55.1	54.3	51.5	51.0	49.2	47.3	48.0	47.2
25-34	83.3	84.1	83.2	84.7	84.2	84.0	81.4	82.2	81.2	82.6
35-44	80.0	80.3	81.2	82.1	81.9	81.0	81.7	81.4	82.8	82.9
45-54	67.5	67.2	70.2	70.9	72.3	73.8	73.6	74.3	75.6	76.6
55-59	33.8	36.2	40.8	42.4	43.8	45.7	48.7	51.0	55.1	56.2
60-64	9.8	10.3	12.1	11.8	13.8	15.0	16.0	17.2	18.7	19.6
15-24	32.3	31.9	31.6	30.8	29.9	29.9	29.8	27.9	28.2	28.1
25-54	76.6	77.0	78.0	79.0	79.2	80.4	78.7	79.1	79.7	80.6
55-64	23.4	24.8	27.5	27.9	29.3	30.9	33.0	34.0	37.6	39.0
65 and over	1.0	1.0	0.9	1.0	0.7	1.2	1.1	1.1	1.4	1.2
15-64	59.5	59.5	60.4	60.8	60.9	61.8	61.1	61.3	62.3	63.0
All persons										
15-24	35.0	34.7	33.9	33.4	32.4	32.5	32.0	31.5	31.0	30.2
25-54	84.6	84.5	85.3	85.7	85.6	86.3	84.7	85.0	85.3	85.8
55-64	33.3	33.6	35.9	36.1	37.2	39.2	40.3	41.4	44.1	45.1
65 and over	2.0	1.7	1.8	1.8	1.7	2.1	2.0	2.3	2.8	2.3
15-64	66.7	66.6	67.1	67.1	66.9	67.7	66.7	66.9	67.5	67.7
Unemployment rates										
Males										
15-19	28.9	28.4	27.5	24.4	28.6	34.1	30.1	31.8	38.3	31.5
20-24	19.5	17.4	15.2	15.9	20.5	20.4	16.8	18.5	22.8	22.9
25-34	9.1	8.2	8.3	7.4	8.4	8.7	8.8	9.8	10.0	11.0
35-44	5.0	6.0	5.3	5.3	6.2	6.1	5.9	6.4	7.2	6.0
45-54	5.2	5.4	4.4	4.4	4.8	5.8	4.7	4.9	5.7	5.8
55-59	3.8	4.4	4.0	4.1	5.6	4.4	4.4	4.3	6.0	6.2
60-64	3.9	3.5	2.3	2.1	3.9	3.8	2.4	3.3	4.1	3.9
15-24	21.0	18.8	17.1	17.3	21.5	22.4	18.7	20.4	24.7	24.0
25-54	8.8	6.6	5.9	5.7	6.7	7.2	8.4	6.9	7.5	8.2
55-64	3.8	4.2	3.6	3.8	5.0	4.2	3.9	4.1	5.5	5.8
65 and over	0.7	0.8	1.7	1.4	0.8	0.4	0.4	1.6	0.4	0.2
15-64	7.7	7.5	6.7	6.5	7.8	8.2	7.2	7.7	8.7	9.1
Total	7.8	7.4	6.7	6.5	7.7	8.1	7.1	7.7	8.6	9.0
Females										
15-19	33.4	32.7	32.9	27.4	29.9	38.8	26.7	24.1	27.7	35.4
20-24	20.8	21.3	19.1	17.6	21.4	20.4	17.4	18.2	21.9	20.6
25-34	10.2	10.0	9.3	8.7	9.3	9.0	8.5	9.3	9.8	9.3
35-44	7.5	7.6	6.7	5.8	6.1	6.0	5.6	5.9	7.0	6.6
45-54	7.3	6.6	6.1	5.3	5.2	5.6	5.0	4.7	5.1	5.0
55-59	5.8	5.8	5.3	5.7	5.6	5.7	4.5	5.0	5.8	5.6
60-64	4.3	5.0	3.5	3.2	4.0	3.9	3.4	5.2	3.8	3.5
15-24	22.1	22.6	20.9	19.7	22.5	22.4	18.7	18.9	22.5	22.3
25-54	8.4	8.1	7.4	6.6	8.9	7.5	8.3	8.6	7.2	7.0
55-64	5.5	6.7	5.3	5.6	5.2	5.2	4.2	5.1	5.3	5.1
65 and over	1.3	1.0	0.0	0.7	0.2	1.8	1.6	0.6	2.3	1.6
15-64	9.5	9.4	8.5	7.8	8.1	8.6	7.2	7.4	8.2	8.0
Total	9.5	9.3	8.4	7.8	8.1	8.5	7.2	7.4	8.2	7.9
All persons										
15-24	21.5	20.5	18.8	18.0	21.9	22.4	18.7	19.8	23.7	23.2
25-54	7.4	7.2	6.6	6.1	6.8	7.3	6.4	6.7	7.4	7.6
55-64	4.4	4.8	4.2	4.4	5.1	4.6	4.0	4.5	5.4	5.4
65 and over	0.9	0.8	1.2	1.2	0.7	0.9	0.8	1.4	1.0	0.9
15-64	8.5	8.3	7.3	7.0	8.0	8.4	7.2	7.6	8.5	8.6

Note: Detailed metadata: <http://metadata.oecd.org/v1/issuematb/20160212/e3123>Disclaimer: <http://oe.cd/disclaimer>

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Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Student work: Business Plan
This documentation is relevant to Question number: Intellectual Inquiry (CC 3.b) #4	Intellectual Inquiry (CC 3B) #4
Briefly summarize the content of the file and its value as evidence supporting program review:	Capstone course (BUSN 466) individual project showing development of skills integral to the degree program

Lake Superior State University



2017
Marketing Plan
Student Ambassadors

Marketing Department

CONFIDENTIAL

This marketing plan does not imply an offering of securities.

Lake Superior State University – Marketing Plan

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I. Situation Analysis

Lake Superior State University is a 4-year institution of higher learning that has been in operation since 1946. The company's main focus is to provide high school graduates with an extended education that will encourage career development in their field of studies.

The following Situation Analysis will describe the current conditions surrounding LSSU and its products. It includes detailed information on the company's products and services, an analysis of the market, an evaluation of LSSU's competitors and distributors, historical results of marketing efforts, an industry financial analysis, and macro environment information.

Product & Service Analysis

LSSU currently offers a wide variety of degrees to customers in its target market. Our core services offer a bachelor's degree in Biology, Business, Criminal Justice, Engineering, Fisheries and Wildlife, and Nursing. These services meet the needs of our target market by providing degrees that have high career placement rates. Most consumers purchase our products and services through student loans but are provided with ample opportunities to receive scholarships to help cover the costs of tuition.

For those who are looking to continue their education beyond what was previously earned in high school, LSSU provides a learning environment highly capable of producing graduates with the potential to pursue careers with confidence in the skillsets gained from our University.

Our products give us a competitive edge because students are able to learn in an environment that gives them one-on-one attention from professors and enables them to be part of the LSSU family rather than one in a crowd.

Market Analysis

Target Market

LSSU sells primarily to students directly out of high school, military, adult learners and international students. LSSU focuses on a broad population mainly throughout the United States and Canada with "One Rate Tuition." LSSU also has outreach programs in other countries to gather international students looking to study abroad.

Lake Superior State University - Marketing Plan

Market Demographics

Understanding the following geographic, demographic, psychographic, and behavior factors is important for marketing our services to our target market. This information was taken into account as we developed our marketing and advertising strategy.

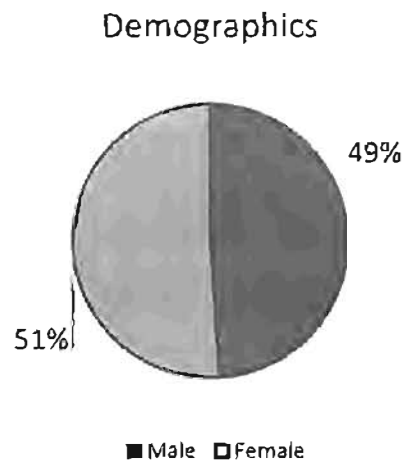
Geographic

- The immediate market for LSSU is located in the Michigan area. The population of this geographic market is almost 10 million.
- The current target market lives in the following geographical area: Michigan, Ohio, Wisconsin, Minnesota, Illinois, Indiana, and Ontario, Canada.

Demographics

Our market consists mainly of students coming from smaller towns with populations of 100,000 or less. Based on our marketing research, these are the demographics of our target market:

- Male 49% and female 51%
- Average age range of 18 to 25. Median age of 20.
- Attained a high school diploma/GED
- Interested in continuing education



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Psychographics

The psychographics of our target market describe what makes our customers *want* to earn a degree from our University.

- Small class sizes that are more personal and have higher educational outcomes with stronger social and professional network connections.
- Community-like campus
- Scholarship and Grant opportunities
- 92% acceptance rates
- One rate tuition

Behaviors

The following behaviors are typical of our target market.

- Active Lifestyle
- Outdoor activities
- Sport interests
- Small town values
- Social opportunities

Market Needs

LSSU provides customers in Michigan with a small campus that feels like you're part of a family which will increase the educational success in courses. Based on our research through a past study of *The Factors That Drive Students' Choice of Undergraduate Business School* (completed by LSSU students, Fall 2015), our target market finds the following benefits important. LSSU creates value for its customers by fulfilling these needs.

- Quality of professors
- Choices of subjects and majors
- Course flexibility
- Individual attention from professors



Lake Superior State University – Marketing Plan

Market Trends & Growth

The main trend in the extended education industry is towards a 4-year degree program that offers the ultimate college experience. It is important for LSSU to take these trends into account when it develops its strategy. Here are a few other trends that will impact our marketing efforts.

- High social media impacts
- Strong career placement
- Variety of degrees
- Practical work experience during college career- internships, real life projects, independent studies, study abroad etc.

The growth is estimated from target numbers that we are expected to reach from new marketing efforts and is dependent on the impact marketing has on target market.

Current trends suggest a decline in enrollment in high schools and declining graduation rates. However, data shows that the percentage of students going to college is increasing and provides growth opportunity in freshmen enrollment for universities.

Threats and Opportunities (SWOT) Analysis

LSSU has 10 direct competitors in its market. For the most part, our competitors target the same markets and provide products that are similar but differentiate in sizes. The main competitors for our product are the following companies:

Grand Valley State University

- Four year, Division 2 university that is located in Allendale, MI
- Yearly in-state tuition cost of \$11,363 and out of state \$16,044
- 80.4% acceptance rate
- Number of students enrolled: 25,325

Saginaw Valley State University

- Four year, division 2 university that is located in University Center, MI
- Yearly in-state tuition cost of \$8,691 and out of state \$20,409
- 80% acceptance rate
- Number of students enrolled: 9,766

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Northwood University

- Four year, Division 2 private business university that is located in Midland, MI
- Yearly tuition cost of \$23,132
- 69.5% acceptance rate
- Number of students enrolled: 1,469

Ferris State University

- Four year, Division 2 university that is located in Big Rapids, MI
- Yearly in-state tuition cost of \$10,667 and out of state \$16,467
- 78.4% acceptance rate
- Number of students enrolled: 14,533

Hillsdale College

- Co-educational, nonprofit liberal arts, Division 2 college that is located in Hillsdale, MI
- Yearly in-state tuition cost of \$24,670
- 50% acceptance rate
- Number of students enrolled: 1,490

Northern Michigan University

- Four year, Division 2 university that is located in Marquette, MI
- Yearly in-state tuition cost of \$9,324 and out of state \$14,556
- 72.1% acceptance rate
- Number of students enrolled: 8,879

Michigan Technological University

- Four year, Division 2 university that is located in Houghton, MI
- Yearly in-state tuition cost of \$14,040 and out of state \$29,520
- 75.5% acceptance rate
- Number of students enrolled: 7,238

Wayne State University

- Four year, Division 2 university that is located in Detroit, MI
- Yearly in-state tuition cost of \$11,449 and out of state \$24,472
- 77.3% acceptance rate
- Number of students enrolled: 27,222

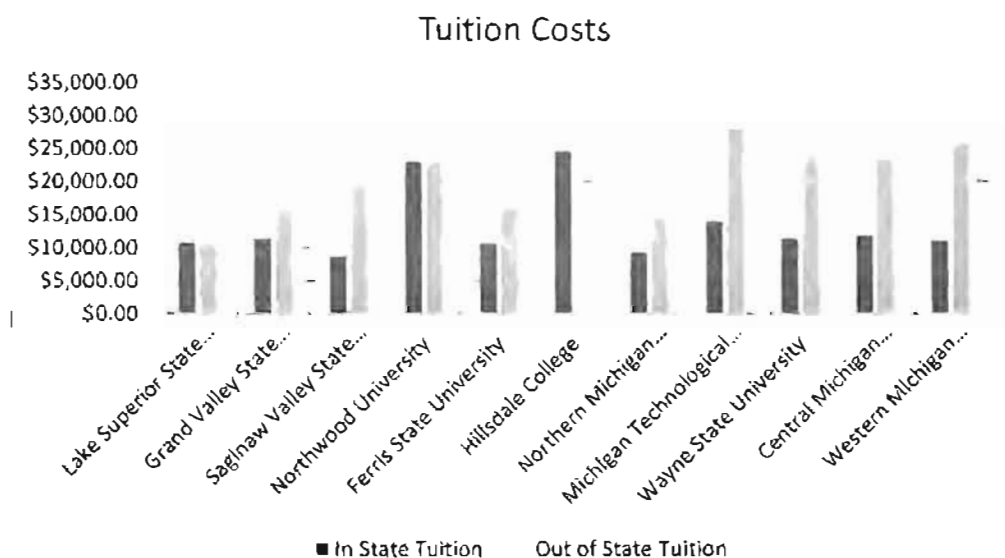
Central Michigan University

- Four year, Division 1 university that is located in Mt Pleasant, MI
- Yearly in-state tuition cost of \$11,850 and out of state \$23,670
- 69.3% acceptance rate
- Number of students enrolled: 26,968

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Western Michigan University

- Four year, Division 1 university that is located in Kalamazoo, MI
- Yearly in-state tuition cost of \$11,029 and out of state \$25,713
- 84.1% acceptance rate
- Number of students enrolled: 23,914



From previously observed information, Grand Valley State University is the greatest threat to our company's growth because Grand Valley is in the top three for graduation rates of all public universities in Michigan and is in the top four for retention. These competitors' actions in the market should be carefully monitored.

Currently, competitors in our market are moving towards attaining larger numbers of students to come to their universities. LSSU should be aware of increased efforts to recruit students from the same high schools or in similar target areas of study.

LSSU is remaining in a competitive position through allocating the university's strengths. It's important to utilize and take advantage of the market where the university is excelling the most as compared to the other direct competitors. LSSU's top strengths consist of strong student-teacher relationships from the low student-to-teacher ratios, unique student-teacher educational or instructional activities, one rate tuition for all students, the location at a border to Canada offering a variety of unique learning opportunities and experiences, various

Lake Superior State University – Marketing Plan

extreme terrain located close to campus for outdoor activities, and strong small town community connection.

Another advantage that tends to be overlooked is LSSU's tuition plateau. Marketing this strength could be beneficial by showing students that they can pay the same for 12 credits as they would for up to 17 credits. By knowing this, students can see the increased financial benefits of choosing LSSU over other universities offering similar programs but at higher costs.

These can be used as a competitive advantage by focusing marketing efforts towards students who live in cities with populations under 100,000 and those who are interested in extreme outdoor living.

Current Financial Situation

The financial situation in the market for our product has been in decline. This is due to lower numbers of incoming students than in previous years as competitors provide to market their offerings in a way that makes their campus' more appealing to potential college students. LSSU is also under pressure from the state with cuts of funding along with previous years of declines in funding. This has a direct impact on the university's financial situation due to having to re-budget funds each year and make cuts to programs within the university.

LSSU marketing efforts in our industry are concentrated in Ontario, Canada, Michigan, Ohio, Wisconsin, Indiana, Illinois, and Minnesota. This concentration occurs because these states are on, or near, Michigan borders and with one-rate tuition, potential students are seeing LSSU as a prospective college.

Other universities in our industry tend to be profitable and have a higher student population.

Historical Results

LSSU has employed various marketing efforts over the past years to reach its target audience. Some of these marketing efforts were successful and some were unsuccessful. Success for our company is defined as marketing efforts that have reached high amounts of potential students and have resulted in applications from the efforts. Efforts are deemed unsuccessful if they fail to accumulate any interest in the mind of students and don't peak any interest to go to our university.

Lake Superior State University – Marketing Plan

Successful marketing efforts tend to increase campus tour numbers and the number of students interested in coming to LSSU. On the other hand, our less successful marketing efforts tend to shift the focus from our assets of going to LSSU and can make students lean towards other universities and what they have to offer. LSSU also has greater pushback due to continuous declining state funding.

In terms of promotion and marketing efforts, LSSU experienced advantages over competitors because we offer individual attention to students in a family friendly atmosphere.

Macro Environment

LSSU should consider the following macro environment forces as it implements this marketing plan. These forces may either provide opportunities to the company or threaten the success of this marketing plan.

Demographic Forces

- The demographic forces that will have a significant impact on our university are: the graduation dates of the high school students, size of hometown, choice of major, and athletic opportunities.

Economic Forces

- The economic forces that will have an impact on the marketing plan will be scholarship opportunities and price of tuition to incoming students.

Technological Forces

- New media to communicate to incoming and current students will increase the outlook on our campus and peak student interest

II. Threats and Opportunities (SWOT) Analysis

The following SWOT (Strength, Weaknesses, Opportunities, and Threats) Analysis demonstrates where Lake Superior State University's competitive advantages and disadvantages lie and compares them with opportunities and threats in the external business environment. This analysis summarizes the information contained in the Situational Analysis.

Lake Superior State University – Marketing Plan

Internal Strengths and Weaknesses

Internally, Lake Superior State University has strengths and weaknesses, which may have a significant impact on this marketing plan. It is important to take advantage of the company's strengths when implementing this plan to create competitive advantage over our competition. At present, the company's strengths and weaknesses can be described as follows:

Strengths

- Student - teacher relationships are strong due to a low student to teacher ratio
- One rate tuition
- Located at the Canadian border offers a diverse learning experiences
- Various terrain located close to campus for outdoor activities
- Strong small town community connection

Weaknesses

- Financial instability within the institution creates an unsteady environment
- School name and brand is not well recognized
- The declining enrollment rates are created by limited resources
- Decreasing faculty in some programs
- Utilizing only the limited marketing resources

Outside Opportunities and Threats

There are many opportunities in our market for growth. At the same time, changes in the external environment could pose a threat to our company's marketing efforts. The following lists contain examples of the opportunities and threats that should be taken into consideration by management.

Opportunities

- Utilizing social media advertising in more efficient ways
- Program specific recruitment at high school events
- Utilizing "extreme" location as a bonus for perspective students who enjoy the outdoors
- Target prospective students coming from towns with a population of 100,000 and less
- Using hands on experience of Lake State learning

Lake Superior State University – Marketing Plan

Threats

- Two Canadian four year universities in a close proximity
- Decreased value of Canadian Dollar
- Other Upper Peninsula schools
- Remote location decreasing brand visibility
- Increased access to online learning platforms

SWOT Action Plan

	<i>Overcome weaknesses to pursue opportunities</i>		
<i>Pursue opportunities that fit with strengths</i>	<u>Strengths</u>	<u>Weaknesses</u>	<i>Establish a defensive plan to minimize threats</i>
	<ul style="list-style-type: none"> • Use Students to target program specific events • Sports in local terrain to attract outdoor loving students • Highlight unique location to Canada • Show strong professor and student relationships to target market 	<ul style="list-style-type: none"> • Collaboration of LSSU marketing team and marketing students to boost online presence. • Boost brand recognition • Provide support for integrated marketing group 	
	<u>Opportunities</u>	<u>Threats</u>	
	<ul style="list-style-type: none"> • Target smaller MI towns showing Soo's community • Use students to show high schoolers strength of specific programs • Market engineering while hosting and going to robotics competitions 	<ul style="list-style-type: none"> • Target marketing to LSSU programs not offered at other UP/Canadian schools • Promote highest enrollment programs 	
	<i>Minimize vulnerability to threats using strengths</i>		



LAKE SUPERIOR
STATE UNIVERSITY

III. Marketing Objectives and Issues

Based on the analysis of our target market, competition, and the opportunities available in our market, LSSU has developed marketing and financial objectives for its marketing efforts. In the end, these objectives support the LSSU's mission statement.

Lake Superior State University mission is to help students develop their full potential. We launch students on a path to rewarding careers and productive, satisfying lives. We serve the regional, state, national and global communities by contribution.

This section includes the objectives for this marketing plan, along with the keys to success and critical issues that are associated with these objectives.

Financial Objectives

The financial objectives for LSSU were established by number of admissions and compounded annual growth rate. The ultimate goal for this marketing plan is to improve the bottom line and increase shareholder value. Financial objectives are in four categories: Sales, Margins, Profits, and Ratios.

Sales Objectives

1. To increase revenue by 7%
2. To increase enrollment to 11%

Margin Objectives

1. To increase sales to \$3 million
2. To maintain gross profit margin at 80%

Profit Objectives

1. To increase the return on operating activities to \$15 million
2. To increase the investment gain to 3%

Keys to Success

In order to meet the financial goals outlined in this marketing plan, it is important that LSSU's marketing strategy does the following:

- Modest Strategic Investments
- Effective metrics for evaluating ROI
- Focusing on enrollment and retention
- Model changes to scholarships and leverage them to increase enrollment
- Reduction in allocated budget

Lake Superior State University – Marketing Plan

Marketing Objectives

After demand forecast and presuming the present business factors, we have established the following marketing objectives. These objectives support the financial objectives listed above.

Target Market Objectives

1. To enroll 960 applicants per year
2. Building brand value of the schools among high school students

Promotion & Advertising Objectives

1. Creating interest among high school students, parents, and customers
2. Stimulate demand for the seats available

Channel & Distribution Objectives

1. Recruiting 12 student ambassadors representing each school
2. Maintaining the reliability of service

Market Research Objectives

1. Events to direct market, happening places
2. Finding out better ways to entice high school students

Product Development Objectives

1. Differentiate LSSU from other universities
2. Meeting the requirement of students

Keys to Success

In order to meet the marketing objectives in this marketing plan, it is important that LSSU does the following:

- Engage with the online environment
- Enhance the web presence
- Improve connections by hiring trained marketing interns or student ambassadors
- Make the marketing decentralized to be specific and understandable
- Customized courses

Critical Issues

The following are LSSU's critical issues to keep in mind while working to obtain its objectives:

- Revenues
- Location

Lake Superior State University – Marketing Plan

IV. Marketing Strategy

Lake Superior State University is committed to providing high quality experience through unique learning, living, and social experience. Example: becoming the market leader in recruitment and education while providing unique living and social experience. We have developed a strategy to bring LSSU closer to this goal. This strategy depends on meeting high performance criteria in these areas:

- Utilizing current college students for recruitment
- Embracing the elements of the Upper Peninsula
- Utilizing small classroom sizes for effective learning
- Intense relationships with professors that will help you develop professional networks and achieve educational success
- Maintaining metrics to direct marketing efforts

The goals of Lake Superior State University's marketing strategy are to increase attendance and have more effective recruitment.

Target Market

LSSU is set within a small town. LSSU's current student body is made up of students from cities with a population of 100,000 people or less. Students are attracted to small-town values representing family and small town values. The urban students have an active lifestyle and participated in organized high school activities such as professional development programs, outdoor and sports activities.



Lake Superior State University – Marketing Plan

Positioning

Our goal is to be more relatable to our target market by having current college students interact and inform about degrees and living away from home. These aspects are valued and are important to our audience. Rural students desire strong academics, and an experience that provides flexibility and creates memories in support of their lifestyle. LSSU's product offering has unique advantages in this market place because we can relate our message to build relationships with our target market.

Unlike our competition, we will be using current college students who are able to connect more with high school students versus a normal middle-aged recruiter. It is important for us to capitalize on this advantage when we position our university in the market.

Marketing Strategies & Tactics

Lake Superior State's goal is to recruit students and to increase overall enrollment. We have established the following marketing strategies to reach this goal:

- College student's representing LSSU as ambassadors are to recruit high school students for specific programs.
- Using the location of LSSU, which is in the Upper Peninsula, as a marketing tool.

The tactics we will focus on are implementing these strategies and the programs related to these tactics are outlined below:

Lake Superior State University – Marketing Plan

Strategy #1 – Student Recruitment – We plan to use current students who will act as ambassadors and target high schools to talk about their experience at LSSU. The college students will recruit students who are interested in the same field of study as the college student.

- Specific Recruitment
 - Business
 - Nursing
 - Engineering
 - Education
 - Criminal Justice
 - Natural Science
 - Biology
 - Fisheries and Wildlife
 - Fire Science
 - Arts and Letters
 - Math and Computer Science
 - Physical Sciences
 - Recreational and Exercise Science



Lake Superior State University - Marketing Plan

Strategy #2 – Embracing the weather we experience – We often experience harsh weather throughout the winter months in the Upper Peninsula. We would like to show high school students on how we embrace the weather during the academic year.

- List of events we do
 - Downhill and Cross-Country Ski Trip
 - Snowshoeing
 - Snowboarding
 - Winter Festival
 - Hockey
 - Ice Skating
 - Ice Fishing
 - Tobogganing
 - Rock Climbing
 - Hiking
 - Swimming
 - Hunting
 - Tailgating
 - Camping



Lake Superior State University – Marketing Plan

Marketing Mix

Our main service, undergraduate degrees, enables customers to earn specialized jobs within the trade of their choice in a liberal arts setting to:

- assist them in becoming well-rounded citizens,
- obtain professional careers, and
- prepare them for graduate school.

In order to be successful, it is important that our service satisfies our customer's needs.

The following elements of our service are important to its strategic success:

- Price - By providing a competitive rate we can compete on price and perceived value
- Perceived Value - Offering students a variety of resources and an intense learning and living experience (i.e. professors, study centers, recreational area etc....) will increase the value proposition.

Pricing

The pricing of our service is competitive and is based on the costs of building operations and faculty labor. Our market is fairly developed and has many competitors; therefore, our pricing must be set competitively. Customers will be willing to pay the set prices for our product because it creates value for them.

Promotions

In the past, we have had success promoting our service by having recruiters visit schools and college fairs to talk to potential students. To communicate clearly with our customers it is important that we present a consistent marketing message between the different marketing channels. We will integrate our marketing communications in the following categories:

- Advertising - Placing ads on social media channels that we know high school students use often.
- Public Relations and Publicity - Promote LSSU in a positive light by getting involved with the local community.
- Direct Marketing - Mail information to students who show an interest in attending LSSU.
- Promotions and Events - LSSU will attend college fairs at small high schools to give away brochures and information.
- Product Marketing Materials - Brochures, T-Shirts, LSSU Hockey Pucks, Pens, Coffee Mugs.

Lake Superior State University – Marketing Plan

Distribution

The main distribution channels for our service are through in-person classes. In order to make our service more accessible we can provide more online classes to students who wish to study from home.



We want our product to seem valuable and cost-effective, so it makes sense to provide more online classes.

Marketing Research

LSSU has monitored its student body over time and identified the following group characteristics that will provide additional insight over time.

Focus Groups

Two focus groups

A. High school seniors (7-12 participants)

In order to engage discussion the following questions will be asked by the monitor:

1. What do you think of this admissions folder?
2. Would you consider applying to this university based off of these materials?
3. What do you think of small classroom sizes?
4. What criteria must a university have for you to enroll?
5. What are key factors you consider when looking at universities to apply to?

B. Freshmen & transfer students

1. Why are you here?
2. What made you apply to Lake Superior State University?
3. How did you find out about Lake Superior State University?

Lake Superior State University – Marketing Plan

4. Given these materials (admission folder) would you have considered enrolling?
5. What are some aspects the university should consider when recruiting students?



Internal Data

Gathering information from all school recruitment centers and admissions.

- Finding out how we reach students?
- What is most receptive?
- Are students applying online?
- How many students apply at a college fair, mail etc.

Summary

The marketing plan will decentralize the recruiting process with students representing specific schools and niche markets. The student's representing the specific schools and programs at LSSU will focus on their personal experience and describe the education experience. Also, the student's will talk about their living experience along with their social experience at LSSU.

V. Action Items

Using the strategy and objectives in this marketing plan, LSSU has established milestones to ensure that this plan is implemented successfully. This section includes these milestones, along with information on who in the company will be responsible for their success. An overview of the members of our marketing team, along with an organization chart for the department, is also included.

Lake Superior State University – Marketing Plan

Milestones

Ensuring that the tasks outlined in this marketing plan are implemented on time and on budget is fundamental to LSSU's marketing success. These milestones identify the key projects, along with their start and end dates, budgets, and responsible managers and departments.

Marketing Organization

The marketing director leads the marketing efforts of LSSU. He/she is responsible for overseeing the implementation of these specific actions as part of the marketing plan. Various individuals and groups within the institution will also support these efforts.

- LSSU – Responsible for **Integrated Marketing Committee**
- Director of Admissions - Annette Hackbarth-Onson, Responsible for **Admissions Department**
- **The Schools** – Departments will assist in identifying events and educational gatherings that are specific to the school's major. Each school has to identify a minimum of 10 events or the opportunity to reach 150 students for their specific major in the current geographic recruiting region of the University

The Students Ambassadors' Profile is the following:

- Basic skills: Microsoft Office, Driving, Analytical skills
- Interpersonal skills:
 - Public speaking
 - Professional work ethic
 - Ambitious
 - Excellent verbal and written communication skills
 - Energetic and Enthusiastic
 - Knowledgeable of their departments
 - GPA at least 2.5

Training:

Being a Student Ambassador is a rewarding opportunity both on a personal level and also in terms of your career prospects after leaving Lake Superior State University.

Lake Superior State University – Marketing Plan

The students become the face of the University and as part of this role; they will relay information about our LSSU experience to the prospective students of tomorrow. The students will be highly influential in decisions that have a big impact on the University including a student's decision to study with LSSU.

Structure:

Student Ambassadors will be trained by Admission and report directly to the Marketing Director.

Student Ambassadors will work directly with the schools to identify opportunities and events to interact with a niche high school student group for recruitment for specific school and majors.

Evaluation Matrix and Assumptions:

The Goal for each Student Ambassador representing a LSSU school:

He/she has to generate 40 applications per school per semester. Based on a 1:4 conversion will result in 10 new students per school per semester or 120 students per semester or 240 students per academic year.

At this time we estimate that a trained student ambassador contacting niche student markets will generate a more efficient ratio in recruiting students. The student application ratio is estimated at 10:3. The ambassador will generate 3 applications per 10 students in event that is specific to a major. We have to realize that there will be differences by major and event.

VI. Financials, Budgets, and Forecasts

This section of our marketing plan will address the financial projections and requirements for Lake Superior State University's student recruitment program. Included are a recruitment analysis, operations forecast, cost of sales, and marketing budget forecast.

Lake Superior State University – Marketing Plan

Recruitment Analysis

Tuition Revenue Assumption	Semester	Academic Year
Average Revenue	\$5,412.00	\$10,824.00
Average Discount Rate 25%	\$1,353.00	\$2,706.00
Net Contribution	\$4,059.00	\$8,118.00

Cost Associated to Ambassadors		
Estimated Hourly Cost per student	\$10.50	10 hours per week per semester
Estimated Cost per Event	\$175.00	10 events per semester

Operations Forecast

LSSU has to recognize that a new program will associate to risk and allocation of resources and will not meet all the assumptions.

The Operational Forecast has to recognize this situation in the development process and estimates conservative implementation progress for the ambassador program. We estimate that we will reach an efficiency level of:

- 60% during year one
- 80% during year two
- 80+% during the subsequence years of the program

We also estimate that schools will identify additional opportunities and events for student ambassadors to attend. This will add one (1) additional student ambassador for six (6) schools in year the 3rd year.

Each student ambassador will generate a minimum 80 applications per academic year. The current conversion rate is 4:1 or 4 applications are turned into 1 registered student. We believe that the conversion efficiency will increase in the 3rd year to 3:1 or 3 applications are turned into 1 registered student.

The measure of success for Lake Superior State University's student recruitment program will be to convert 144 students in 2017/18, 256 students in 2018/19, and 384 students in 2019/20. To do this, 12 ambassadors will have 80 applications in academic year 2017/18 and 2018/19. The forecast demand will create the need to add six (6) more student ambassadors bringing the total to eighteen ambassadors for the academic year 2019/20.

Lake Superior State University – Marketing Plan

Student recruitment is projected to increase enrollment as we implement the marketing strategies outlined in this plan.

Start date is estimated for the Fall of 2017 academic year of 2017, enrollment is expected to be higher as Lake Superior State University employs ambassadors to advertise individual programs to high school students at ten events. By the end of the academic year of 2017/18, it is anticipated that the high school student recruitment plan will improve our enrollments and increase revenues.

By end of the 2017/18 academic year, we expect a 7% increase in enrollment using current measures and assuming that current marketing activities continue to contribute results for LSSU. At the end of the 2018/19 academic year, the growth rate will increase to 11% and then in 2019/20 it will increase to 14%.

The following chart outlines the operations forecast for Lake Superior State University:

	2016-2017	2017-2018	2018-2019	2019-2020
Ambassador Students		12	12	18
Applications Filled		576	768	1152
New Student Conversion		144	256	384
Total Enrollment	2000	2144	2400	2784
% Enrollment Increase		7%	11%	14%
Sales Forecast		\$ 584,496	\$ 1,039,104	\$ 1,558,656

Cost of Sales Forecast

Each sales channel in our sales forecast has expenses associated with the student recruitment program. The following chart projects the cost of sales in 2017 and 2018 for twelve ambassadors and eighteen ambassadors in 2019. The labor costs are included in the cost of sales forecast. The labor cost per week for the academic years of 2017/18 and 2018/19 is \$1,260.00. Also, the academic years of 2019/20 have a labor cost of \$1,890.00 per week. The chart below states the labor costs per semester, academic year, average costs for the ten events, and finally the total costs per semester and academic years.

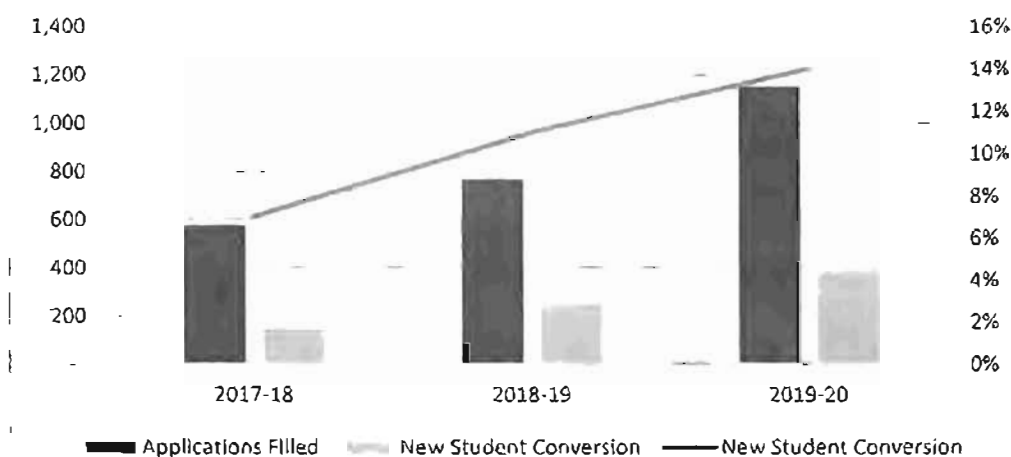
Lake Superior State University - Marketing Plan

Cost Assumptions				Average Cost	Average Cost
Academic Year	Student Ambassador	Hourly Rate Semester	Hourly Rate Academic Year	10 events Semester	20 events Academic Year
2017-2018	12	\$18,900	\$37,800	\$21,000	\$42,000
2018-2019	12	\$18,900	\$37,800	\$21,000	\$42,000
2019-2020	18	\$28,350	\$56,700	\$31,500	\$63,000

Marketing Budget Forecast

The marketing expenses have been budgeted to coincide with the sales forecast. High school student recruitment requires a fairly fixed budget and will not vary substantially from year to year. The annual budget for Lake Superior State University's student recruitment program for the academic years of 2017 and 2018 is \$2,100.00 and then in 2019 is \$3,150.00.

New Student Enrollment



Lake Superior State University – Marketing Plan

Sales vs. Expense Summary

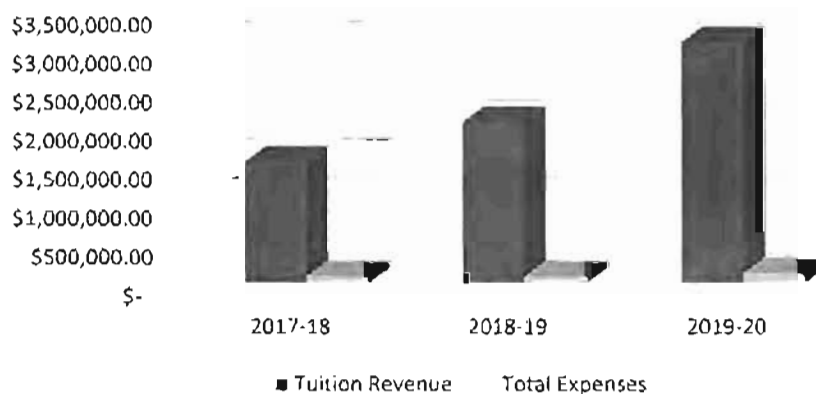
The following chart summarizes the expected sales forecast and budget projections outlined in this section of the marketing plan.

Operational Forecast				
Academic Year	2016-2017	2017-2018	2018-2019	2019-2020
Ambassador Students		12	12	18
Applications Goals		960	960	1440
Discounted efficiency factor		60%	80%	80%
Applications Submitted		576	768	1152
Student Enrollment 1:4		144	192	384
Estimated Enrollment	2000	2144	2400	2784
% Enrollment increase		7%	11%	14%
Estimated Tuition Revenues		\$1,558,656.00	\$2,078,208.00	\$3,117,312.00

Estimated Expenses				
Ambassadors Hours		\$37,800.00	\$37,800.00	\$56,700.00
Event Costs		\$42,000.00	\$42,000.00	\$63,000.00
Total Expenses		\$79,800.00	\$79,800.00	\$119,700.00

Net Contributions to Operations		\$1,478,856.00	\$1,998,408.00	\$2,997,612.00
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Revenue vs. Expenses



Lake Superior State University – Marketing Plan

VII. Controls

This section outlines how the progress of this marketing plan will be monitored and plans for difficulties that the company may face during its implementation.

Performance Monitoring

This marketing plan was developed give direction to Lake Superior State University's sales and marketing efforts. Performance will be monitored in the following areas:

1. Quality of Hire Measures
 - a. Due to the academic year turnover and summer break, we need to minimize time & expenditure on training by hiring students that have prior knowledge and are well-informed by requiring reference checks, a cover letter and a general skills tests.
2. Cost of Student Acquisition
 - a. At the current average salary of \$28,748 at 70 students per recruiter per year, the current cost of student acquisition is \$410.69. With a \$3,500 grant per recruiter per year, the cost of acquisition should be no more than \$350.
3. Recruiter Time Effectiveness
 - a. Events need to be carefully selected at least one month prior and need to meet the following criteria: average age of attendants should be between 15-18, distance should be no more than 100 miles without carpooling, there must be a direct relationship to a relevant major programs, and there needs to be at least 100 people in attendance.
4. Recruiter Requisition Load
 - a. Requisition load is 80 Applicants per recruiter per year. The applications are submitted directly to admissions to track results. At a 1:4 conversion rate. Based on 80 applications LSSU will gain an additional 20 students per academic year per recruiter reaching new niche markets.

Revenue - 20 students * 8,188 = \$162,360

Variable Cost - 20 events per year * \$175 = \$3500

Recruitment Pay - 30 weeks per year*\$105 per week = \$3150

Total Revenue = \$155,710

Lake Superior State University – Marketing Plan

- b. Note that if requisition load is not met, if a recruiter submits at least 8 applicants per year, we can reasonably assume 2 Admits which would still generate \$9,586 after all expenses.

Revenue -	2 applications*\$8,118 = \$16,236
Variable Cost	\$3500
Recruitment Pay	\$3,150
 Total Revenue =	 \$9,586

Reports showing the progress of these performance measurements will be distributed to the Admissions Director on a monthly basis. Each recruiter will be responsible for preparing and distributing these reports.

Contingency Planning

The largest hurdles that Lake Superior State University will face in the implementation of this marketing plan are included in this list:

- Schedule conflicts for student recruiters
 - o Current upper class students tend to have complex schedules
- Travel Time for events
 - o Large travel times may be inefficient use of funding
- Quality of student recruiters
 - o High quality student recruiters may not be attracted to position

These potential difficulties and risks have been minimized through:

- Cross-Training which allows the same number of recruiters while providing schedule flexibility
- Plan for events at least one month prior which allows for coordination of events in territories and may allow for carpooling
- Provide grant-credit-internship package which allow students to receive payment and college credit making the position more competitive

The worst case scenarios for Lake Superior State University are the following:

- No Increase in Enrollment
 - o Inefficient use of funds
- Decrease in Retention Rates
 - o Misinformation from poorly trained recruiters may lead to dissatisfaction and potentially more transfers
- Decrease in Enrollment
 - o Poor actions by recruiters may dissuade potential students that were considering Lake Superior State University

Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to directly this Word document. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Student work: "Why Do Men Experience Less Cognitive Dissonance?"
This documentation is relevant to Question number: Intellectual Inquiry (CC 3.b) #4	Intellectual Inquiry (CC 3B) #4
Briefly summarize the content of the file and its value as evidence supporting program review:	Individual presentation in MRKT 381 (Consumer Behavior) illustrating mastery of creative work and development of skills important to the degree

Why Do Men Experience Less Buyer's Remorse?

Qualifications and Assumptions

- Buyer's Remorse- Also known as Cognitive Dissonance, this is when people experience feelings of regret or guilt after a purchase.
- Impulse Buy- A purchase made by a consumer without much thought or prior planning.
- Positive Connection- In research, a positive connection means that both variables move in the same direction.
- My assumption is that Men experience less buyer's remorse than women because men, overall, care less about the shopping experience, and because Men on average have more money to spend than women.
- The Goal of this study is to prove that men do actually experience more Buyer's Remorse than women, and attempt to find out why.

Secondary Research Findings (No Supporting Data)

- Tifferet, Herstein (2012)
 - Women have higher levels of impulse buying compared to men.
- Gillespie (2014)
 - Women in the United States make less than men on average
- Kaur (2014)
 - There is a strong positive connection between unintended purchases and buyer's remorse.

Secondary Research Continued

- Siddiqui (2016)
 - Men are less concerned with how a “problem” (need) is solved, and more concerned than women about simply solving the problem.
 - Women have much more involvement in the buying process than men, especially with emotional involvement.
 - Men are more concerned with quality and efficiency.
 - Women will look at all available information, while men focus on the most present cue.
 - Men make purchases based on immediate needs, and women purchase as a long-term decision.

Secondary Research Conclusion

- In conclusion, it is true that men make more than women in the United States, and this leaves them with a cushion of discretionary income, lessening feelings of GUILT after a purchase.
- Women actually do impulse buy more than men do, and the more a consumer impulse buys, the more buyer's remorse they feel. Therefore, it would be feasible to conclude that women feel more buyer's remorse than men.
- Men are less emotionally invested in the shopping experience, and Women have a higher involvement than men when making a purchase, leading to more buyer's remorse in women as they question whether or not they made the right decision.

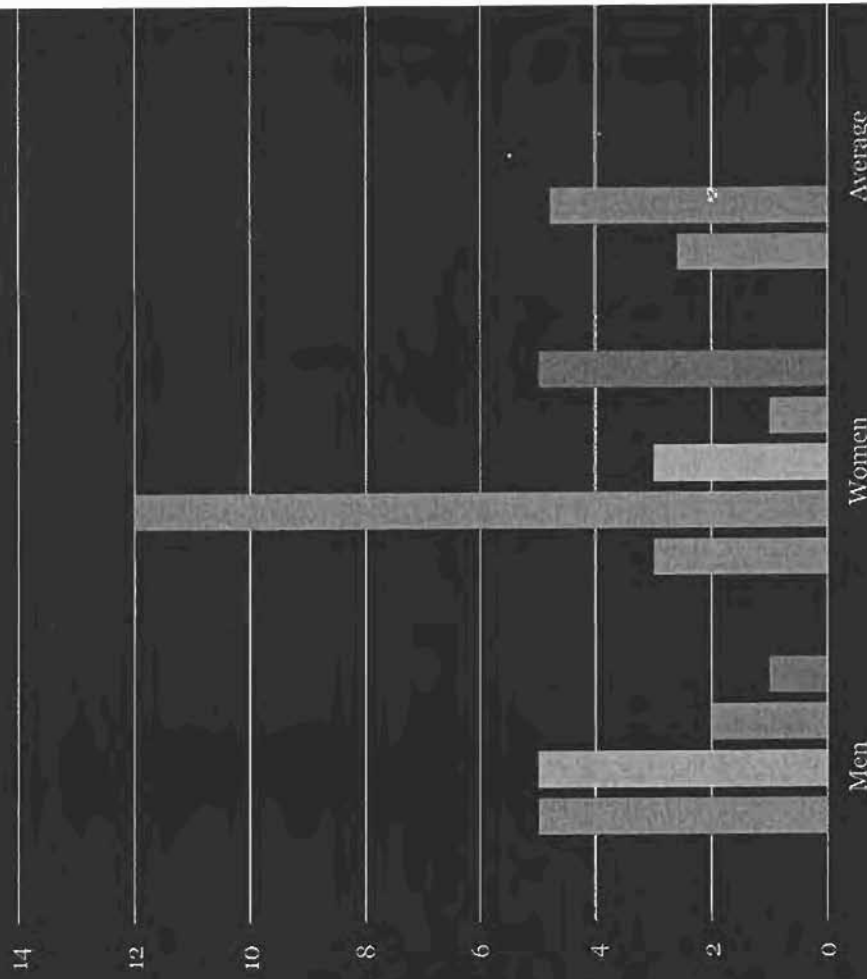
Primary Research

- I performed a survey on 10 peers, five women and five men. All were college students aged 19-25.
- They questions were:
 - Do you often find yourself buying things on impulse?
 - Do you remember the last impulse purchase you made?
 - Did you feel any regret or guilt after purchasing your most recent impulse purchase?
 - Do you worry about your finances?
 - Do you enjoy shopping?
 - How many times in the last year would you estimate that you have experienced guilt or regret after a purchase.

How many times in the last year have you Experienced Buyers Remorse?

Primary Research Findings

College-Aged Participants Responding "Yes"



How many times in the last year have you experienced Buyer's Remorse?

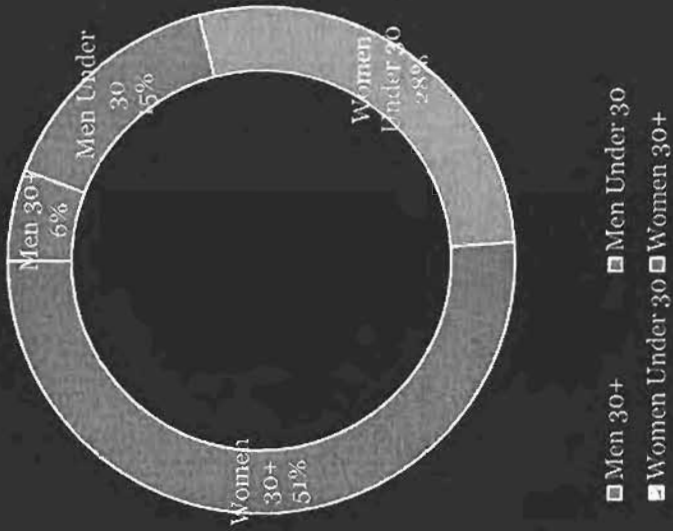
Primary Research Findings

Older Participants Responding "Yes"

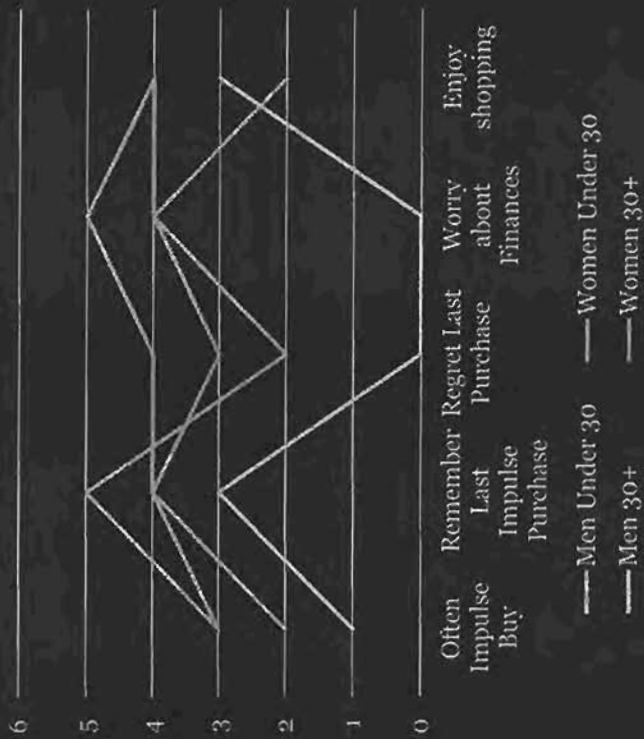


Primary Research Findings

Average Number of Buyers Remorse feelings Per Year as Percentage of Total Regret.



Overall Comparison



Primary Research Findings

- Women purchase on impulse more as they get older, and men less as they age.
- Across the board, women showed higher levels of regret, financial worry, and enjoyment of shopping
- Women showed 3x more regret than did men in the last year.
- College-aged men, although still worried about finances, showed the least interest in shopping, showing they are less attached to the experience, and confirming less investment in the process.
- The trend in men is very similar, besides the fact that college-aged men worry about finances, and the female trend is also closely related.
- College-aged males show more impulse than College-aged females, and as much impulse as females who were 30+, however they still showed lower levels of regret than both categories.
- College-aged men, although still worried about finances, showed the least interest in shopping, showing they are less attached to the experience, and confirming less investment in the process.

My Conclusions

- Buyer's Remorse does exist in women more than in men.
- Men worry less about money, and therefore worry less about spending it, and feel less regret after doing so.
- Men are much less emotionally attached to the shopping experience, and are more distant from the products they buy.
- Women do buy more impulsively than men do, unless the men are college-aged.

All assumptions and secondary data research confirmed.

- Direct Quotes: (All quotes unprovoked)
- Female Subject aged 30+
 - “It really depends on the purchase for me, I think about the price, quality, and whether or not I am satisfied with the product.”
- Male Subjects aged 30+
 - “Regret comes in two forms, regretting spending the money, and regretting the specific product because it was crap. I only regret the purchase if the product sucked”
 - “If I’m gunna buy something I’m not going to regret it later, I already bought it”

Thank You!

Resources

- Sigal Tifferet, Ram Herstein, (2012) "Gender differences in brand commitment, impulse buying, and hedonic consumption", *Journal of Product & Brand Management*, Vol. 21 Issue: 3, pp.176-182, <https://doi.org/10.1108/10610421211228793>
- Waqaruddin Siddiqui, (2016) "Study on Buying Behavior on men and women" <https://www.onlinejournal.in/IJRV/214/128.pdf>
- Prabhjot Kaur, (2014) "Unintended Buying and Post-Purchase Buyers Remorse: A study of consumer perceptions" <http://www.publishingindia.com/GeltBrochure.aspx?query=UERGOnJY2h1cmVzfC8yNDMwLnBlkZmwwMjQzMjUwZGY>
- Gillespie, Kathleen M., "Unequal Pay: The Role of Gender" (2014). Honors Theses and Capstones. 205. <http://scholars.uhh.edu/honors/205>

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Student work: Case Analysis "Sainsbury Cola"
This documentation is relevant to Question number: Intellectual Inquiry (CC 3.b) #4	Intellectual Inquiry (CC 3B) #4
Briefly summarize the content of the file and its value as evidence supporting program review:	Team case analysis in MRKT 281 (Marketing Principles and Strategy) showing development of business case analytical thinking and communication

Case Analysis: Sainsbury Cola

I. Problem Statement:

Coca Cola is being affected by the rise of Sainsbury Cola. This new company has taken part of the market share of Coca Cola caused by the similar tasting product and packaging, along with the cheaper pricing. With being manufactured by Toronto-based Cott Corp., the company that supplies WalMart stores in the U.S, Sainsbury Cola is taking up shelf spaces. Due to the lack of action Coca Cola has taken towards Sainsbury Cola may cause a vast decrease in Coca Colas sales.

II. Situation Analysis:

Macroenvironment:

Competition: Sainsbury Cola, due to the similar product and selling it at a cheaper price.

Socio-cultural: increase demand for cheaper, private label brands of Cola vs original, national brand Coca Cola.

Microenvironment:

Product: Dependency on their product of Coca Cola, despite other products they have.

Price: Coca Cola's higher prices may be affecting their sales.

Promotion: Appears to be good, need more in Canada.

Distribution: Supply more in U.S vs. Canada or Britain. Signed agreements in Canada for better shelf space.

III. Feasible Alternatives and Evaluation:

A. Sue Sainsbury Cola

Pro: Gain monetary retribution; discourage competing companies from creating more future look-alikes

Con: Case could be lost, creating a loss of resources

B. Do nothing

Pro: The new soda might not be popular and Coca Cola would not expend any resources to fight the competing product

Con: Sainsbury Cola may "steal" market share from Coca Cola; other look-alike companies may be encouraged by this judicial precedent

C. Create social media marketing campaign to discourage purchasing of Sainsbury Cola

Pro: Market share loss can be minimalized; most social media platforms are free

Con: Marketing campaigns can create very negative public relations if the public does not agree with Coca Cola

D. Create television and radio marketing campaign to discourage purchasing of Sainsbury Cola

Pro: Market share loss can be minimalized; Television and radio reach a different target demographic than social media does, specifically an older demographic

Con: Television and radio campaigns can be more costly than those of social media

E. Buy out the Sainsbury Cola company

Pro: Market share can be retained relatively quietly without causing a stir or bad public relations.

Con: Stopping one look-alike company will not stop others from forming

F. Focus sales elsewhere and not waste resources trying to fight the unique British definition of trademark laws

Pro: Sales can be bolstered in other more legally sheltered EU countries

Con: Great Britain already makes up a significant percent of Coca Cola international revenue

IV. Recommendation:

Coca Cola should sue Sainsbury Cola company or buy out the company. Sainsbury has the similar taste and packaging of Coca Cola. Even though Sainsbury did check with their legal counsel, Coca Cola still has a good case. The company would gain monetary retribution and would stop other look like brands from trying to test them. If Coca Cola does not to cause conflict with public relations, they could buy out Sainsbury. Market share can be retained quickly so it would be a fast process. Another possible action that could occur would be to not waste time or money on fighting the company. Coca Cola has very good products and they should not worry about the look alike companies.

Sainsbury Cola

Becca, Bryan, Jake, Jayson

I. Problem Statement:

Creating similar packaging to Coca Cola, Sainsbury Cola is attempting to gain more market share. Consumers are forced to make a choice when shopping, go for the original and stick with their sense of brand loyalty, or be price conscious. Sainsbury's private label cola is a new competitor for Coke and is fighting for a piece of Coke's 60% market share.

II. Situation Analysis:

A. Macro-environment

Competition- Sainsbury's new private label cola is packaged similar to Coke, but costs 25% less

B. Micro-environment

Price- Sainsbury costs 25% less than Coke

Product- Sainsbury's cola has a similar packaging style to Coke's popular design

Promotion- Information not provided

Distribution- In Sainsbury locations

III. Feasible Alternatives and Evaluation:

Coke could sue Sainsbury

Pro- It could bring up the controversy with Sainsbury and draw people to the conclusion that Sainsbury is being unfair.

Con- Nothing could come from the lawsuit, and people could see Coke as being unfair for suing a smaller company.

Depend on brand loyalty

Pro- By depending on the brand Coke could focus on other issues and hope the issue would sort itself out.

Con- Doing nothing and depending on brand loyalty could go wrong because there might not be as much brand loyalty as Coke originally thought and depended on.

Appeal for more shelf space within the stores

Pro- More shelf space means more of your product available for viewing and it could crowd competitors together.

Con- Too much shelf space can be unappealing to consumers, and they might go for the less shown, lower priced goods.

Create a series of advertisements or promotion

Pro- Advertising can bring awareness to the product and create a spike in sales for a time, during that time competitors sales could decrease.

Con- Advertising cost money, and the sales might not match up with the cost of advertising.

Buy Sainsbury

Pro- Buying out a competitor gets rid of that competition

Con- Buying out a competitor of Sainsbury's size would cost a lot of money and take a lot of time.

Focus on other countries

Pro- Focusing on driving sales in other countries and increasing their market share elsewhere, which could account for any lost market share to Sainsbury.

Con- Ignoring the Sainsbury problem and focusing on driving sales in other countries could have an adverse effect, because Coke's other competitors could see them as lazy for not doing anything about Sainsbury.

IV. Recommendation:

Coke should depend on brand loyalty. They already have a 60% market share and are a distinct company. Consumers recognize and know the brand. While some consumers will switch to the less expensive option, many consumers will have brand loyalty and continue to drink Coke. Many people can be particular about how their soda tastes and will only buy the soda they like.

Coke could also run advertisements or promotions in Britain to compete with Sainsbury. Advertising or a promotions can draw an increased amount of consumers for a short period of time, and it can also draw consumers away from Sainsbury. With decreased consumers Sainsbury may have to change their marketing scheme. Even if Coke loses some money on advertising and promotions, they will still have their market share.

Another reasonable option for Coke would be to buy out Sainsbury. Coke is a massive company and could easily afford it, even if they did lose a good amount of money, they would easily make it all back and then some. Coke would get the Sainsbury market share to add on to what they have already. In the end, it would possibly give Coke a negative image for buying out smaller companies just to decrease competition and make more money, but that's how business works.

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Student work: "The Marketing Club"
This documentation is relevant to Question number: Intellectual Inquiry (CC 3.b) #4	Intellectual Inquiry (CC 3B) #4
Briefly summarize the content of the file and its value as evidence supporting program review:	Team work in MGMT 360 (Management Principles and Concepts), Included to show how students are encouraged to pursue their own creative interests

LSSU Marketing Club

“Inspire, Create & Collaborate”



Management 360





Case Note & Plan

Group Project Case Note and Outline

Group Project Title

Building and Developing the Marketing Club

Group Members' Names / Email Addresses / Agreed-Upon Roles & Responsibilities

Names				
Emails				
Role	Marketing/ Recruiting	Team Leader	Marketing/Recruiting	Design/ Marketing

Issue Statement

The Marketing Club at Lake Superior State University is a new club as of this year, 2017 and has very little, if any money to help fund their club's projects and activities. The individuals amongst our team all are pursuing degrees related to marketing, so as a group we feel that it is vital to help strengthen the Marketing Club so that it will remain and be a prominent force on campus and in the community of Sault Ste. Marie, MI. We want to create an event that allows college students to gather in a comfortable and fun environment to compete head to head in a water pong tournament.

1. Concepts to Analyze (Related to Course Material)

Chapter #	1	1	1	1	3
Concept	Planning	Organizing	Lead	Controlling	Sociocultural

Chapter #	3	3	3	3	3
Concept	Customers	Economic	Slogans	Social Values	Communication Differences

2. Please list the business, organization or department that you will consider evaluating for your case analysis:

Lake Superior State University Marketing Club

3. Please identify evaluation methods to be used to collect data and information:

- Going to the club to see how the club is run
- Talking and asking questions to the club president, Jordan Van Loo
- Keep track of any complications- goal is to keep minimal.

4. Identify your group charter (four to five values you wish to reinforce to frame a healthy work environment for you to work together):

- An open and friendly environment where everyone feels comfortable to share their ideas.
- Creative thinking
- Goal driven
- Organized and efficient
- Respectful

We will keep these values in our group by keeping each other accountable for our actions.

Agreed-Upon Roles / Responsibilities & Timelines (Remember Introduction / Conclusion)

Name	Role / Responsibility and Milestone Tasks	Agreed-Upon Timeline
[Redacted]	Organizer	
	Team Leader	
	Marketing	
	Design (poster)	

Identified Strengths Within the Team (List 4 at a minimum)

Strong Communication	Organized	Efficient
Plan Oriented	Respectful	Motivated

Identified Weaknesses (Potential Knowledge Gaps) Within the Team (List)

Weaknesses	Limited time working together	Staying on task/talkative	
Strategies to Address	Meetings to make sure everyone is on task	Staying focused and task driven	



Estimated Schedule:

WEEK OF:	PLAN	Notes
10.9.17	Group Meeting Discuss <ol style="list-style-type: none"> 1. Official Project Title 2. Club Slogan 3. Club Logo 4. Club Mission Statement 	<ol style="list-style-type: none"> 1. 3 Ideas for the logo were made. 2. 2 possible mission statements 3. Talked about why we are doing this project and the benefit of it.
10.16.17	Group Meeting Discuss: <ol style="list-style-type: none"> 1. Finalize Project Title 2. Finalize Slogan 3. Finalize Logo 4. Finalize Mission Statement 5. Discuss Target Market 6. Discuss Strategies 7. We can work on the Individual Case Study Analysis if wanted. 	<ol style="list-style-type: none"> 1. Mission Statement is finalized. 2. Logo is finalized. 3. Target Market is finalized. 4. Finished the Case Study Analysis. 5. Discussed strategies and how we are going to incorporate the strategies to the benefit of the Marketing Club.
10.23.17	Group Meeting + ██████████ Discuss <ol style="list-style-type: none"> 1. Discuss options with ██████████ and what we have come up with so far to get his opinion. 2. Discuss different major triggers that could invite different majors to the club. 	<ol style="list-style-type: none"> 1. Met with ██████████ to discuss our possible options. 2. He agreed on the logo and the mission statement. 3. Recommended we look into how we can look into creating a poster,
10.23.17	INDIVIDUAL CASE STUDY ANALYSIS DUE	FINISHED
10.30.17	Need to start working on the Case Story and Case Report.	<ol style="list-style-type: none"> 1. Met and planned how we were going to come up with ideas and created a new Google Docs to add

		everything into.
11.6.17	<ol style="list-style-type: none"> 1. Finalizing project goals. 2. A clear understanding of what we are trying to accomplish and how we are going to accomplish those goals. 	<ol style="list-style-type: none"> 1. Project goals were finalized. 2. Finalization of document except for fundraiser events.
11.13.17	<ol style="list-style-type: none"> 1. Work on fundraiser information. 2. Create posters for fundraisers and how we could get people to participate in the events. 3. Figure out how the Marketing Club could get rewards for the fundraisers. 4. Put document into the correct order. 	<ol style="list-style-type: none"> 1. Fundraiser section is completed.
11.20.17	THANKSGIVING BREAK	
11.27.17	<ol style="list-style-type: none"> 1. Finalization of Document including every aspect of the project. 2. Creation of the presentation 3. Practice the presentation 	<ol style="list-style-type: none"> 1. Document is finalized 2. Presentation is finalized.
TO DO BEFORE FINAL DUE DATE	<ol style="list-style-type: none"> 1. Print off final paper 2. Print off presentation 	
11.27.17	CASE STORY AND CASE REPORT DUE	
12.4.17	PRESENTATION	

Case Story

The Marketing Club is a new club at Lake Superior State University as of Fall 2017. It is a small club with six members that attend meetings every Monday at 6 p.m. Management 360 took on this project to develop strategies to grow the club and to raise money. The students realized that there is not enough marketing for the Marketing Club. Ironic, right?

The intent of this project is to help grow and develop the newly established LSSU Marketing Club. We are doing this to help establish the new founded club and to help raise money for them to attend conferences, competitions, and to help other local clubs on campus.

The students have met with the club President, [REDACTED] to discuss the problems and what they could do to help those problems. There were issues because of the lack of money so we decided to form two different fundraisers that the club could put on to raise money. As we met with [REDACTED] he discussed these recommendations with the club to receive their input so every member would be on board. We discussed different marketing options like an open Facebook page, Instagram, Twitter, and Snapchat. The students could use Snapchat to post different meetings, presentations, projects they are working on. The club would place their snapcode on the posters that they hang around campus for students to add the username.

The Management 360 students worked with the Marketing Club to establish new strategies. With these new strategies, the club will be able to recruit, and raise money to help establish the club. Once the club is established and running, the club will be able to attend conferences, and competitions around the country.

money to be able to attend conferences around the country and expand your knowledge in the business marketing field.

Memorandum

To: Lake Superior State University Marketing Club

From: Management 360 Student's

Subject: Club Growth and Fundraising Ideas

Date: December 1, 2017

The purpose of this memo is to provide the Marketing Club with advice on how to grow the club and how to raise funds to be able to attend conferences to expand their knowledge in the business marketing field. The basis of these recommendations to help grow and raise funds come from the following:

- Snowball Slow Pitch Softball Tournament
- Water Pong Tournament

The above events will both raise funds and create awareness for students who are unaware, and are looking for new opportunities to expand their knowledge and experience in the business field. The snowball tournament creates a fun environment that gives students something to do during the long winter months. This tournament will also help provide a sufficient amount of money to help cover and cost the club may experience. The water pong tournament is great fundraising event for the beginning of the year when you are looking to add new members who are just coming into their first year of school. This tournament may not raise as much money as the softball tournament, but it will create more recruits and knowledge of the club to individuals who attend the tournament.

Based on the above outline of the two tournament's, this will help create funds and will also help grow the club. As you gain more members, you will be able to do more events like the ones outlined above. Eventually, you will be able to create a sufficient amount of

Executive Summary

This Executive Summary highlights the main goals and recommendations to the Marketing Club. This document describes the entirety of the club in a few pages. This document is designed to guide you on the creation of the critical components.

Club Overview

The intent of this project is to help grow and develop the newly established LSSU Marketing Club. We are doing this to help establish the new founded club and to help raise money for them to attend conferences, competitions, and to help other local clubs on campus.

Mission Statement

Lake Superior State University's Marketing Club seeks to support members to excel in their selected careers by providing opportunities for professional development.

Problem

The Marketing Club has not established any significant problems in the meeting but Management 360 students have found that there would be a few ways to benefit the club for the better. Gaining new members could benefit the club because there would be more opinions and different people to bounce ideas off of. The club has a low budget, if any budget at all. Fundraising would help them to attend conferences and competitions to expand their knowledge and experience in the business marketing world. This project will contain two fundraising event ideas that the club can implement and perform, and the setup process of establishing everyone's roles in the club.

Goals

The goals of this project include the startup of the Marketing Club. This includes recruiting LSSU students to join the Marketing Club, creating fundraisers, creating logos, the mission statement, posters, etc.

Target Market

Our goal is to target Business majors who are interested in the field of marketing. We can target these students by hanging posters in the library and class buildings.

Promotion within the classroom by professors and students will create an impact as well.

These students will receive business work experience before entering the workforce to put on their resume. It could also help influence undecided majors or interest those looking to switch majors to the field of marketing.

Marketing Strategy

The Marketing Club should try to gain new members from different majors. The Marketing Club should provide information on social media, design marketing plans to resolve campus issues to create interest, design a website or social media page where people can request help from the marketing club, and make it apparent that all majors are welcome.

Club Management

The Marketing Club is scheduled for every Monday night at 6 p.m. [REDACTED] is the President of the student club and he runs the meetings himself. Weekly tasks are given to each club member to complete throughout the week. These tasks could include brainstorming, branding, etc.

Gaining Marketing Experience

The Marketing Club was created to provide students with the necessary resources to gain experience in the Marketing field. These projects include Re-branding for Lake Superior State University, Social media projects for different professors, Creating mock logos, creating mission statements for further understanding, Interview practice, Working on different fundraising events, and recruiting practices by getting new members for the club.

Social Media Usage

The Marketing Club could use different social media platforms to advertise for the club. They could use Facebook for advertising for the fundraisers, posting interesting Marketing/Business articles. The LSSU Facebook page could share posts about the fundraisers for further advertisement.

The Marketing Club could use Instagram to advertise for the fundraisers and to post student activity photos. They could post photos of the meetings and new members.

Advertising

A few options for advertising include printing posters to hang in the resident halls and class buildings on campus. The posters will include club information and social media tags for students and Administration to follow the web pages.

Advertising on Social Media. This will provide a clear understanding of what the marketing club does and how it is benefitting LSSU. The social media platforms will state where the club wants to go in the future and what kind of projects they would like to do.

Success Factors

We need full support from all the members of the club and 100% involvement for the projects to be successful.



What? Marketing Club
Where? Considine Hall
When? Monday @ 6pm

"Inspire, Create, & Collaborate"

Fundraising Events

Water Pong Tournament - Fall 2017

Materials

Cups, Water, Ping-pong balls, tables, food and beverages.

Poster Design



Location

Peacock Cove, Walker Cisler Center

Advertising

Hanging posters, Online advertising through social media, and word of mouth.

Target Market

Our main target for the water pong tournament is college students, specifically ones who are living on campus.

Budget

The budget for the water pong tournament will be very low as all we will need is cups, ping pong balls, food and drinks, and a gift card valued at \$25.

Teams

Teams for the water pong tournament will consist of two teammates per team. Teams for the softball tournament will consist of a minimum of 10.

Prizes

\$25 gift card. Ex. Applebees, Subway, Taco Bell, VISA, etc.

Cost

The cost for the water pong tournament will be \$10 per team. This is a cheap and low cost tournament that will get a lot of students involved.

Atmosphere

There will be music to help keep the atmosphere fun.

WATER - PONG TOURNAMENT



Softball Tournament - Spring 2018

Materials

Bases, bats, gloves, food and beverages, fields, and tables

Poster Design



Location

City softball fields located on Meridian Street, Sault Ste. Marie, MI

Advertising

The softball tournament will target anyone 18 or older. This will allow for the community to get involved and may create opportunities for the club to be more active in the community. Our main way of advertising for the softball tournament is through word of mouth, social media, and flyers.

Budget

The budget for the softball tournament will consist of \$75 for field rentals, \$50 for food and beverages, and the equipment, which includes bases, bats, and gloves, will be free to rent through the school.

Teams

Teams will consist of a minimum of ten players and there is not a maximum.

Prizes

Winning team will win a cash prize of \$250.

Cost

The cost will be \$15 per player.

Atmosphere

This tournament will take place in the middle of winter adding a twist to the games. There will be food, beverages, and music to help keep the atmosphere fun.



1st Annual Snowball Tournament

Come join us for a fun filled day of slow-pitch softball in the extreme weather!

When: March 25th, 2018

Where: City softball fields located on Meridian Street, Sault Ste. Marie, MI

Cost: \$15 per player

Winner will receive a first place trophy and cash prize of \$250!

All funds raised from this tournament will be donated to Lake Superior State University Marketing Club. The Marketing Club is newly founded and is looking to raise money to help attend business conferences to expand their knowledge in the business world.

Registration form is on Facebook @snowbaltournament or email us at snowballtourney@gmail.com with any questions!

Contingency Plan

Our second recommendation for the club would be to focus on funding inside of the school. They could talk to the President's Council and Student Government to inquire about student club funding. This could be beneficial to the club if they did not receive enough funding from the fundraisers.

The Marketing Club could do this by scheduling meetings with these Councils and presenting to them why they need funds and how these funds would benefit the students. This is our contingency plan because it would be great if the club could raise the funds on their own.

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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Student work: Event Planning <ul style="list-style-type: none"> • “The Triple C Event” • “Chippewa County Family Project Benefit” • “RibFest”
This documentation is relevant to Question number: Intellectual Inquiry (CC 3.b) #4	Intellectual Inquiry (CC 3B) #4
Briefly summarize the content of the file and its value as evidence supporting program review:	Team projects in MRKT 379 (Sports and Events Marketing) showing mastery of creative work

JOIN US IN SUPPORT OF CHIPPEWA
COMMUNITIES THAT CARE

TRIPLE 'C' FESTIVAL

Chili, Cornhole, Community Games

\$5 ADULT
FEE

\$3 CHILD
FEE

LAKE ONTARIO, CISLER CENTER
LAKE SUPERIOR STATE UNIVERSITY
10 NOVEMBER 2018, 2PM - 5 PM

RAFFLE PRIZES!





Lake Superior State University

RibFest 2017

April, 8th 2017 @ Legion



Fellow Ribbers,

On April 8th, 2017 Lake Superior State University will be hosting its 4th annual Ribfest event for the local Wounded Warrior Foundation. Gates open at 2 PM, we want to invite everyone to come down to the Legion to enjoy mouth-watering ribs, live music, and many prizes. The cost will be \$10 to get in, which gives you access to all the teams ribs, raffle prizes, and additional food vendors & sweet treats. All proceeds from the event will go towards the **Wounded Warrior Foundation**.

- DOOR PRIZES - LIVE MUSIC - SMOOTHIES - ALL YOU CAN EAT

- *Each team is sponsored with 6 racks of ribs but should purchase additional ribs as well.
- *Each team must provide their own BBQ or slow roasters.

If you are interested in making a team for the event please contact:

- [REDACTED] or 716-[REDACTED]
- [REDACTED] [i.edu](#) or 906-[REDACTED]

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Student work: Blueprinting and Servicescape Recommendation for A Service Business
This documentation is relevant to Question number: Intellectual Inquiry (CC 3.b) #4	Intellectual Inquiry (CC 3B) #4
Briefly summarize the content of the file and its value as evidence supporting program review:	Team project in Services Marketing (MRKT 385) showing ability to collect, analyze, and communicate information

Zorba's Greek American Restaurant

MRKT 385: Services Marketing

Professor Valerie Philips

August 5th, 2018

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Introduction

For the final project, we have decided to highlight Zorba's Greek American Restaurant. Zorba's is a small family-run business serving downtown Sault Ste. Marie for over 50 years. The owners of this business are very open to providing us with the information we need to create the service blueprint, as Jenna is an employee at Zorba's.

Service blueprints help map customer, employee, and service system interactions. They are able to showcase the key actions and interactions made by customers and employees. Most service blueprints showcase the front stage activities, backstage activities, potential failure points, and service standards. These all help a business detect the potential flaws within their system.

Service Blueprint

	Service	Cooking the Food	End of the meal
Physical Evidence or Communication Channels	Formal <ul style="list-style-type: none"> - Greeting - Small talk 	Informal <ul style="list-style-type: none"> - Coworkers relaying information 	Formal <ul style="list-style-type: none"> - Asking about the customer's experience
Customer Actions	<ul style="list-style-type: none"> - Talking to server and tell them what they want to eat - Asking for whatever else they needed 	<ul style="list-style-type: none"> - Servers hang the ticket with the order - Cooks communicate with each other and determine who cooks what 	<ul style="list-style-type: none"> - Paying their bill - How their food and overall experience was
Front-line Staff Actions	<ul style="list-style-type: none"> - Taking the tables order - Serving their food/drinks 	<ul style="list-style-type: none"> - Cooking the food to order - Making sure they are following the ticket 	<ul style="list-style-type: none"> - Ringing up their bill - Cashing them out - Asking them how their food was
Behind-the-Scenes Staff Actions	<ul style="list-style-type: none"> - Putting the order in with the kitchen - Make sure it is what they want 	<ul style="list-style-type: none"> - Making sure their food is prepped and stocked before lunch and dinner - Checking inventory and putting in the order that is placed every other day 	<ul style="list-style-type: none"> - Going back into the credit card machine and adjusting the total after leaving a tip -

Remarks

In general, Zorba's runs like a typical restaurant. The servers are responsible for making all contact with the customers, and the cooks are responsible for putting out the best product possible. Two notable things about Zorba's and how they differ from other restaurants is that there are not hostesses or bussers staffed at this restaurant. This means that the waitresses are responsible for seating customers and cleaning up the tables. In general, this creates a much more personalized experience, and also cuts down overhead costs. The customer is able to interact with their server more, which can certainly cause the customer to feel more connected to the employees. This certainly adds to the service quality, as customers feel more connected and comfortable. In the case that the restaurant is extremely busy, this can lead to productivity issues. If servers have to spend their time bussing tables, then they might not be able to bring their food out as fast as they would like to; however, Zorba's is a large enough location that this usually does not have a major effect on productivity.

Line of visibility is the key aspect that separates what customers experience from the front of the stage activities to the back of the stage activities. Zorba's is able to do this by implementing the procedures they have in place. For example, chefs must stay in the kitchen. This helps the customer clearly differentiate their servers from the cooks. Furthermore, the other procedures in place include that inventory and refilling stock must all happen in the kitchen. This allows the customers to not see what is required of the servers in order to keep the customer happy. This prevents the customer from feeling uncomfortable as if they were in the way of the server completing their job.

Support processes and supplies are very important in the restaurant industry. Without the proper supplies, the customers would not have the same experience. For

example, if the restaurant ran out of napkins, then the customers would feel very uncomfortable eating. Another example is when a restaurant runs out of a particular food item. This gives the customer a less pleasant experience because they would not be able to eat what they originally wanted. However, Zorba's does a great job of having plenty of processes and supplies. This helps give the customer an overall pleasant experience.

Overall, in the restaurant industry, customers have pretty set standards. They expect to be treated nicely, not wait too long for their food or drinks, and to have an overall pleasant experience. Zorba's is able to meet all of these industry standards within their normal operating procedures.

Strengths & Weaknesses

Throughout the fifty years that Zorba's has been in business, they certainly have managed to increase their strengths and eliminate their weaknesses. One of the major strengths that Zorba's portrays are the specific duties required for each position. For the servers and cooks, they understand what is expected of them during their shift. Some of these examples include what they are required to restock and inventory, and what they are required to do when customers are at their tables. This eliminates the confusion over whose task it belongs to. One of the weaknesses that can interfere with the length of stay is the size of the kitchen. The kitchen inside Zorba's is very small, and this can cause a delay in customers getting their food if the restaurant is packed. This weakness is a potential failure point for the restaurant because customers do not like to wait a long time for their food, and this can lead to unhappy customers.

Firm's Approach

Zorba's has a very typical approach to the daily operations of a restaurant. Two of the major differences of Zorba's compared to other restaurants are the lack of hostesses and bussers (described above) and the fact that all payments are taken care of at the front of the restaurant. In this case, the customers have to go up and pay for their meals instead of the servers taking their payment up for them. In many cases, this can actually lead to customers staying in the restaurant for shorter periods of time, and therefore allowing for more turnover of seats, which can create more revenue.

Mystery Shopper Experiences

1. Call in order

One of the three "mystery shopping" experiences with Zorba's included calling in an order for carryout. The server that answered the phone was very helpful in answering all of the questions that were asked of her. She also made reviewed the order which was helpful. Two of the things that I noticed were that she did not give the total nor the time that it would take to complete the order. While these are two very small things, they can sometimes be important in the case of carryouts. For example, if a boss had to send his assistant to pick up his lunch, the assistant would not know how much money to bring or when to leave to pick up the order. Overall though, this was a positive experience.

2. Website

When researching Zorba's menu online, it was noted that Zorba's does not actually have a website. This can be very troublesome for business owners as they cannot control what information is posted online about their business. Furthermore, it was hard to get accurate information about the menu.

3. Dine in experience

The dine in experience was certainly terrific. The server was fast and efficient bringing out drinks and answering all questions. The kitchen was efficient in pushing out excellent food. Finally, the owners even greeted the table, which made the experience even more pleasant. There were no noticeable weaknesses during the dine in experience.

Recommendations

As we noticed this restaurant is run typically pretty well, we found some things that could be improved. I think the kitchen could be improved, as we watched the cooks working in tight quarters, that it seems that there is room for frustration which may result in error while cooking. If they created a bigger space for the cooks to work, there may be a reduction in wait time.

Another recommendation we had was the overall layout; if the front of the had bigger windows where people could look in from the outside, I think people would be more interested and want to come in. If you walk by a restaurant and you can see that it's busy, you're more likely to want to try the food, after all it's busy for a reason.

Lastly, outdoor seating would be another recommendation we had in mind. As majority of the customers (in the summer) are tourists, they would enjoy sitting outside while enjoying the delicious food from Zorba's and it would attract a bigger crowd as well.

Penny's Kitchen



MRKT 385

Prof. V. Phillips

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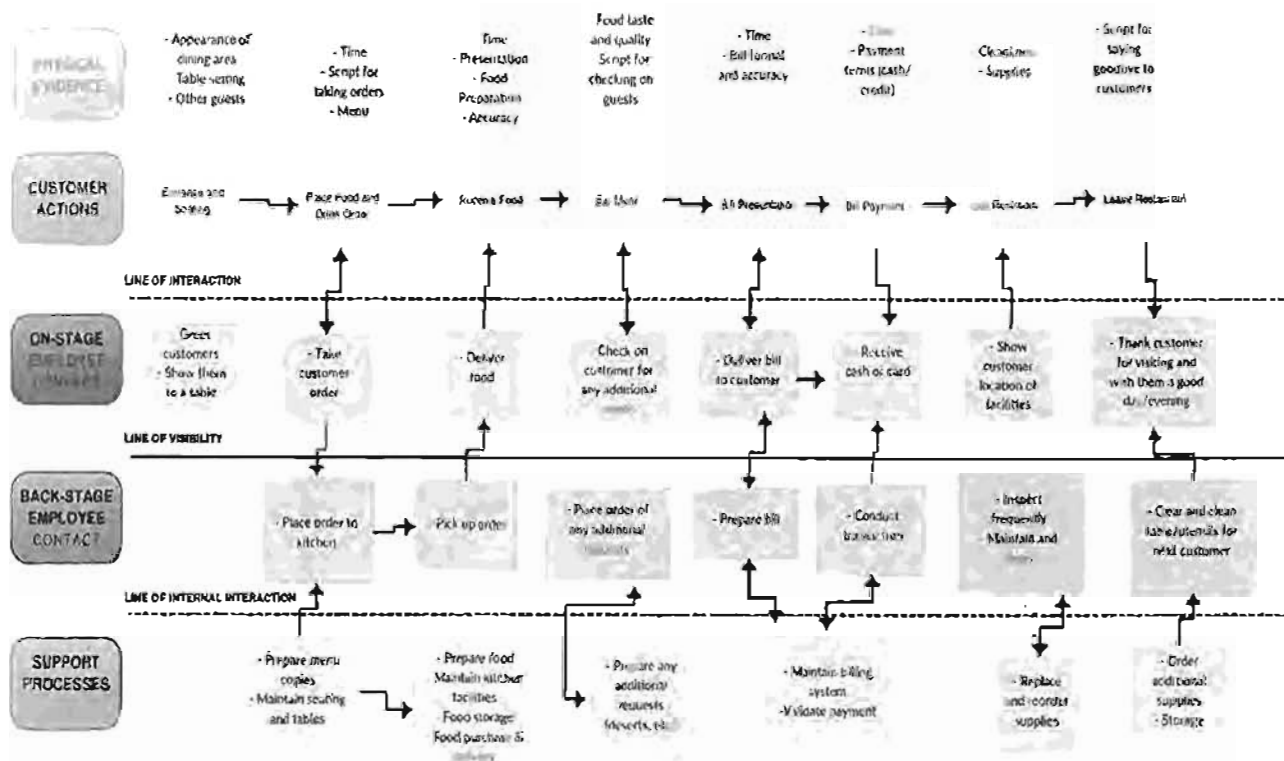
- Overview
- Service Blueprint Diagram
- Frontstage Activities
- Backstage Activities
- Marketing Approach
- Recommendations for Redesign

Overview

Penny's Kitchen in Downtown Sault Sainte Marie is a homegrown cafe style restaurant that provides a unique and wholesome dining experience that sets them apart from others in the area. Whether you order in or take out you get a carefully thought out product that is the result of tried and true processes and years of experience. Penny Stutnuer started the restaurant nearly thirty years ago after noting a lack of creativity with the food options available in the downtown area. Motivated to offer a fresh and organic take on classic favorites she opened her store in the early 90's.

Initially the deli portion was only half of the servicescape, lending the other half to culinary retail, but after a fire and the introduction of big box retail stores she opted out of that line of business to focus solely on food service. From the start, Penny's innovated to maintain competitive. Over the years they have offered many supplementary services such as; instructional courses about various aspects of cooking and baking, assorted gift baskets, catering and delivery, among others. The menu is very diverse maintaining a focus on breakfast and lunch options, and uses fresh and organic locally sourced ingredients

Service Blueprint Diagram



create

Front Stage Activities

The front stage activities are of equal importance on the impact they have on the consumer. The front of house employees are responsible for all front stage activities. First and most importantly is consumer interaction, they have to maintain a rapport with all the customers that is responsible for how they view the restaurant. If they offend or upset a customer not only are they unlikely to return, but the reputation will be tarnished. Inversely, positive encounters will encourage return visits and repeat business. This interaction involves many steps including; taking the order, assisting with any questions or concerns, exchanging money, delivering the

order, and following up with the guest,. The front stage workers are responsible for the cleanliness of the store in all aspects; bussing tables, sweeping and mopping, cleaning bathrooms, spills, etc. Additionally they must maintain inventory of the display cases, roll silverware, make coffee, and ensure inventories of napkins and to-go containers are maintained, tender change, empty waste bins. At pennies kitchen the front stage workers are also baristas, or coffee specialists, so they are trained on how to make an assortment of coffee drinks as well as shakes. After the stores closes every day, the front stage workers clean all surfaces and mop the floors. Additionally, there is a managerial front stage worker that is responsible for hiring new workers and maintaining inventory of the supplies, and has a few other duties when necessary. Smooth operations of the front stage activities are vital because as soon as the consumer sees a failure on the staff part it affects their opinions of business as a whole.

Backstage Activities

The backstage activities, like the name suggests, happen behind the scenes and are not as apparent to the consumer, but are equally, if not more important than the front-stage. If you visit a restaurant, no matter how nice, if the food is bad then you are unlikely to return. These activities include much of what you think about when it comes to a kitchen, but also much more. Of great importance to any restaurant is food preparation, and of even greater importance is food safety. For every dish ingredients must be chopped or sliced, portioned, and seasoned all done to Penny's specifications. Many dishes, such as soups, are prepared in advance and kept in store for later use. However most dishes are prepared on the spot using pre portioned ingredients as

maximize profit and eliminate waste. This also requires a great deal of skill for identifying the “doneness” and quality of a dish, and being able to cook many different items at once. This is also part of the cook’s job, knowing what to cook and when, you don’t want to be preparing something for later use amidst a lunch rush, rather in between peak business hours. While preparing ingredients part of the protocol governing food safety is to label every item for what it is and when it was prepared.

Additional back stage activities not delegated to the employees include administrative duties. These are handled by the owners and include scheduling, payroll, taxes, insurance, inventory, daily records, among many other seemingly simple activities. While none of these duties seem complex, maintaining them is a necessity for legal and organizational reasons. Making a schedule for anywhere from 10 to 20 employees is a major complexity and is constantly a hassle when employees need to call in sick or make time for vacations and etc. Maintaining records for payroll and taxes are legal obligations for any business and require hours of work and records must be kept to prove sales and for tax purposes. Taxes are one of the only things at Penny’s that is subcontracted out because of the nature of the task, it is simply easier and cheaper to have someone else do this. Insurance is the standard general liability insurance for a restaurant. This covers property liability, food contamination, workers compensation, and life insurance. Automobile liability is covered but general employees are not covered in this situation, so deliveries are restricted to those who are considered to own the restaurant, which in this case is limited to family members. Daily sales records are maintained for organizational

purposes to keep benchmarks of how business is going. Other administrative duties include maintaining licenses for; food service, certificate of occupancy, sign permits, and in this case a beer and wine license.

Marketing Approach

The marketing for pennies kitchen is a relatively simple approach. Prime real estate is one of their most valuable assets. Being located right downtown across from the hospital and in reasonable distance from many businesses make it a very popular lunch destination. A website is available that gives a brief description of what is offered on the menu, hours, location, and contact information. Additionally the menu that is offered at the restaurant can be taken home or the workplace to be posted on the fridge or bulletin board and is there to remind you every time you get hungry. As far as social media Pennies offer accounts for Pinterest, Facebook, and Google Plus. Word of mouth advertising is definitely an invaluable asset, it is a very popular spot with the retired and elderly community, as well as the after church crowd, and many groups gather with the "let's grab lunch" motto. When asked about competition, the owners stated that they didn't feel that they had any. While there are other lunch spots out there, they felt that people came to Penny's because they knew what they offered and could expect, and that they don't expect people to come in day in and day out.

Recommendations for Redesign

It is difficult to recommend things to improve at Penny's. When you enter as a patron, everything appears clean and orderly, they have interesting art on the walls, it's well-lit and the staff is friendly, the food is good and overall it is a very comfortable experience. We played the role of mystery shoppers a number of times and each time the service was great, the food was delivered timely and was very satisfactory, and overall the experience was one that would be welcomed again. A stronger social media presence definitely could be recommended, daily or even weekly posts to Instagram and Facebook would undoubtedly raise their presence locally, especially with the youth and college age demographic. Also revamping their coffee options to relate more the surging coffee trend could help broaden their consumer base. Overall, Penny's kitchen is thriving and the owner even stated that too much more business and they'd have to start turning people away.

PART 2: Degree-Level Review

Degree Program: Bachelor of Science – Finance and Economics

Explain how the program works to address each of the following questions. For each question, respond with a narrative and supporting evidence.

Assessment (CC 4.B and CC 4.C)

13. Provide evidence that the degree-level program outcomes are clearly stated and are effectively assessed, including the "use of results." Attach the 4-Column Program Assessment Report.

A report is attached that details the assessment criteria, assessment results and use of results for the Finance and Economics program's student learning outcomes for the 2016/2017 and 2017/2018 academic years.

14. Explain how results from degree assessments were used to improve the degree program. Include specific examples.

Students struggle with the concept of the Weighted Average Cost of Capital (WACC). Students now practice using the formula and learning what data they need to input into the formula. Most recently 95% of students wrote the correct formula and over half correctly estimated the WACC. Similarly, students learn to use financial ratios to assess the financial strength of companies. In the case of FedEx and UPS students grappled with which company was better positioned as UPS has a much stronger balance sheet yet FedEx is growing faster.

Quality, Resources and Support (CC 3.A)

15. Explain how the program ensures that degree program-level and course-level learning outcomes are at an appropriate level. Attach evidence, including a degree audit for the program.

See attached Degree Qualification Program document.

Intellectual Inquiry (CC 3.B)

16. Explain what the program does to engage students in collecting, analyzing, and communicating information; mastering modes of inquiry or creative work; developing skills integral to the degree program. Attach examples of undergraduate research, projects, and creative work.

See Section 3 of the attached Degree Qualification Program document. Evidence of student accomplishment is not available because all work was handed back to the students with comments. Electronic copies of assignments will be requested and retained going forward.

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Assessment Report
This documentation is relevant to Question number:	Part 2 – Finance and Economics Question #13
Briefly summarize the content of the file and its value as evidence supporting program review:	The report provides evidence that the program outcomes are clearly stated and effectively assessed.

Assessment: Program Four Column

Program (CoS) - Finance and Economics BS

Assessment Contact: Prof. Gerald Root

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>Analytical Skills - Graduates will possess analytical skills. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) (Bloom)</p>	<p>Direct - Capstone Project - including undergraduate research - Business plan completed in capstone course, BUSN466 (Business Policy) Criteria Target: 80% of Finance and Economics majors will score 80% or higher in the economics and finance section</p>	<p>Finding Reporting Year: 2016-2017 Goal met: Yes Fall 2016 - No Finance and Economics students took BUSN466 this semester Spring 2017 - 100% (08/13/2018)</p>	<p>Use of Result: Because the goal was met during the reporting period, no actions will be taken based on these results. Qualitative feedback received from students indicates Finance and Economics majors identify lack of practical experience as a weakness. Faculty believe the students could gain knowledge and experience through the use of a Bloomberg terminal. They are working on obtaining the funding to provide this tool to LSB students. (08/13/2018)</p>
		<p>Finding Reporting Year: 2017-2018 Goal met: Yes Fall 2017 - 100% Spring 2018 - 67% (08/13/2018)</p>	<p>Use of Result: Only two students scored below 80% during the spring 2018 semester. Eight out of ten (80%) students scored 80% of higher during the reporting year. Qualitative feedback received from students indicates Finance and Economics majors identify Excel skills as a weakness. LSB faculty have incorporated Excel examples and assignments into various courses and are working</p>

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
	Other Findings	market return for the Market Risk Premium (08/24/2017)	Risk Premium. (08/24/2017)
Financial Statement Analysis - memorize key financial ratios; know how to apply them and their limitations. Goal Status: Active	Other Findings	Finding Reporting Year: 2016-2017 Goal met: No One half (7/14) of the Finance majors knew the Dupont Formula (08/25/2017)	Use of Result: Review the financial ratios more thoroughly. (08/25/2017)
		Finding Reporting Year: 2016-2017 Goal met: No 5 out of 14 finance majors knew the formula for Free Cash Flow (08/24/2017)	Use of Result: spend more time reviewing FCF (08/24/2017)
		Direct - Exam/Quiz - within the course - An essay question asking students to use the DuPont formula to explain differences in ROE between two companies Criteria Target: 80% of students will earn at least 50% credit High Impact Program Practices 1: Writing-Intensive Course(s)	Finding Reporting Year: 2017-2018 Goal met: Yes Students scored 105 points out of 190. Only 2 students scored below 50% (11/09/2018)
Terminal Value - Students will be able to list two methods used to estimate Terminal Value and explain why it's important. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Low-Level (Understanding/Remembering) (Bloom) Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem.	Direct - Exam/Quiz - within the course - Students in Finance 446 will have an essay question on their final exam which asks them to list two methods used to estimate Terminal Value and explain it's importance. Criteria Target: 70% of students will score above 70% or higher High Impact Program Practices 1: Capstone Course(s), Projects High Impact Program Practices 2: Capstone Course(s), Projects	Finding Reporting Year: 2017-2018 Goal met: Yes students scored 165 total points out of a possible 190 points. 16 of 19 students scored the maximum ten points. (08/23/2018)	Use of Result: since the goal was met, test again in two years. (08/23/2018)
		Finding Reporting Year: 2016-2017 Goal met: Yes 78% correctly identified both methods (08/23/2018)	Use of Result: since the result was met, test again in two years (08/23/2018)
Derivatives - understand how to hedge using options, forward	Other Findings	Finding Reporting Year: 2016-2017 Goal met: No	Use of Result: Take more time explaining derivatives.

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem.</p> <p>Business Knowledge - Graduates will demonstrate knowledge of business-core subjects. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Level 2 (Skills and Concepts) (Webb) Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem.</p>	<p>Direct - Exam/Quiz - Standardized - ETS Major Field Test in Business administered to graduating seniors in BUSN466 (Business Policy) Criteria Target: The Lukenda School of Business mean percent correct will equal or exceed the national mean in each assessment indicator area.</p>	<p>Finding Reporting Year: 2016-2017 Goal met: No Fall 2016: The LSB met its goal in each assessment indicator area. Spring 2017: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas. (08/30/2018)</p>	<p>Use of Result: Significant improvement has been made in the Quantitative Analysis and Information Systems sections since a management professor with a strong quantitative background was hired and courses in information systems and analytics were added to the common professional component of all business bachelor degrees. Goals in these sections were met during the 2016 and 2017 fall semesters. The LSB mean was only slightly below the national mean during the 2017 spring semester. (08/30/2018)</p>
		<p>Finding Reporting Year: 2017-2018 Goal met: No Fall 2017: The LSB met its goal in each assessment indicator area. Spring 2018: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas. (08/30/2018)</p>	<p>Use of Result: The LSB faculty member who teaches MGMT280 (Intro to Management Information Systems) and MGMT371 (Operations & Business Analytics) continues to make adjustments to teaching methods and assignments to deepen students' understanding of difficult concepts covered in these courses. Beginning fall 2018, the professor will implement quizzes to encourage students to read the textbook, assign graded homework, require an online subscription to study material and</p>

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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Degree Audit
This documentation is relevant to Question number:	Part 2 – Finance and Economics Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The degree audit lists the program's requirements in terms of courses, credits, residency and GPA.

Sept. 2013

School of Business

B.S. in Finance and Economics Degree

Name _____

S.I.D. _____

Intended month/year of graduation _____ / _____

Advisor Approval _____

Degree Requirements

(minimum 81 credits)

Common Professional (48 credit)

ACTG132 4 _____
 ACTG133 4 _____
 BUSN121 3 _____
 BUSN211 3 _____
 BUSN231 3 _____
 BUSN350 3 _____
 BUSN403 3 _____
 BUSN 466 3 _____
 ECON201 3 _____
 ECON202 3 _____
 FINC341 4 _____
 MGMT280 3 _____
 MGMT360 3 _____
 MGMT371 3 _____
 MRKT281 3 _____

Major Requirements (min. 33 credits)

MATH111 3 _____
 MATH112 4 _____
 ** 3 _____
 ** 3 _____

**Two courses from this group must be completed for the Econ and/or Finance Major, FINC443, FINC446, FINC448

Finance Option (18 credits)

FINC400 level elective 4 _____
 Finance, Economics, or Accounting electives (14 credits)*

Economics Option (18 credits)

ECON407 3 _____
 ECON300-400 Electives (9 credits)

ECON, FINC or MATH electives (6 credits)

General Education Requirements

(minimum 35 credits)

Communications Skills (minimum 9 credits)

ENGL110 3 _____
 ENGL111 3 _____
 COMM101 3 _____

Mathematics (minimum 3 credits)

MATH111 3 _____

Aesthetics (minimum 7 credits)

HUMN251 4 _____
 3-4 _____

Cultural Diversity (minimum 3 credits)

3 _____

Social Science (minimum 6 credits)

ECON201 3 _____

Natural Science (with lab) (minimum 7 credits)

4 _____
 4 _____

Courses are also required as part of the Common Professional Component.

_____ **At least 124 credits***
 _____ Residency - 30 hours
 _____ 2.0 GPA
 _____ 2.0 GPA in departmental requirements

I certify that all departmental requirements are complete and the departmental grade point average is 2.0 or higher.

 Department Head School of Business

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Degree Qualification Program
This documentation is relevant to Question number:	Part 2 – Finance and Economics Questions #15 & #16
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides evidence that the program’s learning outcomes are at an appropriate level and provides examples of the challenging assignments students complete.

Degree Qualification Program: Finance and Economics

1. Specialized knowledge

At the LSB our Finance/Economics majors take a course in Financial Policy. The student uses the case method to engage with best practices and procedures to solve actual or hypothetical financial problems. The student integrates quantitative data and basic financial understanding to propose solutions.

Before even beginning to discuss cases students discuss the need for ethics in evaluating any business problem. The CFA Code of Conduct is a reference and guide.

After a brief introduction the student is encouraged to think about the economic (not book) value of a firm, together the students move on to cases designed to demonstrate the use of:

- the cost of capital, capital budgeting, and resource allocation.
- debt, and management of the capital structure.
- dividends and share buybacks.
- Working capital management.
- Terminal value and Initial Public Offerings.
- Acquisitions and buyouts.

2. Broad and Integrative Knowledge

All Finance/Economics majors take two integrative courses. One described above is a case method course. In the other students prepare a business plan using all the skills they have developed during their undergraduate years in all the major disciplines. Moreover, all LSB students take a course in Business, Government, and Society in which they study ethics, business interactions with activists, government agencies, and international organizations. The students read the Wall Street Journal and two popular books written by professors or business executives in addition to the textbook. Among the topics students learn are:

- utilitarianism.
- Rawls theory of Justice.
- Emanuel Kant, and the Categorical Imperative.
- the media.
- government regulation.
- antitrust.
- global climate change.
- the financial crisis and.
- globalization and trade.

3. Intellectual skills

Analytical inquiry: Students preparing cases apply knowledge from other business and non-business disciplines, especially microeconomics. Working in business, requires team members to consider the needs and ambitions of the other team members. The case method simulates the business environment and encourages students to engage in the process of integrating many fields of inquiry to lead and solve problems.

PART 2: Degree-Level Review

Degree Program: Associate – Small Business Administration

Explain how the program works to address each of the following questions. For each question, respond with a narrative and supporting evidence.

Assessment (CC 4.B and CC 4.C)

13. Provide evidence that the degree-level program outcomes are clearly stated and are effectively assessed, including the “use of results.” Attach the 4-Column Program Assessment Report.

A report is attached that details the assessment criteria, results and use of results for the Small Business Administration program’s student learning outcomes for the 2016-2017 and 2017-2018 academic years.

14. Explain how results from degree assessments were used to improve the degree program. Include specific examples.

Enrollment in LSB’s associate degree programs is minimal. However, LSB faculty and staff have determined it is cost effective to continue offering the programs. All required courses for the two associate degrees are also required courses for LSB bachelor degrees. In addition, most students who earn a business associate degree continue in the LSB to earn a bachelor degree. Enrollment in the Small Business Administration program for the reporting period is summarized below.

Academic Year	Students with Small Business Administration as First Major	Students with Small Business Administration as Second Major	Total Enrollment
2016-2017	5	6	11
2017-2018	3	12	15

Source: <https://www.lssu.edu/institutional-research/interactive-reporting/#toggle-id-3>

The attached assessment report provides examples of changes made at the course level to improve student learning. One major determination LSB faculty made through review of the program’s assessment results is that performance data needs to be separated by student major program going forward as enrollment in many business courses is comprised of both associate and bachelor students.

LSB faculty and staff are reluctant to draw conclusions based solely on the performance of such a small number of students. Thus, other data, such as Major Field Test (MFT) results, is considered as well. The LSB administers the MFT every semester to senior students enrolled in the bachelor degree capstone course, Business Policy (BUSN466). Students are tested in nine business areas, and their scores are compared with those of thousands of students across the nation. LSB faculty and staff use the results to determine how well students demonstrate knowledge of core business subjects after completing the common professional component of their degrees. Although associate-level students do not take the MFT, they are required to take many of the courses that comprise the common professional component of the bachelor degrees. A document is attached that summarizes MFT results for the reporting period and describes related changes made to business courses.

Intellectual Inquiry (CC 3.B).

16. Explain what the program does to engage students in collecting, analyzing, and communicating information; mastering modes of inquiry or creative work; developing skills integral to the degree program. Attach examples of undergraduate research, projects, and creative work.

LSB professors bring their professional experience into the classroom and focus on practical application through problem-based learning, case analysis and simulations. Examples of innovative methods used to engage and challenge Small Business Administration students are provided below. A document is attached that provides more detail on these comprehensive course assignments.

- Students complete two major projects in BUSN231 (Business Communications). One is a semester-long project that culminates in the development of an individual portfolio. The other is a group assignment that requires students to work together to write a convincing report that diagnoses the issues that are causing problems for an organization.
- In MRKT389 (Entrepreneurship), students create and present a business plan. This major project requires students to develop a business idea, determine sustainability based on market size and create an implementation plan to get the business operational.
- In MGMT360 (Management Concepts and Applications), students complete a major group project that requires production and presentation of a project plan. Students also individually develop a class activities portfolio.
- In MGT280 (Introduction to Management Information Systems), students complete a research paper on a business technology topic.
- Students have the opportunity to participate in various LSSU student organizations that allow them to further explore the business world including the Accounting Club, the Investment Club and Enactus.

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Assessment Report
This documentation is relevant to Question number:	Part 2 – Small Business Administration Question #13
Briefly summarize the content of the file and its value as evidence supporting program review:	The report provides evidence that the program's outcomes are clearly stated and effectively assessed.

Assessment: Program Four Column

Program (CoS) - Small Business Administration AA

Assessment Contact: Prof. Marta Diaz

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>Management Functions - Graduates will be able to describe the functions of management and apply them appropriately in the workplace. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-Level (Analyzing/Applying) [Bloom] Institutional Learning: ILO4 - Professional Responsibility - Students will demonstrate the ability to apply professional ethics and intercultural competence when answering a question, solving a problem, or achieving a goal.</p>	<p>Direct - Group project, collaborative learning - Major Project group assignment completed in MGMT360 (Management Concepts & Applications) Criteria Target: 75% of students will score 75% or higher on the project High Impact Program Practices 1: Collaborative Assignments, Projects</p>	<p>Finding Reporting Year: 2016-2017 Goal met: No Fall 2016 - 9% of students scored 75% or higher (average score = 63%) Spring 2017 - 10% of students scored 75% or higher (average score = 66%) (08/29/2018)</p>	<p>Use of Result: This major group project was implemented during the fall 2016 semester. The instructor concluded many students did not understand the importance of all team members contributing equally throughout the project and how participation affected their grade. The instructor tried to communicate this more clearly during the spring 2017 semester. Because the results only improved slightly, the instructor will implement a peer evaluation component to the project going forward. (08/29/2018)</p>
		<p>Finding Reporting Year: 2017-2018 Goal met: No Fall 2017 - 43% of students scored 75% or higher (average score = 70%) Spring 2018 - 44% of students scored 75% or higher (average score = 66%) (08/29/2018)</p>	<p>Use of Result: Going forward, the instructor is going to allow students to apply a new concept to their projects during class time after it has been introduced and discussed. The instructor will provide feedback on their work and encourage students to contribute equally during this time. (08/29/2018)</p>

Program Outcomes	Assessment Criteria & Procedures	Assessment Results	Use of Results
<p>Communication - Graduates will be able to demonstrate oral and written communication skills appropriate for a business environment.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Goal Level (Bloom/Webb): Level 2 (Skills and Concepts) (Webb)</p> <p>Institutional Learning: ILO1 - Formal Communication - Students will develop and clearly express complex ideas in written and oral presentations.</p>	<p>Direct - Writing Intensive Assignment - Individual Portfolio semester-long project completed in BUSN231 (Business Communications)</p> <p>Criteria Target: 75% of students will score 75% or higher</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: No</p> <p>56% of students scored 75% or higher (08/29/2018)</p>	<p>Use of Result: This project was implemented during the spring 2017 semester. All students failed during their first attempt. The instructor provided feedback and allowed students to resubmit their projects. However, many students still did not meet the instructor's expectations and the target was not met. Going forward, the instructor will provide more examples of the type and quality of work that should be included in the portfolios. (08/29/2018)</p>
		<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: No</p> <p>Fall 2017 - 54% of students scored 75% or higher</p> <p>Spring 2018 - 95% of students scored 75% or higher (72% for the year) (08/29/2018)</p>	<p>Use of Result: After many of the students did not meet the instructor's expectations during the fall semester, the instructor provided more coaching to individual students and implemented peer review. The results significantly improved during the spring 2018 semester. The instructor provided bonus points during this semester but concluded this practice is not necessary and will discontinue this going forward. These results are based on every student who took BUSN231 during the academic year. Going forward, results will be separated and analyzed by student major program. (08/29/2018)</p>
<p>Technology - Graduates will be able to effectively utilize technology within the functional areas of</p>	<p>Direct - Laboratory, Clinical, Skill/Competency Assessments - Computer lab sessions with Excel</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: Yes</p> <p>83% of students successfully completed the lab sessions</p>	<p>Use of Result: No corrective action will be taken currently since the goal was met.</p>

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
business. Goal Status: Active Goal Category: Student Learning Goal Level (Bloom/Webb): Mid-level (Analyzing/Applying) [Bloom]	and Access completed in MGMT 280 (Introduction to Management Information Systems) Criteria Target: 85% of the students will obtain 75% or above	{08/29/2018} Finding Reporting Year: 2017-2018 Goal met: Yes 100% of students successfully completed the lab sessions {08/29/2018}	{08/29/2018} Use of Result: Going forward, data will be separated and analyzed based on student major program. {08/29/2018}

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Major Field Test Results
This documentation is relevant to Question number:	Part 2 – Small Business Administration Question #14
Briefly summarize the content of the file and its value as evidence supporting program review:	The document describes changes that were made to the program based on Major Field Test results.

Use this table to supply data for Criterion 4.2. (Figure 4.2 In self-study)

Performance Indicator	Definition
1. Student Learning Results	<p>A student learning outcome is one that measures a specific competency attainment. Examples of a direct assessment (evidence) of student learning attainment that might be used include: capstone performance, third-party examination, faculty-designed examination, professional performance, licensure examination). Add these to the description of the measurement instrument in column two.</p> <p>Direct - Assessing student performance by examining samples of student work</p> <p>Indirect - Assessing indicators other than student work such as getting feedback from the student or other persons who may provide relevant information.</p> <p>Formative - An assessment conducted during the student's education.</p> <p>Summative - An assessment conducted at the end of the student's education.</p> <p>Internal - An assessment instrument that was developed within the business unit.</p> <p>External - An assessment instrument that was developed outside the business unit.</p> <p>Comparative - Compare results between classes, between online and on ground classes, Between professors, between programs, between campuses, or compare to external results such as results from the U.S. Department of Education Research and Statistics, or results from a vendor providing comparable data.</p>

Performance Measure	Analysis of Results				Insert Graphs or Tables of Resulting Trends (3-5 data points preferred)
	What is your measurement instrument or process?	Current Results	Analysis of Results	Action Taken or Improvement Made	
Measurable goal What is your goal?	Do not use grades. Indicate Type of Instrument	What are your current results?	What did you learn from the results?	What did you improve or what is your next step?	

<p>Objective: Graduates will demonstrate knowledge of core business subjects.</p> <p>Target: LSB mean percent correct will equal or exceed the national mean in each assessment indicator area on the ETS Major Field Test.</p> <p>Note: The information reported here is for LSB main campus students</p>	<p>Measurement Instrument: ETS Major Field Test in Business (MFT)</p> <p>Instrument Type: Direct, Summative, External, Comparative</p> <p>The LSB uses the MFT to assess the common professional component of each of its bachelor degree programs.</p>	<p>Fall 2016: The LSB met its goal in each assessment indicator area.</p> <p>Spring 2017: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas.</p> <p>Fall 2017: The LSB met its goal in each assessment indicator area.</p> <p>Spring 2018: The LSB met its goal in 7 of the 9 assessment indicator areas. The LSB mean score was slightly below the national mean in the quantitative business analysis and information systems areas.</p>	<p>After the spring 2016 semester, the LSB closely monitored results in the Accounting and Management sections since goals were not met in those areas for the first time in recent years. LSB faculty and staff are pleased with the results achieved in both sections during the reporting period. A full-time professor, instead of an adjunct, was assigned to teach the Principles of Accounting courses. A management professor with a strong qualitative background was hired to compliment her colleagues with backgrounds in the legal and quantitative aspects of management.</p>	<p>Significant improvement has been made in the Quantitative Analysis and Information Systems sections since a management professor with a strong quantitative background was hired and courses in information systems and analytics were added to the common professional component of all business bachelor degrees. Goals in these sections were met during the 2016 and 2017 fall semesters. The LSB mean was only slightly below the national mean during the 2017 and 2018 spring semesters.</p> <p>The LSB faculty member who teaches MGMT280 and MGMT371 continues to make adjustments to teaching methods and assignments to deepen students' understanding of difficult concepts covered in these courses. Beginning fall 2018, the professor will implement quizzes to encourage students to read the textbook, assign graded homework, require an online subscription to study material and add more sophisticated Excel exercises. Also, she will begin the semester by giving a presentation on how to succeed in quantitative courses.</p>	<p>The graphs show the following trends:</p> <ul style="list-style-type: none"> Accounting: LSB Mean fluctuates around 50, National Mean is stable at 45. Economics: LSB Mean peaks at 55 in F17, National Mean is stable at 45. Management: LSB Mean is stable around 70, National Mean is stable at 65. Quantitative: LSB Mean drops from 45 in F16 to 35 in S18, National Mean is stable at 35. Finance: LSB Mean fluctuates around 50, National Mean is stable at 45. Marketing: LSB Mean peaks at 55 in S17, National Mean is stable at 50. Legal: LSB Mean fluctuates around 50, National Mean is stable at 45. Information Systems: LSB Mean fluctuates around 55, National Mean is stable at 50. International: LSB Mean fluctuates around 45, National Mean is stable at 40.
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Appendix Cover Sheet

Use a copy of this cover sheet for each document submitted. Evidence supporting the questions and narratives does *not* need to be electronically added to this Program Review form. One option is to use this cover sheet to add content to **directly this Word document**. A second option is to submit separate documents along with the form, also using this cover sheet for each document provided.

Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Degree Audit
This documentation is relevant to Question number:	Part 2 – Small Business Administration Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The degree audit lists the program's requirements in terms of courses, credits, residency and GPA.

Associate Degree in Small Business Administration

Degree Audit

Name _____

A# _____

Intended graduation month/year ____/____

Advisor Approval _____

Degree Requirements

General Education Requirements

(Minimum 24 credits)

Departmental Requirements (35 credits)

ACTG132	4	_____	_____
BUSN101	1	_____	_____
BUSN121	3	_____	_____
BUSN231	3	_____	_____
BUSN350 or		_____	_____
BUSN355	3	_____	_____
ECON202	3	_____	_____
FINC245	3	_____	_____
MGMT280	3	_____	_____
MGMT360	3	_____	_____
MGMT365	3	_____	_____
MRKT281	3	_____	_____
MRKT389	3	_____	_____

Oral & Written Communication

ENGL110	3	_____	_____
ENGL111	3	_____	_____
COMM101	3	_____	_____

Mathematics (minimum 3 credits)

_____	3	_____	_____
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12 additional Gen Ed credits are required (chosen from at least two of the following categories):

Social Science

BUSN121	3	Satisfied thru core course
ECON202	3	Satisfied thru core course

Natural Sciences

_____	3-4	_____	_____
_____	3-4	_____	_____

Humanities

_____	3-4	_____	_____
_____	3-4	_____	_____

Cultural Diversity

_____	3	_____	_____
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Electives (13 credits)

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

_____ At least 62 credits
 _____ Residency - 15 hours
 _____ 2.0 GPA

I certify that all departmental requirements are complete and the departmental grade point average is 2.0 or higher.

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Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	ACBSP Standards
This documentation is relevant to Question number:	Part 2 – Small Business Administration Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The document shows how the program requirements meet ACBSP standards.

STANDARD 6: PROCESS MANAGEMENT

In order to prepare business graduates for professional careers, the curriculum must encompass subjects dealing with the specifics of the global work place and the more general aspects of a global society. The institution must also provide adequate support services and resources to facilitate student success. All business graduates are expected to be competent in the following:

- Knowledge of essential elements and operations of a business
- Knowledge of business ethics
- Computer literacy
- Global business awareness
- Critical thinking and research skills

Business programs require at least the following: 25 percent professional component, 25 percent general education component, and 25 percent business major component (courses for the associate degree beyond the professional component devoted appropriately to the student's area of concentration). For transfer degree programs with documented justification, the business major component and/or the professional component may be satisfied by non-business courses.

Criterion 6.1 Curriculum

Institution Response

- A. Describe how the business unit manages key processes for design and delivery of its educational programs and offerings.
- B. Describe how the business unit ensures that courses taught by both full-time and part-time faculty are of comparable quality and consistency.

Criterion 6.2 Professional Component

At least 25 percent of the business curriculum must consist of a professional component including four of the following areas of study:

- A. Accounting
- B. Computer information applications
- C. Quantitative methods of analysis
- D. Principles of economics
- E. Business in society - the international environment, legal/political environment, and ethical business behavior
- F. Marketing
- G. Entrepreneurship/free enterprise
- H. Finance
- I. Management

Specific courses are not mandated and equal time is not expected to be allocated to each area. Courses taught outside of the business unit may be used to fulfill the professional component. It is the responsibility of the business faculty to monitor such courses to ensure that they provide the competencies implicit in the professional component.

Courses that satisfy the professional component cannot be used to satisfy the general education component or the business major component.

- **Areas of specialization that build and/or organize knowledge dealing with specific aspects of business and its environment with interactions between these elements**
- **The ability to increase knowledge, understanding, and skills in prerequisite and concurrent courses and to integrate and apply these gains to subsequent business courses in the major**
- **The depth and breadth of knowledge, understanding, and skills in the content area of specialization beyond that which is in the professional component**
- **Application of knowledge that is utilized by internships, field experiences and cooperative education, simulations, and/or similar activities which enhance the professional education experience**

Courses that satisfy the business major component cannot be used to satisfy the professional component or the general education component.

Institution Response

- A. Complete the Business Major Component portion of **Table 6.1 Curriculum Summary** for each program.
- B. Provide a detailed plan to improve and meet the criterion for any program not meeting the 25 percent standard.

Lake Superior State University
Lukenda School of Business

ACBSP TABLE 6.1: Curriculum Summary

Name of Major/Program: Small Business Administration

Total Number of Credit Hours in Degree

62

List courses appropriate for each area in the chart below.

Professional Component

Course Number	Course Title	Area of Study	Credit Hours
ACTG132	Principles of Accounting I	A	4
BUSN350	Business Law	E	3
ECON201	Principles of Macroeconomics	D	3
FINC245	Principles of Finance	H	3
MGMT280	Intro to Management Information Systems	B	3
MRKT281	Marketing Principles & Strategies	F	3
Total Credit Hours			19
Percent of Total Hours			31%

General Education Component

Course Number	Course Title	Educational Goal Area	Credit Hours
ENGL110	First-Year Composition I	1	3
ENGL111	First-Year Composition II	1	3
COMM101	Fundamentals of Speech Communication	1	3
MATH111	College Algebra	6	3
12 additional general education credits from two of the following categories: Humanities, Natural Science, Social Science, Diversity			12
Total Credit Hours			24
Percent of Total Hours			39%

Business Major Component

Course Number	Course Title	Credit Hours
BUSN101	Freshman Seminar	1
BUSN121	Introduction to Business	3
BUSN231	Business Communications	3
MGMT360	Management Concepts & Applications	3
MGMT365	Human Resource Management	3
MRKT389	Entrepreneurship	3
	Electives	3
Total Credit Hours		19
Percent of Total Hours		31%

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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Description of Major Assignments
This documentation is relevant to Question number:	Part 2 – Small Business Administration Question #16
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides examples of the types of challenging assignments students complete.

Lukenda School of Business
Associate - Small Business Administration
Description of Major Assignments

BUSN231 – Business Communications

Individual Portfolio Assignment

Assignments are a mix of in-class individual or group assessments, or web-based assignments. As a result, textbook study is very important. The goal of these in-class assignments is to gain hands-on experience applying theoretical concepts, evaluating and analyzing scenarios relating to individual or group dynamics. During lessons you will work individually or in groups on an assignment related to that day's topic. This collection of assigned activities make-up the portfolio, and it will be graded based on the quality of content, thinking and effort.

The assignments will include the development of:

- A personal brand
- Elevator pitch
- Job description
- Application letter
- Resume
- Current/future components to illustrate potential
- Follow-up letter
- Integration of course contents and academic support (i.e., citations)
- Personal reflection

This will involve preparation outside of class time (e.g., further reflection, development of components, job descriptions, academic support for choices you made, etc.) and individual effort. Academic sources (APA format) are also required to support the elements, design and communications provided. You will submit the portfolio via the CMS in one document, or alternatively a paper copy may be provided to the instructor by the due date/time.

Major Assignment

Students will be required to work in groups to produce a convincing proposal and report. The focus must illustrate a group, university, organization, world or community opportunity or concern that team members collectively have. Your team is to gather information from credible sources to frame and evaluate the issue or opportunity associated with the chosen focus area. While it is acceptable to incorporate several concepts from the course, please aim for depth rather than breadth regarding the use of course concepts. Your goal is to diagnose the mechanisms that are causing the problem or issue of concern in the organization. Initially, you may notice many symptoms (for instance, high turnover, seemingly low morale, low commitment, motivation etc.), but your task is to get to the underlying reason for these symptoms. And beware, sometimes the initial symptoms we think we see are not what they appear to be.

MRT389 – Entrepreneurship

Business Plan

As part of the business plan development students are required to develop a business idea, determine sustainability based on market size and create an implementation plan to get the business operational. Through this exercise students learn how to analyze and synthesize market data, develop financial information and draw conclusions based on their analysis. LSB faculty are invited to view the business plan presentations at the end of the semester.

Market Analysis: During the development phases of the business plan, students are required to collect information from various sources to determine market size. They are then required to analyze the data to determine the size of their target market.

Category Map: A component of the business plan requires students to develop a category map of the existing industry landscape. This requires students to determine trend drivers in the market and position existing competitors into the category map. This exercise forces students to think creatively in determining industry trends and future market growth potential.

Motivate and Retain Workers: A component of the business plan requires students to develop a "team" of top executives that will assist in the operation of their company. This includes developing job descriptions, core competencies required and educational desired backgrounds of each position. Students are asked to also create a compensation plan that will retain key executives. This may include equity positions, performance bonuses or stock options.

Development of Pro Forma Financial Statements: A component of the business plan is the development of pro forma income statement and balance sheet. Students are required to produce three years of statements under a poor, normal and good scenario.

Development and Presentation of Pitch Deck: A component of the business plan is the development and presentation of a power point "pitch deck" to potential investors. This presentation allows the student to explain their business idea, introduce their management team, explain how it will make a profit and ask for an investment. Students develop power point skills as well as public presentation skills.

MGMT360 – Management Concepts and Applications

Major Assignment

Students will be required to work in groups to produce a project plan or business plan illustrating actions that fulfill the crafted or existing strategy. The project or business can be either one that students create or one that already exists, with a specific objective to achieve.

Here are some things to consider when defining your project/business:

- It must result in a concrete (i.e., measurable/tangible) outcome that will provide insight into management practices. The ultimate goal is that you learn something.
- Choose something that you are familiar with or have some experience.
- Ensure the project or business is feasible, considering a reasonable amount of time and access to the resources required

MGMT280 – Introduction to Management Information Systems

Term Paper

Examples of paper topics:

- Driving Forces of Big Data Analysis
- Impacts of Social Media on Organizational Effectiveness & Efficiency
- Effects of Mobile Technologies on Organizational Effectiveness & Efficiency
- Security Issues of Information Systems in Cloud Computing
- Critical Success Factors Implementing Electronic Medical Records (EMR) Systems
- Emerging Technologies in Customer Relationship Management (CRM) Systems
- Emerging Technologies in Human Resources Information Systems (HRIS)
- Emerging Technologies in Supply Chain Management (SCM) Systems
- Human Computer Interface (HCI) Issues Related to Tablet PC

References:

- Recommended Textbooks:
 - Laudon & Laudon. *Management Information Systems*, Prentice-Hall.
 - LSSU KJS Library Link: <http://lssu.worldcat.org/oclc/57422650>
 - O'Brien & Marakas. *Management Information Systems*. McGraw-Hill. www.mhhe.com
 - Turban, et al. *Information Technology for Management*, Wiley.
 - Haag & Cummings. *Management Information Systems for Information Age*. McGraw-Hill. www.mhhe.com
- Academic Journals:
 - *Information Systems Research (ISR)* <http://isr.katz.pitt.edu/>
 - LSSU KJS Library Link: <http://lssu.worldcat.org/oclc/181819540>
 - *MIS Quarterly (MISQ)* www.misq.org
 - LSSU KJS Library Link: <http://lssu.worldcat.org/oclc/48415598>
 - *Communications of Association for Computing Machinery (CACM)* www.acm.org/pubs/cacm/
 - LSSU KJS Library Link: <http://lssu.worldcat.org/oclc/50818271>
 - *Journal of Management Information Systems (JMIS)* <http://jmis.bentley.edu/>
 - LSSU KJS Library Link: <http://lssu.worldcat.org/oclc/476086444>
 - *Decision Support Systems (DSS)* –Not at the Library, would need to Interlibrary Loan
- Trade Magazines:
 - CIO: web site www.cio.com
 - LSSU KJS Library Link <http://lssu.worldcat.org/oclc/16315402>
 - Information Week: www.informationweek.com
 - CFO: web site: www.cfo.com
 - KJS Library Link: <http://lssu.worldcat.org/oclc/42631273>
 - Human Resources Information Systems (HRIS)
- Professional Organizations:
 - Society for Information Management (SIM): www.simnet.org (Practitioners)
 - Association for Information Systems (AIS): www.aisnet.org (Academics)
 - Association for Computing Machinery (ACM): www.acm.org (Academics & Practitioners)
- Also check out the KJS Library Libguide for databases, etc. <http://libguides.lssu.edu/business>

	<ul style="list-style-type: none"> <input type="checkbox"/> Telling and accurate details are used to reinforce the author's arguments. <input type="checkbox"/> The paper is convincing and satisfying. (15 pts) 	<ul style="list-style-type: none"> <input type="checkbox"/> Generally accurate details are included but the reader is left with questions – more information is needed to fill in the blanks. <input type="checkbox"/> The paper leaves the reader vaguely skeptical and unsatisfied. (12 pts) 	<ul style="list-style-type: none"> <input type="checkbox"/> The paper leaves the reader unconvinced. (10 pts)
Research (15 pts)	<ul style="list-style-type: none"> <input type="checkbox"/> Uses an appropriate variety of technology and other sources (internet, textbook, current articles and peer-reviewed articles in MIS journals/trade publications), which are well integrated and support the author's points. <input type="checkbox"/> Citations use APA style format and are used appropriately. (15 pts) 	<ul style="list-style-type: none"> <input type="checkbox"/> Sources generally support the author's points, but more or a greater variety need to be cited. <input type="checkbox"/> Citations use APA style format and are used appropriately, but there are occasional errors. (12 pts) 	<ul style="list-style-type: none"> <input type="checkbox"/> One or two sources are used or sources fail to support the author's points. <input type="checkbox"/> Citations do not use APA style or are not used appropriately. (10 pts)
Writing / Communication Skills (15 pts)	<ul style="list-style-type: none"> <input type="checkbox"/> There is a clear thesis. <input type="checkbox"/> Subheadings are used appropriately and organize the paper. <input type="checkbox"/> Transitions clearly show how ideas connect. <input type="checkbox"/> Sequencing is logical and effective. <input type="checkbox"/> Spelling is generally correct. <input type="checkbox"/> Punctuation is accurate. <input type="checkbox"/> Grammar and usage contribute to the clarity. <input type="checkbox"/> Voice and style are appropriate for a technology paper. <input type="checkbox"/> Paragraphs are informative, coherent, and well-focused. (15 pts) 	<ul style="list-style-type: none"> <input type="checkbox"/> There is a thesis but it is ambiguous or unfocused. <input type="checkbox"/> Subheadings are not enough to help organize the paper. <input type="checkbox"/> Transitions often work well, but some leave connections between ideas fuzzy. <input type="checkbox"/> Sequencing shows some logic, but it is not under complete control. <input type="checkbox"/> Spelling is generally correct, but there are a few misspellings. <input type="checkbox"/> End punctuation is accurate, but other punctuation is missing or wrong. <input type="checkbox"/> There are problems with grammar and usage, but not enough to distort the meaning. <input type="checkbox"/> Voice and style are appropriate for a technology paper. <input type="checkbox"/> Paragraphs occasionally lack substance, focus or coherence. (12 pts) 	<ul style="list-style-type: none"> <input type="checkbox"/> There is no clear thesis. <input type="checkbox"/> Subheadings are not used and do not organize the paper. <input type="checkbox"/> Transitions do not work well, leaving the reader confused. <input type="checkbox"/> Sequencing seems illogical, disjointed, or forced. <input type="checkbox"/> There are frequent spelling errors. <input type="checkbox"/> Punctuation is often missing or incorrect, including terminal punctuation. <input type="checkbox"/> Errors in grammar or usage are frequent enough to become distracting and interfere with meaning. <input type="checkbox"/> Voice and style are not appropriate for a technology paper. <input type="checkbox"/> Paragraphs are not informative, coherent, and well-focused. (10 pts)
Conclusion (5 pts)	<ul style="list-style-type: none"> <input type="checkbox"/> Conclusion leaves the reader with a sense of closure and resolution. <input type="checkbox"/> Conclusion provides a summary of the key points and relevance to business. (5 pts) 	<ul style="list-style-type: none"> <input type="checkbox"/> Conclusion may not tie paper together into a coherent whole. <input type="checkbox"/> Conclusion provides a summary of the key points and relevance to business, but does not tie it together well. (4 pts) 	<ul style="list-style-type: none"> <input type="checkbox"/> No real conclusion to wrap things up. <input type="checkbox"/> Conclusion does not provide a summary of the key points and relevance to business. (3 pts)

PART 2: Degree-Level Review

Degree Program: Associate – Technical Accounting

Explain how the program works to address each of the following questions. For each question, respond with a narrative and supporting evidence.

Assessment (CC 4.B and CC 4.C)

13. Provide evidence that the degree-level program outcomes are clearly stated and are effectively assessed, including the “use of results.” Attach the 4-Column Program Assessment Report.

A report is attached that details the assessment criteria, results and use of results for the Technical Accounting program’s student learning outcomes for the 2016-2017 and 2017-2018 academic years.

14. Explain how results from degree assessments were used to improve the degree program. Include specific examples.

Enrollment in LSB’s associate degree programs is minimal. However, LSB faculty and staff have determined it is cost effective to continue offering the programs. All required courses for the two associate degrees are also required courses for LSB bachelor degrees. In addition, most students who earn a business associate degree continue in the LSB to earn a bachelor degree. Enrollment in the Technical Accounting program for the reporting period is summarized below.

Academic Year	Students with Technical Accounting as First Major	Students with Technical Accounting as Second Major	Total Enrollment
2016-2017	3	6	9
2017-2018	0	5	5

Source: <https://www.lssu.edu/institutional-research/interactive-reporting/#toggle-id-3>

LSB faculty and staff are reluctant to draw conclusions based solely on the performance of such a small number of students. Thus, other data, such as Major Field Test (MFT) results, is considered as well. The LSB administers the MFT every semester to senior students enrolled in the bachelor degree capstone course, Business Policy (BUSN466). Students are tested in nine business areas, and their scores are compared with those of thousands of students across the nation. In recent periods, LSB students have scored below the national mean in the Information Systems area. Although associate degree students do not take the MFT, the results indicate the majority of LSB students are weak in this area. Since it is important for business graduates of all degree levels to have a working knowledge of information systems, the LSB added Management Information Systems (MGMT280) to the Technical Accounting program’s requirements in 2018.

Intellectual Inquiry (CC 3.B).

16. Explain what the program does to engage students in collecting, analyzing, and communicating information; mastering modes of inquiry or creative work; developing skills integral to the degree program. Attach examples of undergraduate research, projects, and creative work.

LSB professors bring their professional experience into the classroom and focus on practical application through problem-based learning, case analysis and simulations. Examples of innovative methods used to engage and challenge technical accounting students include the following:

- Students have the option to take ACTG350 (Income Tax Practicum) as an elective. In this course, students prepare income tax returns electronically for community members through the IRS-sponsored Volunteer Income Tax Assistance program.
- Students in ACTG421 (Federal Taxation Accounting I) complete an individual income tax return project that requires them to manually prepare a Form 1040 with supporting schedules. A detailed description of the assignment is attached.
- Students complete two major projects in BUSN231 (Business Communications). One is a semester-long project that culminates in the development of an individual portfolio. The other is a group assignment that requires students to work together to write a convincing report that diagnoses the issues that are causing problems for an organization. A document that provides more detail on these assignments is attached.
- Students have the opportunity to participate in various LSSU student organizations that allow them to further explore the business world including the Accounting Club, the Investment Club and Enactus.

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Send email with supporting documentation to: TRACDAT@Issu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Program Assessment Report
This documentation is relevant to Question number:	Associate - Technical Accounting Question #13
Briefly summarize the content of the file and its value as evidence supporting program review:	The report provides evidence that the program's outcomes are clearly stated and effectively assessed.

Assessment: Program Four Column

Program (CoS) - Technical Accounting AA

Mission Statement: Undergraduate teaching and learning for undergraduate accounting students is designed to provide students with sufficient technical and professional knowledge as well as skills to form the foundation for a successful accounting career.

Assessment Contact: Prof. Mindy McCready

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>	
<p>Accounting Principles - Graduates will be able to apply generally accepted accounting principles to record and report accounting information relevant to internal and external users.</p> <p>Goal Status: Active</p> <p>Goal Category: Student Learning</p> <p>Goal Level (Bloom/Webb): Level 2 (Skills and Concepts) [Webb]</p> <p>Institutional Learning: ILO2 - Use of Evidence - Students will identify the need for, gather, and accurately process the appropriate type, quality, and quantity of evidence to answer a complex question or solve a complex problem.</p>	<p>Direct - Exam/Quiz - within the course - Exam 1 completed in ACTG132 that requires students to perform the first 5 steps of the accounting cycle</p> <p>Criteria Target: 80% of students will score 75% or higher</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: Yes</p> <p>86% of students scored 75% or higher (08/29/2018)</p>	<p>Use of Result: Because the goal was met, no changes will be made currently based on these results. (08/29/2018)</p>	
		<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>90% of students scored 75% or higher (08/28/2018)</p>	<p>Use of Result: This data is based on all students who took ACTG132 during the fall 2017 semester. Going forward, we will separate and analyze the data by student major program. (08/28/2018)</p>	
	<p>Communication - Graduates will be</p>	<p>Direct - Exam/Quiz - within the course - Exam 2 completed in ACTG132 that requires students to perform the last 4 steps of the accounting cycle</p> <p>Criteria Target: 80% of students will score 75% or higher</p>	<p>Finding Reporting Year: 2016-2017</p> <p>Goal met: No</p> <p>67% of students scored 75% or higher (08/29/2018)</p>	<p>Use of Result: Students struggled with closing entries. Additional examples will be completed together in class going forward. (08/29/2018)</p>
			<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: No</p> <p>71% of students scored 75% or higher (08/28/2018)</p>	<p>Use of Result: Students struggled with preparing closing entries. Additional class time will be allocated to this concept and additional related homework problems will be assigned. (08/28/2018)</p>
<p>Communication - Graduates will be</p>	<p>Direct - Writing Intensive</p>	<p>Finding Reporting Year: 2016-2017</p>		

<i>Program Outcomes</i>	<i>Assessment Criteria & Procedures</i>	<i>Assessment Results</i>	<i>Use of Results</i>
<p>Goal Category: Student Learning</p> <p>Goal Level (Bloom/Webb): Level 2 (Skills and Concepts) [Webb]</p>	<p>Criteria Target: 80% of students will score 75% or higher.</p>	<p>Finding Reporting Year: 2017-2018</p> <p>Goal met: Yes</p> <p>87% of students scored 75% or higher (08/28/2018)</p>	<p>(08/29/2018)</p> <p>Use of Result: This data is based on all students who took ACTG421 during 2017-2018. Going forward, results will be separated by student major program. (08/28/2018)</p>

Appendix Cover Sheet

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Send email with supporting documentation to: TRACDAT@lssu.edu, with a cc to your dean, or submit as a hardcopy to your dean.

School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Degree Audit
This documentation is relevant to Question number:	Associate - Technical Accounting Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The degree audit lists the program's requirements in terms of courses, credits, residency and GPA.

Lukenda School of Business
Associate Degree in Technical Accounting
Degree Audit

Name _____

A# _____

Intended graduation month/year ____/____

Advisor Approval _____

Departmental Requirements

ACTG132	4	_____	_____
ACTG133	4	_____	_____
ACTG232	4	_____	_____
ACTG233	4	_____	_____
ACTG332	4	_____	_____
ACTG333	4	_____	_____
ACTG421	3	_____	_____
BUSN101	1	_____	_____
BUSN231	3	_____	_____
BUSN350	3	_____	_____
MGMT280	3	_____	_____
ECON201 or	3	_____	_____
ECON202			
FNAC245 or	3	_____	_____
FNAC341	4	_____	_____

General Education Requirements

(Minimum 24 credits)

Oral & Written Communication

ENGL110	3	_____	_____
ENGL111	3	_____	_____
COMM101	3	_____	_____

Mathematics (minimum 3 credits)

_____	3	_____	_____
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12 additional Gen Ed credits are required (chosen from at least two of the following categories):

Social Science

BUSN121	3	Satisfied thru core course
ECON201 or	3	
ECON202		Satisfied thru core course

Natural Sciences

_____	3-4	_____	_____
_____	3-4	_____	_____

Humanities

_____	3-4	_____	_____
_____	3-4	_____	_____

Cultural Diversity

_____	3	_____	_____
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_____ At least 64 credits
 _____ Residency - 15 hours
 _____ 2.0 Overall GPA
 _____ 2.0 GPA in dept'l requirements

I certify that all departmental requirements are complete and the departmental grade point average is 2.0 or higher.

X _____
 Department Head, Lukenda School of Business

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	ACBSP Standards
This documentation is relevant to Question number:	Associate - Technical Accounting Question #15
Briefly summarize the content of the file and its value as evidence supporting program review:	The document shows how the program requirements meet ACBSP standards.

STANDARD 6: PROCESS MANAGEMENT

In order to prepare business graduates for professional careers, the curriculum must encompass subjects dealing with the specifics of the global work place and the more general aspects of a global society. The Institution must also provide adequate support services and resources to facilitate student success. All business graduates are expected to be competent in the following:

- Knowledge of essential elements and operations of a business
- Knowledge of business ethics
- Computer literacy
- Global business awareness
- Critical thinking and research skills

Business programs require at least the following: 25 percent professional component, 25 percent general education component, and 25 percent business major component (courses for the associate degree beyond the professional component devoted appropriately to the student's area of concentration). For transfer degree programs with documented justification, the business major component and/or the professional component may be satisfied by non-business courses.

Criterion 6.1 Curriculum

Institution Response

- A. Describe how the business unit manages key processes for design and delivery of its educational programs and offerings.
- B. Describe how the business unit ensures that courses taught by both full-time and part-time faculty are of comparable quality and consistency.

Criterion 6.2 Professional Component

At least 25 percent of the business curriculum must consist of a professional component including four of the following areas of study:

- A. Accounting
- B. Computer information applications
- C. Quantitative methods of analysis
- D. Principles of economics
- E. Business in society - the international environment, legal/political environment, and ethical business behavior
- F. Marketing
- G. Entrepreneurship/free enterprise
- H. Finance
- I. Management

Specific courses are not mandated and equal time is not expected to be allocated to each area. Courses taught outside of the business unit may be used to fulfill the professional component. It is the responsibility of the business faculty to monitor such courses to ensure that they provide the competencies implicit in the professional component.

Courses that satisfy the professional component cannot be used to satisfy the general education component or the business major component.

- **Areas of specialization that build and/or organize knowledge dealing with specific aspects of business and its environment with interactions between these elements**
- **The ability to increase knowledge, understanding, and skills in prerequisite and concurrent courses and to integrate and apply these gains to subsequent business courses in the major**
- **The depth and breadth of knowledge, understanding, and skills in the content area of specialization beyond that which is in the professional component**
- **Application of knowledge that is utilized by internships, field experiences and cooperative education, simulations, and/or similar activities which enhance the professional education experience**

Courses that satisfy the business major component cannot be used to satisfy the professional component or the general education component.

Institution Response

- A. Complete the Business Major Component portion of **Table 6.1 Curriculum Summary** for each program.
- B. Provide a detailed plan to improve and meet the criterion for any program not meeting the 25 percent standard.

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Description of Tax Return Project
This documentation is relevant to Question number:	Associate - Technical Accounting Question #16
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides an example of the type of challenging assignments students complete.

**Lukenda School of Business
ACTG421 – Federal Taxation Accounting I
Description of Major Course Assignment**

Individual Tax Return Assignment I

Required: Use the following information to complete Keith and Jennifer Hamilton's 2017 federal income tax return. If any information is missing, use reasonable assumptions to fill in the gaps. Form 1040, supporting schedules, and instructions to the forms and schedules can be found at the IRS website (www.irs.gov).

Facts:

1. Keith Hamilton is employed as an airline pilot for Flyby Airlines in Las Vegas, Nevada. Jennifer is employed as a teacher's assistant at Small World Elementary School, in Henderson, Nevada. Keith and Jennifer live in a home they purchased this year. Keith and Jennifer have three children who lived with them all year, Joshua (17), Danielle (14), and Sara (10). Keith and Jennifer provided the following personal information:
 - Keith and Jennifer do not want to contribute to the presidential election campaign.
 - Keith and Jennifer do not claim itemized deductions.
 - Keith and Jennifer have qualifying insurance for purposes of the the Affordable Care Act (ACA).
 - Keith and Jennifer live at 3678 Blue Sky Drive, Henderson, Nevada 89052.
 - Keith's birthday is 10/12/1972 and his Social Security number is 535-22-4466.
 - Jennifer's birthday is 7/16/1975 and her Social Security number is 535-44-2255.
 - Joshua's birthday is 6/30/2000 and his Social Security number is 454-54-5454.
 - Danielle's birthday is 8/12/2003 and her Social Security number is 343-43-4343.
 - Sara's birthday is 5/13/2007 and her Social Security number is 232-32-3232.

4. During 2017, Keith and Jennifer received \$550 in interest from Las Vegas municipal bonds, \$1,070 interest from U.S. Treasury bonds, and \$65 from their savings account at SCD Credit Union. Keith and Jennifer are joint owners of the Las Vegas city bonds and the U.S. Treasury bonds. They have a joint savings account at SCD Credit Union.
5. On January 21, 2017, Jennifer was involved in a car accident. Because the other driver was at fault, the other driver's insurance company paid Jennifer \$1,350 for medical expenses relating to her injuries from the accident and \$300 for emotional distress from the accident. She received payment on March 15, 2017.
6. Keith's father died on November 15, 2016. Keith received a \$100,000 death benefit from his father's life insurance policy on February 8, 2017.
7. On February 15, 2017, Keith hurt his arm on a family skiing trip in Utah and was unable to fly for two weeks. He received \$4,000 for disability pay from his disability insurance policy. He received the check on March 2, 2017. Flyby Airlines paid \$600 in premiums on this policy during 2017. The disability insurance policy premiums are paid for by Flyby Airlines as a fully taxable fringe benefit to Keith (the premiums paid on his behalf are included in Keith's compensation amount on his W-2).
8. Jennifer's grandmother died on March 10, 2017, leaving Jennifer with an inheritance of \$30,000. (She received the inheritance on May 12, 2017.) Flyby Airlines had space available on its Long Island, New York, flight and provided Keith, Jennifer, and their three children with free flights so they could attend the funeral. The value of the ticket for each passenger was \$600.
9. On April 1, 2017, Jennifer slipped in the Small World Elementary lunchroom and injured her back. Jennifer received \$1,200 in worker's compensation benefits because her work-related injury caused her to miss two weeks of work. She also received a \$2,645 reimbursement for medical expenses from the health insurance company. Small World Elementary pays the premiums for Jennifer's health insurance policy as a nontaxable fringe benefit.
10. On May 17, 2017, Keith and Jennifer received a federal income tax refund of \$975 from their 2016 federal income tax return.
11. On June 5, 2017, Keith and Jennifer sold their home in Henderson, Nevada, for \$510,000 (net of commissions). Keith and Jennifer purchased the home 11 years ago for \$470,000. On July 12, 2017, they bought a new home for \$675,000.
12. On July 25, 2017, Keith's aunt Beatrice gave Keith \$18,000 because she wanted to let everyone know that Keith is her favorite nephew.
13. On September 29, 2017, Jennifer won an iPad valued at \$500 in a raffle at the annual fair held at Joshua's high school.

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School:	Lukenda School of Business
Document Title (if attached) or Filename (if emailed):	Description of BUSN231 Projects
This documentation is relevant to Question number:	Associate - Technical Accounting Question #16
Briefly summarize the content of the file and its value as evidence supporting program review:	The document provides examples of the type of challenging assignments students complete.

Lukenda School of Business
BUSN231 – Business Communications
Description of Major Assignments

Individual Portfolio Assignment – 150 points or 20% of total course grade

Assignments are a mix of in-class individual or group assessments, or web-based assignments. As a result, textbook study is very important. The goal of these in-class assignments is to gain hands-on experience applying theoretical concepts, evaluating and analyzing scenarios relating to individual or group dynamics. During lessons you will work individually or in groups on an assignment related to that day's topic. This collection of assigned activities make-up the portfolio, and it will be graded based on the quality of content, thinking and effort.

The assignments will include the development of:

- A personal brand
- Elevator pitch
- Job description
- Application letter
- Resume
- Current/future components to illustrate potential
- Follow-up letter
- Integration of course contents and academic support (i.e., citations)
- Personal reflection

This will involve preparation outside of class time (e.g., further reflection, development of components, job descriptions, academic support for choices you made, etc.) and individual effort. Academic sources (APA format) are also required to support the elements, design and communications provided. You will submit the portfolio via the CMS in one document, or alternatively a paper copy may be provided to the instructor by the due date/time.

Major Assignment – 150 pts or 25% of final grade

Students will be required to work in groups to produce a convincing proposal and report. The focus must illustrate a group, university, organization, world or community opportunity or concern that team members collectively have. Your team is to gather information from credible sources to frame and evaluate the issue or opportunity associated with the chosen focus area. While it is acceptable to incorporate several concepts from the course, please aim for depth rather than breadth regarding the use of course concepts. Your goal is to diagnose the mechanisms that are causing the problem or issue of concern in the organization. Initially, you may notice many symptoms (for instance, high turnover, seemingly low morale, low commitment, motivation etc.), but your task is to get to the underlying reason for these symptoms. And beware, sometimes the initial symptoms we think we see are not what they appear to be.