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|------------------|------------------|--------------------|--------------------|---------------------|
| LSC Use Only No: | LSC Action-Date: | UWUCC USE Only No. | UWUCC Action-Date: | Senate Action Date: |
|                  |                  | 04-64c             | AP-4/12/05         | App-4/22/08         |

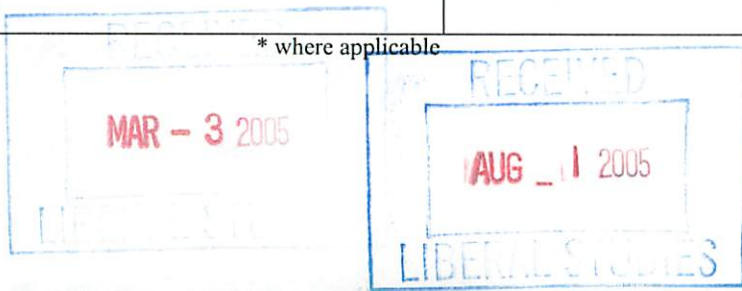
### Curriculum Proposal Cover Sheet - University-Wide Undergraduate Curriculum Committee

|                                                |                                         |
|------------------------------------------------|-----------------------------------------|
| Contact Person<br><b>Dr. Stephen Osborne</b>   | Email Address<br><b>osborne@iup.edu</b> |
| Proposing Department/Unit<br><b>Management</b> | Phone                                   |

Check all appropriate lines and complete information as requested. Use a separate cover sheet for each course proposal and for each program proposal.

|                                                                                                                                                                                                                                                                                                                                                       |                        |                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-------------------------------------------------------------------|
| <b>1. Course Proposals (check all that apply)</b><br><input type="checkbox"/> New Course <input type="checkbox"/> Course Prefix Change <input type="checkbox"/> Course Deletion<br><input checked="" type="checkbox"/> Course Revision <input type="checkbox"/> Course Number and/or Title Change <input type="checkbox"/> Catalog Description Change |                        |                                                                   |
| Small Business Planning—MGMT 403                                                                                                                                                                                                                                                                                                                      |                        |                                                                   |
| <u>Current Course prefix, number and full title</u>                                                                                                                                                                                                                                                                                                   |                        | <u>Proposed course prefix, number and full title, if changing</u> |
| <b>2. Additional Course Designations: check if appropriate</b><br><input type="checkbox"/> This course is also proposed as a Liberal Studies Course. <input type="checkbox"/> Other: (e.g., Women's Studies, Pan-African)<br><input type="checkbox"/> This course is also proposed as an Honors College Course.                                       |                        |                                                                   |
| <b>3. Program Proposals</b><br><input type="checkbox"/> New Degree Program <input type="checkbox"/> Program Title Change <input type="checkbox"/> Program Revision<br><input type="checkbox"/> New Minor Program <input type="checkbox"/> New Track <input type="checkbox"/> Other<br><input type="checkbox"/> Catalog Description Change             |                        |                                                                   |
| <u>Current program name</u>                                                                                                                                                                                                                                                                                                                           |                        | <u>Proposed program name, if changing</u>                         |
| <b>4. Approvals</b>                                                                                                                                                                                                                                                                                                                                   |                        |                                                                   |
| Department Curriculum Committee Chair(s)                                                                                                                                                                                                                                                                                                              | <i>Joan Wisinski</i>   | 2-28-05                                                           |
| Department Chair(s)                                                                                                                                                                                                                                                                                                                                   | <i>Pronto Bn'</i>      | 2-28-05                                                           |
| College Curriculum Committee Chair                                                                                                                                                                                                                                                                                                                    | <i>[Signature]</i>     | 2 MAR 05                                                          |
| College Dean                                                                                                                                                                                                                                                                                                                                          | <i>R. Coney</i>        | 3-2-05                                                            |
| Director of Liberal Studies *                                                                                                                                                                                                                                                                                                                         |                        |                                                                   |
| Director of Honors College *                                                                                                                                                                                                                                                                                                                          |                        |                                                                   |
| Provost *                                                                                                                                                                                                                                                                                                                                             |                        |                                                                   |
| Additional signatures as appropriate:<br>(include title)                                                                                                                                                                                                                                                                                              |                        |                                                                   |
| UWUCC Co-Chairs                                                                                                                                                                                                                                                                                                                                       | <i>Gail S Sedquist</i> | 4-12-05                                                           |

\* where applicable



**INDIANA UNIVERSITY OF PENNSYLVANIA  
DEPARTMENT OF MANAGEMENT  
MGMT 403/503 SMALL BUSINESS PLANNING**

**PREREQUISITES:** ACCT 300, BTED/IFMG/COSC 101, MGMT 325  
(Undergraduate). Permission (Graduate)

**CATALOG DESCRIPTION:**

Integrates the content of much of the business core and relates it to the business planning for small businesses and entrepreneurial efforts. The student will be introduced to the concepts which will support the development of an effective business & marketing plan.

**COURSE DESCRIPTION:**

In MGMT503, in addition, students are expected to integrate and apply concepts from prior course work in the analysis and production of a business & marketing plan for an actual local small business.

**COURSE OBJECTIVES**

Main objective of the course is to utilize the theoretical knowledge and skills of students to provide assistance to local businesses and other organizations, thereby providing students with not only valuable hands-on experience but also the ability to enhance their understanding of the theory. A project is at the center of the MGMT403/503 course.

Students work in teams (typically of 3-4 students) with the client's small business under the close supervision of faculty advisor toward the successful completion of the project.

**The students are required to:**

- (1) Work closely with the instructor,**
- (2) Interact with the client at the work premises, and**
- (3) Undertake whatever research is necessary to complete the project (e.g., library research, primary research, etc.).**

**The final output of the team will include a written report and formal presentation to the client.**

## ***Specific Objectives***

The objectives of this course are as follows:

- To provide an opportunity for the students to **integrate and apply their course work and other experiences** in an actual business setting.
- To **expose students to (often not-so-small) "small businesses,"** a major source of economic growth, wealth, and jobs in this country.
- To provide students with an **experience that will significantly enhance their marketability.**
- To **assist local businesses and organizations** with their needs as well as for the purpose of creating **economic growth and jobs** for the region.

## ***GRADING PROCEDURES***

**ASSIGNMENTS** – Based on in-class material . . . . . 10%

**INTERIM REPORT (CHAPTERS 1 & 2)** . . . . . 10%

This report will be judged on the basis of timeliness (e.g., due by week 7) and quality (the report should be complete *and* very high quality). Failure to meet this deadline and quality requirement will hurt your final grade.

**WEEKLY LOGS** (DUE FRIDAY EACH WEEK) . . . . . 5%

Keep a copy of each log.

**PROJECT REPORT** (FINAL, COMPLETE) . . . . . 45%

**FORMAL PRESENTATION TO CLIENT** . . . . . 10%

**PROFESSIONALISM** (w/GROUP & CLIENT) . . . . . 5%

Professionalism includes being on time for meetings with group, faculty, and clients; producing high quality, timely work; demonstrating a high level of personal responsibility; etc.

**EXAM** . . . . . 15%

**\* GRADUATE STUDENTS ENROLLED IN MGMT503 WILL BE HELD TO A HIGHER STANDARD OF PERFORMANCE AND**

**WILL BE INVOLVED IN MORE COMPLEX CONSULTING PROJECTS.**

## **CLASS SCHEDULE**

During the semester, students will be required to meet with the class during the regularly scheduled class period. This will entail a number of sessions, some of which may be conducted via email/internet. **NOTE – SOME TOPICS MAY INVOLVE 2 CLASS SESSIONS.**

| <b>* <u>TOPIC #</u></b> | <b><u>ACTIVITIES</u></b>                                                                                                                                                                                                                                                                             |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1                       | Introduction to course<br>Formation of consulting groups                                                                                                                                                                                                                                             |
| 2                       | Introduction to management, general management; the concept of strategy<br><b><u>Assignments:</u></b> Define "management"<br>Define "general management"<br>Define "strategy"                                                                                                                        |
| 3                       | Mission; Objectives; Business Level Strategy (B-L-S); Corporate Level Strategy (C-L-S)<br><b><u>Assignments:</u></b> Relate/develop/express Mission Statement, Objectives, Business Level Strategy and Corporate Level Strategy for your client                                                      |
| 4                       | Strengths, Weaknesses, Opportunities, and Threats (SWOT); Key Success Factors (KSFs); 5 Forces of Industry Competition (Industry Structure); Strategic Groups<br><b><u>Assignments:</u></b> Conduct SWOT Analysis, Identify KSFs, Prepare Strategic Map and Perform 5 Forces Analysis of your client |
| 5                       | The Small Business Development Center (SBDC) & Business Planning (Guest Speaker)                                                                                                                                                                                                                     |
| 6                       | The U.S. Small Business Administration (SBA) & Business Planning (Guest Speaker)                                                                                                                                                                                                                     |
| 7                       | Exam                                                                                                                                                                                                                                                                                                 |

## **"CONSULTING CASE "TENTATIVE SCHEDULE:**

| <b><u>WEEK #</u></b> | <b><u>ACTIVITIES</u></b>                                                                                               |
|----------------------|------------------------------------------------------------------------------------------------------------------------|
| 1 & 2                | Introduction<br>*** Team Formation/Client Selection ***<br>*** Introduction to Client ***                              |
| 2                    | Client Meetings<br>*** Letter of Confidentiality Due ***                                                               |
| 3                    | Problem Definition<br>Development of Objectives<br>Initiation of Research<br>*** Draft of Letter of Engagement Due *** |
| 4                    | *** Final Letter of Engagement Due ***<br>Client Meetings<br>Continue Research                                         |
| 5-6                  | Develop methodology and research project                                                                               |
| 7                    | *** Interim Report Due - Chapters 1 & 2 ***                                                                            |
| 8-10                 | Finalize Research<br>Prepare Report Outline<br>Begin First Draft                                                       |
| 11                   | *** Draft of Formal Report Due ***                                                                                     |
| 13                   | Revised Formal Report Due                                                                                              |
| 14                   | *** Final Formal Report Due ***                                                                                        |
| 15                   | *** Presentation of Final Report to Client ***                                                                         |

## **THE PROJECT REPORT**

The report is written for the client. The report will be a professionally prepared manuscript of the highest quality. It is a detailed, descriptive and analytical report that includes the following **major components**:

- Title Page
- Executive Summary
- Table of Contents
- Introduction
- Body of Report (5 or more chapters)
- A variety of forms
- Bibliography/References
- Appendices
- Other sections as appropriate/required (see syllabus for details of the report)

## **FORMS AND REPORTS REQUIRED**

**REQUEST FOR COUNSELING**

**LETTER OF ENGAGEMENT**

**CONFIDENTIALITY STATEMENT**

**CLIENT ACKNOWLEDGMENT FORM**

**SUMMARY OF HOURS REPORT**

**WEEKLY LOGS** (for each team member)

**INTERIM REPORT - OBJECTIVES AND METHODS**

**FINAL REPORT (SEE NEXT PAGE FOR DETAILS)**

**FORMAL PRESENTATION TO CLIENT**

***EVALUATION OF GROUP MEMBERS***

## **INTERIM REPORT (CHAPTERS 1 & 2)**

**THIS REPORT SERVES THREE CRITICAL PURPOSES:**

(1) PROVIDE HISTORICAL BACKGROUND/OVERVIEW OF COMPANY

(2) SPECIFY "WHAT IS TO BE DONE"

(3) DETAIL "HOW IT IS TO BE DONE"

**CHAPTERS 1 & 2 INCLUDE THE FOLLOWING:**

|                                         |   |         |
|-----------------------------------------|---|---------|
| BRIEF, DETAILED COMPANY HISTORY/PROFILE | > | CHAPTER |
| PROBLEMS & ISSUES OF ORGANIZATION       | > | 1       |

|                                        |   |         |
|----------------------------------------|---|---------|
| OBJECTIVES OF PROJECT; WHAT THE GROUP  | > |         |
| WILL PROVIDE CLIENT BY END OF PROJECT  | > | CHAPTER |
|                                        | > | 2       |
| METHODS UTILIZED TO ACHIEVE OBJECTIVES | > |         |

## **FINAL REPORT (TO BE PRESENTED TO CLIENT)**

- COPIES TO CLIENT, AND SBI DIRECTOR (2) - TOTAL OF 3 COPIES
- PROFESSIONAL (THE **"BEST DOCUMENT YOU HAVE EVER WRITTEN"**)
- **DON'T WAIT UNTIL END OF TERM TO PREPARE!!!!**

| <b><u>MINIMUM CONTENTS OF FINAL REPORT</u></b> | <b><u>APPROX. PAGES</u></b>  |
|------------------------------------------------|------------------------------|
| TITLE PAGE                                     | 1                            |
| CLIENT ACKNOWLEDGMENT FORM                     | 1                            |
| TABLE OF CONTENTS                              | 1 - 3                        |
| EXECUTIVE SUMMARY                              | 2 - 4                        |
| CHAPTER 1 - HISTORY & OVERVIEW                 | 4 - 8 <sup>+</sup>           |
| CHAPTER 2 - OBJECTIVES & METHODOLOGY           | 5 - 9 <sup>+</sup>           |
| CHAPTER 3 – STRATEGIC OVERVIEW                 | 10                           |
| CHAPTER 4 - ANALYSIS CONDUCTED                 | 25 - 75 <sup>+</sup>         |
| CHAPTER 5 - RECOMMENDATIONS                    | $\frac{3 - 6^+}{52 - 117^+}$ |
| BIBLIOGRAPHY/REFERENCES                        | 1                            |
| LETTER OF ENGAGEMENT                           | 1 - 2                        |
| REQUEST FOR COUNSELING (FORM 1062)             | 1                            |
| SUMMARY OF HOURS                               | 2                            |
| CONFIDENTIALITY STATEMENT                      | 1                            |
| APPENDICES (SECONDARY INFORMATION)             | VARIOUS                      |

**THE REPORT STRUCTURE/LENGTH MAY VARY FROM CASE TO CASE  
(PARTICULARLY CASES INVOLVING MORE THAN ONE "PROJECT")**

## **STRATEGIC OVERVIEW (CHAPTER 3)**

. The content for this section will be based on the in-class discussion of management, general management, strategy and strategic management. ***The contents of this section will vary depending on your client and case supervisor(s)*** but could include the following:

- **MISSION STATEMENT** (Prepare one if the organization does not already have one)
- **OBJECTIVES OF ORGANIZATIONS** (Either explicit or implicit objectives)
- **STRATEGY OF ORGANIZATION** (Express in terms of Business Level (BLS) and Corporate Level (CLS) as appropriate for your client)
- **CONDUCT SWOT ANALYSIS OF ORGANIZATION**
- **IDENTIFY KEY SUCCESS FACTORS FOR THE INDUSTRY IN WHICH YOUR CLIENT IS PRIMARILY INVOLVED.**
- **IDENTIFY YOUR CLIENT'S PRINCIPAL COMPETITORS**
- **DEVELOP STRATEGIC GROUP MAP**
- **CONDUCT COMPETITIVE ANALYSIS BASED ON PREVIOUS 3 POINTS AND 5 FORCES OF INDUSTRY COMPETITION (INDUSTRY STRUCTURE)**
- **SUMMARIZE THE STRATEGIC POSITION OF YOUR CLIENT AND MAKE RECOMMENDATIONS REGARDING THEIR STRATEGIC OPTIONS**

## **BIBLIOGRAPHY:**

Bangs, David H. *The Business Planning Guide: Creating a Plan for Success in Your Own Business*, 2002

Caplan, Suzanne and Nunally, Thomas M. *The Small Business Insider's Guide to Bankers*, 1997

Gallagher, Bill. *Guerilla Selling: Unconventional Weapons and Tactics for Making the Sale*, 1991

Levinson, Jay C. and Godin, Seth. *The Guerrilla Marketing Handbook*, 1994

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Levinson, Jay C. *Guerrilla Marketing Excellence: The 50 Golden Rules for Small Business Success*, 1993

Timmons, Jeffry A. *New Venture Creation: Entrepreneurship in the 1990s*, 1990

Vesper, Karl H. *New Venture Mechanics*, 1993

Weinrauch, J. Donald and Baker, Nancy C. *The Frugal Market*, 1989