## I. General Education Review - Upper-division Writing Requirement

<table>
<thead>
<tr>
<th>Dept/Program Subject</th>
<th>Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course(s) Title</td>
<td>Small Business Management and Strategic Planning</td>
</tr>
<tr>
<td>Course # (i.e. ANTH 455) or sequence</td>
<td>MGMT445</td>
</tr>
<tr>
<td>Description of the requirement if it is not a single course</td>
<td>This is a single course.</td>
</tr>
</tbody>
</table>

### II. Endorsement/Approvals

Complete the form and obtain signatures before submitting to Faculty Senate Office.

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Heidi DeArment and several consultants from MCDC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone / Email</td>
<td>243–6174, <a href="mailto:heidi@mcdc.org">heidi@mcdc.org</a></td>
</tr>
<tr>
<td>Program Chair</td>
<td>Jeff Shay</td>
</tr>
</tbody>
</table>

### III. Overview of the Course Purpose/Description

The Small Business Institute at the University of Montana provides a service to Montana businesses, start-ups, and not-for-profits (clients) and an opportunity for students to gain hands-on business experience and strong business communications skills via the course MGMT 445. The program is administered by the Montana Community Development Corporation (MCDC) in Missoula through a strategic alliance with SoBA. Student teams work with the client in a consulting role and are required to write a consulting report, business plan, strategic plan, marketing plan or something similar to those. During the first two weeks of classes, students learn basic project management skills, receive information about the projects and businesses, build teams, and select a project according to their interests. During the remainder of the semester, students meet and interact with one or several contact persons at the client, engage in various forms of research, and prepare and write the report. There are also weekly meetings with the course instructor. The class culminates in the report presentations during the last weeks of classes. Heavy emphasis in this course is placed on the concept and practice of professionalism.

### IV. Learning Outcomes: Explain how each of the following learning outcomes will be achieved.
### Student learning outcomes:
Identify and pursue more sophisticated questions for academic inquiry

This capstone course for all business students requires that students utilize knowledge and skills learned and developed across our entire curriculum to solve the real world challenges and issues faced by clients. To complete these projects students must identify the problems faced by the client’s organization and develop real world solutions that many clients actually implement. The vary nature of real world projects necessarily makes them more complex than those projects and assignments that come from text books. Specifically, students will:

1. Apply skills learned during your career as a student to real business problems, involving analysis, solution development, and implementation.

2. Sharpen your communication skills by interacting with people in professional organizations, writing a comprehensive report, and presenting it to a challenging audience.

3. Engage in entrepreneurial and strategic thinking.

4. Recognize the interaction between different business areas, e.g. innovation, production, financing, accounting, management, and marketing.

5. Perform as part of a group of peers challenged by a demanding project with severe time constraints.

6. Develop basic managerial skills such as leadership, decision making, and prioritizing.

7. Improve skills in project management and group effectiveness.

8. Learn to teach yourself by working independently and finding resources necessary to complete the project.
### Find, evaluate, analyze, and synthesize information effectively from diverse sources

Students are required to find, evaluate, analyze, and synthesize information from a variety of sources in order to complete their projects and present a professional quality report to their client. Sources may include: interviews with clients, key stakeholders, competitors, etc.; library research; trade journal research; internet research; etc. Because these are real world problems and final reports are professionally presented to clients, rigorous research is required.

### Manage multiple perspectives as appropriate

This capstone course is integrative in nature in that requires students to bring in perspectives from all aspects of business: marketing, finance, accounting, management, law, information systems, etc. To complete their project students must draw upon the knowledge, skills, and analytical tools learned throughout the SoBA curriculum.

### Recognize the purposes and needs of discipline-specific audiences and adopt the academic voice necessary for the chosen discipline

Students are required to utilize a business professional/technical writing style when preparing their projects for this course. Their specific audience is determined by the client and the students must adopt the appropriate voice to meet their needs. For example, strategic plans are primarily for internal use by the client, while business plans are written for bankers or investors (each having their own expectations as well).

### Use multiple drafts, revision, and editing in conducting inquiry and preparing written work

Students are required to submit multiple drafts of their final project throughout the semester as described in the syllabus. Each draft is evaluated for both writing and content and students are required to make revisions before the final report is submitted to the client.

### Follow the conventions of citation, documentation, and formal presentation appropriate to that discipline

Students are required to utilize professional citations as appropriate in a business context. This is usually the APA style.

### Develop competence in information technology and digital literacy

The nature of these professional reports requires significant competencies in all facets of information technology.

### V. Writing Course Requirements Check list

| Is enrollment capped at 25 students? If not, list maximum course enrollment. Explain how outcomes will be adequately met for this number of students. Justify the request for variance. |
| Yes x No |
| The course is offered in both the fall and the spring. Fall enrollments have ranged during the past few years between 12 and 25 students. Spring enrollments have ranged from 40 to 60 students. During the spring semester, however, |
MCDC assigns only two project teams (approximately 4 students per team) to one of their consultants who oversees the project. As such, although Heidi DeArment is the instructor of record, she employs several consultants and this reduces the actual student-teacher ratio to approximately 8-1.

| Are outcomes listed in the course syllabus? If not, how will students be informed of course expectations? | X Yes □ No |
| Are detailed requirements for all written assignments including criteria for evaluation in the course syllabus? If not how and when will students be informed of written assignments? | X Yes □ No |
| Briefly explain how students are provided with tools and strategies for effective writing and editing in the major. | In addition to Gen Ed requirements, students in each of our majors are required to write papers during each year of our program. We also encourage students to utilize UM’s Writing Center and offer courses such as MGMT444 Management Communication that are focused specifically on developing writing skills. We have recently hired graders for our IS270 course to provide multiple iterations of feedback on student writing and SoBA is rolling out a pilot writing program this spring. |
| Will written assignments include an opportunity for revision? If not, then explain how students will receive and use feedback to improve their writing ability. | X Yes □ No |
| Are expectations for Information Literacy listed in the course syllabus? If not, how will students be informed of course expectations? | X Yes □ No |

**VI. Writing Assignments:** Please describe course assignments. Students should be required to individually compose at least 20 pages of writing for assessment. At least 50% of the course grade should be based on students’ performance on writing assignments. Clear expression, quality, and accuracy of content are considered an integral part of the grade on any writing assignment.

| Formal Graded Assignments | Project Proposal = 10%  
First Draft of Final Report = 10%  
Final Report = 30%  
Bi-weekly journals = 10%  
Total = 60% |
| Each student in the course writes more than 20 pages over the course of the semester that is |
assessed and evaluated by the instructors.

Informal Ungraded Assignments

Students must maintain contact with clients and instructor via memos and emails. These must be professionally written.

VII. Syllabus: Paste syllabus below or attach and send digital copy with form. The syllabus should clearly describe how the above criteria are satisfied. For assistance on syllabus preparation see: http://teaching.berkeley.edu/bgd/syllabus.html

I. INSTRUCTOR
Heidi DeArment
Faculty Website:
e-mail: heidid@mtcdc.org
Phone: (406) 728-9234 x213
Office: 110 E. Broadway, 2nd Floor

II. COURSE DESCRIPTION
The Small Business Institute at the University of Montana pairs students with businesses in Western Montana to provide business plans, marketing plans, and feasibility studies to the businesses and an opportunity for students to gain hands-on business experience and strong business communication skills. Student teams work with the business client in a consulting role and are coached weekly by instructors.

Prerequisites include senior standing in Business, all business core. The instructor reserves the right to administratively drop, at any point, any student who has not met the prerequisites.

The class is broken into five sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Rough Timeframe</th>
<th>Content</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Team Building</td>
<td>1st Two Weeks</td>
<td>• Understand Syllabus and Schedule</td>
<td>Classroom</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Form Teams</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Choose clients</td>
<td></td>
</tr>
<tr>
<td>2. Project Management</td>
<td>2nd Two Weeks</td>
<td>• Conduct initial client meeting</td>
<td>Classroom – instruction</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Understand client needs</td>
<td>Client Business Location</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Regular class meetings</td>
<td>– client student meetings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Create project plan (in MS project)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Get plan approval from client</td>
<td></td>
</tr>
<tr>
<td>3. Project Development</td>
<td>Bulk of semester</td>
<td>• Weekly meeting with instructor</td>
<td>MCDC Office</td>
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<tr>
<td></td>
<td></td>
<td>• Gather data</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Weekly communication with client</td>
<td>Client Business Location</td>
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<tr>
<td></td>
<td></td>
<td>• Write project/report multiple times</td>
<td></td>
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</tbody>
</table>

5
### III. COURSE OBJECTIVES

9. Apply skills learned during your career as a student to real business problems, involving analysis, solution development, and implementation.

10. Sharpen your communication skills by interacting with people in professional organizations, writing a comprehensive report, and presenting it to a challenging audience.

11. Engage in entrepreneurial and strategic thinking.

12. Recognize the interaction between different business areas, e.g. innovation, production, financing, accounting, management, and marketing.

13. Perform as part of a group of peers challenged by a demanding project with severe time constraints.

14. Develop basic managerial skills such as leadership, decision making, and prioritizing.

15. Improve skills in project management and group effectiveness.

16. **Learn to teach yourself by working independently and finding resources necessary to complete the project.**

### IV. SUGGESTED TEXT

The following text is recommended for the course and is available in the bookstore. If you do not choose to purchase this book, you will be required to show the text that you are using for content and development of your client plan. Resources that can be used in addition to a text book can be found in Appendix F.


### V. GRADING
### Requirement Weight (%)

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Weight (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Proposal**</td>
<td>10</td>
</tr>
<tr>
<td>First Draft of Final Report**</td>
<td>10</td>
</tr>
<tr>
<td>Final Report**</td>
<td>30</td>
</tr>
<tr>
<td>Class Presentation**</td>
<td>15</td>
</tr>
<tr>
<td>Client Presentation**</td>
<td>5</td>
</tr>
<tr>
<td>Bi-Weekly Journals</td>
<td>10</td>
</tr>
<tr>
<td>Peer Evaluations</td>
<td>15</td>
</tr>
<tr>
<td>Career Development Req.</td>
<td>5</td>
</tr>
</tbody>
</table>

**Total 100**

**Group Grade**

Note: There are no exams, quizzes, or a final. Almost all your efforts should go into the project.

Late projects/assignments will receive a “0”. Failing to turn in the first draft of the final report or the final report on time will result in a failing grade.

### Scale for Grading

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>A</td>
<td>93%-100%</td>
</tr>
<tr>
<td>A-</td>
<td>90%-92.9%</td>
</tr>
<tr>
<td>B+</td>
<td>87%-89.9%</td>
</tr>
<tr>
<td>B</td>
<td>83%-86.9%</td>
</tr>
<tr>
<td>B-</td>
<td>80%-82.9%</td>
</tr>
<tr>
<td>C+</td>
<td>77%-79.9%</td>
</tr>
<tr>
<td>C</td>
<td>73%-76.9%</td>
</tr>
<tr>
<td>C-</td>
<td>70%-72.9%</td>
</tr>
<tr>
<td>D+</td>
<td>67%-69.9%</td>
</tr>
<tr>
<td>D</td>
<td>63%-66.9%</td>
</tr>
<tr>
<td>D-</td>
<td>60%-62.9%</td>
</tr>
<tr>
<td>F</td>
<td>Below 70%</td>
</tr>
</tbody>
</table>

### VI. COURSE TEAMS

During the first two weeks of class, students will form teams of 3 – 5 members. You will choose your own team. You are urged to choose not just among friends, but considering diversity in skills and experience, and your schedule. Further, you should take the nature of your preferred project into consideration. For instance, projects will require skills in accounting, marketing, operations, writing, and finance. Your team should be skilled in all of these areas.

Very importantly, one member of your team will be required to provide the final revision/rewrite. This is intended to put the sections of this project into one voice; please make sure that you have one group member who is willing to be the final writer.

### VII. CLIENT PROJECT

Client projects are arranged by the UM Small Business Institute (SBI) instructors. Student teams may not choose projects outside of those arranged by the SBI. Each team takes on one specific project.

If two or more teams apply for the same project the instructor will assign this project to the team which apparently has assembled the most appropriate skills, unless this conflict can be resolved between the competing teams.
Clients pay $500 per project ($250 is the nonprofit rate) to the SBI which is used to cover the expenses incurred by students. Clients are billed through the SBI program the fourth week of school; students do not need to collect the payments.

The projects include business plans, marketing plans, and feasibility studies. The expectation is for the project to be excellent. Unlike a term paper, each report must be of professional quality before it is considered finished and sent to the client.

For all written work, writing style, the appropriate use of headlines, spelling, grammar, etc. are taken into consideration for grading. Submissions must be printed on standard paper (8.5” x 11”), have one inch margin all around, and Arial 10-pt. font size. All work should be single-spaced. Your table of contents must be created using MS Word’s table of contents feature. Format for the cover page is in Appendix D and must be followed. Tips for writing an Executive Summary are in Appendix E. Overall professional appearance is mandatory. Any deviations will result in lost points.

In addition to excellent projects, you will be expected to maintain excellent communication with the client. Each team needs to get and keep in touch with their selected client on at least a weekly basis throughout the semester.

The overall project consists of 6 components as outlined below (see schedule for due dates on each):

1. **Project Proposal** – This is a written proposal detailing what you will provide to the client. The proposal is divided into 8 titled sections outlined below:
   1. The Client – A description of the client (organization or individual[s])
   2. The Problem – A definition of the project/problem and desired results
   3. Methodology – A detailed discussion your approach (method/s) to solve the problem(s)
   4. Resources – A list resources to be used in the process
   5. Boundaries - Set specific boundaries of what the client can expect from you and specifically exclude anything that would typically be included in your type of project but will not be in this specific project with the rationale
   6. Schedule – The specific time schedule with each deliverable/task that needs to be completed to deliver the completed project and presentation with the person responsible for each task. This schedule must be in MS Project format (Gant chart.)
   7. Table of Contents - The anticipated table of contents of your final report in as much detail as possible.
   8. Signatures – A place for you and client to sign the proposal authorizing your group to move forward and promising your services to the client. *The plan must be signed by all parties to receive credit for the project plan.*

2. **First Draft of Report** - The first draft must be a complete the report which means that all of the sections in the table of contents must be completed. You will turn in a first draft to your instructor to make written suggestions for further improvement. The first draft cannot submit individual sections and it cannot be submitted incomplete. If data collection was delayed on any section, the rough draft must include an explanation of the status of any missing data. Criteria for grading of the first draft are the same as for the final report (see below), although I will consider that this is a draft that needs further honing. Therefore I focus more on the completeness and logic of the table of contents and the overall effort invested in the project.

   *If the first draft is not submitted complete and on time, you will receive an F in the course and will not be allowed to finish the semester.*
All work must be footnoted or endnoted and comply with the student code of conduct. Plagiarism and uncited work will result in a failing grade.

Subsequent drafts may be submitted between the deadline for the rough draft and the final paper. Re-drafts will be due on a schedule established between the team and instructor – until a professional, clean manuscript is ready for duplication and submission to the client. The final draft, before you turn in the final report, must be reviewed with the client.

3. Final Report - The final report must be complete, professional, internally consistent, compelling, sophisticated in approach, comprehensive in thought, and written in one voice. These are the criteria by which it will be graded. Specific sections will be developed with your instructor on a project-by-project basis.

Teams that do not submit a completed report on the due date will receive an F for the semester.

All work must be footnoted or endnoted and comply with the student code of conduct. Plagiarism and uncited work will result in a failing grade.

Costs incurred by students. All printing, copying, and CD burning can be done for you by Heather Breckenridge at GBB 355 and heather.breckenridge@business.umt.edu. You must submit the data to be copied, bound or burnt to Heather at least 48 hours prior to the assignment due date. Travel and phone are reimbursable. There is an expense report attached to this syllabus in Appendix C; all expenses must have accompanying receipts. Costs must be preapproved by your instructor. Costs for copying and binding assignments for the class and the client are preapproved.

4. Presentation - Each team will present its report at least twice, first to the class and then to the client. If chosen as one of the three winning presentations, your team will give the presentation three times. See schedule for timing.

The class presentation consists of a 15 minute talk and subsequent Q&A from the audience. Presentations that exceed 15 minutes will be cut off at 15 minutes and graded accordingly. Evaluation of all presentations is based on the form in Appendix A.

The classroom presentations are a competition. The three best presentations (as scored by your peers and instructors) will be presented at the final SBI reception dinner at the end of the semester. The SBI Dinner Reception is scheduled prior to the beginning of the semester. You and all clients are invited. The three winning teams will repeat their presentation during the reception. Also, as part of the reception, we will hand out a brochure summarizing each project for this semester. Each team has to provide a summary of its project. Further details are below in Appendix B.

You are responsible for arranging a client presentation date, time and location to follow your class presentation. If your presentation is confidential and you cannot present to the class, make sure to include your instructor in your presentation to the client for grading purposes. Make sure to discuss with your client what information you need to keep confidential and cannot divulge during the class presentation.
5. **Bi-Weekly Journals** – Throughout the semester, each student will turn in a one-page, single-spaced summary of their work on a bi-weekly basis. See schedule for due dates. The journals contain 5 labeled paragraphs containing the following content:

1. Data Sources - What new sources of information have been identified (books, journal or newspaper articles, websites, individuals/experts interviewed, etc.)
2. Insights - What new knowledge and insights regarding your project have been gained from these sources or elsewhere, what new conclusions have you drawn
3. Client Communication - What communication has occurred with the client
4. Group Dynamics - How your group is functioning.
5. Miscellaneous – Anything that wasn’t included in the above sections

All five topics have to be addressed in each journal. The journals will be graded based on detail, thoughtfulness, effort displayed in your work and writing style. Use these journals to reflect on your learning and aid your instructor in developing content for your weekly meetings. Journals are due Tuesdays by 5 p.m. according to the semester schedule. They must be turned in as an email attachment in MS Word.

Late assignments will be penalized with one letter grade if submitted within the next 24 hours after being late, but are not accepted later than that unless arrangements have been made with the instructor.

6. **Peer Evaluation** – Because strong teams are key to the success of these projects, your peer evaluation will carry heavy weight on your grade. Equal input is expected from each team member; cooperation and compromise are expected from everyone. A team member can be expelled at any time from a group based on a unanimous decision of the other team members and in agreement with the instructor. The expelled team member can either join another team or finish the project on his/her own.

Each team member will have the opportunity to rate the contributions of the other members. The evaluation is shown in Appendix H.

The peer evaluation is converted to a percentage. It will directly affect your grade as all group grades (plan, draft, report, presentation) will be averaged and multiplied with your peer evaluation to come to your project peer evaluation grade. For example, assume that the average of your group grades is 90 points and that your peer evaluation is 85%. Your peer evaluation grade is 90 * 85% = 76.5 pts. A peer evaluation score below 50% will be scored as a 0%.

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**VIII. CAREER DEVELOPMENT REQUIREMENT**

In compliance with the School of Business’s Career Services development plan for each student, as part of the SBI Program you are required to complete career services requirements as outlined in Appendix I. See the schedule for timelines and deadlines.

To get the credit, you have to;

1. create a Gant Chart with the activities that each group member will participate in
2. register with Career Services
3. complete the requirements as outlined in Appendix I
4. have each group member fill out a survey as outlined in Appendix I.
Simply doing these 4 activities will give the group an ‘A’ on this assignment. Each missed event reduces your grade by a letter grade.

When attending career services events, you may use the event for more than one class if you have this requirement in more than one class.

Registration for career services can be completed through Griz eRecruiting at http://www.umt.edu/career/recruiting/er.htm

IX. ACADEMIC INTEGRITY

Plagiarism, cheating, or any form of dishonesty will result in a failing grade for the semester. Make sure that you properly cite throughout all your reports all your sources of information so that they can be identified by the reader. **Using foot or endnotes is required.** All students need to be familiar with the Student Conduct Code. The Code is available for review online at http://www.umt.edu/SA/VPSA/index.cfm/page/1321
## COURSE TIMELINE

Class times: TR, 8:10–9:30

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Location</th>
<th>Assignment Due</th>
<th>Format for Assignment Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 22 (T)</td>
<td>Introductions, Review of Syllabus, Forms, etc.</td>
<td>GBB 119 Appendix K and L</td>
<td>Appendix K and L</td>
<td>In class – handwritten</td>
</tr>
<tr>
<td>Jan 24 (R)</td>
<td>Introduction of Projects/Clients and Students</td>
<td>GBB 119 Appendix J</td>
<td>Appendix J</td>
<td>In class – handwritten</td>
</tr>
<tr>
<td>Jan 29 (T)</td>
<td>Final Team Selection</td>
<td>GBB 119 Team members with client project</td>
<td>Team members with client project</td>
<td>In class – handwritten</td>
</tr>
<tr>
<td>Jan 31 (R)</td>
<td>Project Plan Development</td>
<td>Computer Lab – 2nd floor SOBA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb 4-6</td>
<td>Meet with client Prepare written needs of client</td>
<td>Client offices</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb 7 (R)</td>
<td>Group meeting with instructor</td>
<td>110 E. Broadway, 2nd Floor</td>
<td>Career Services Gant Chart</td>
<td>Email assignment to instructor prior to your group meeting. Bring hard copy to meeting as well.</td>
</tr>
<tr>
<td>Feb 12 (T)</td>
<td>No class</td>
<td></td>
<td>Journal 1</td>
<td>Email to instructor prior to 5 PM.</td>
</tr>
<tr>
<td>Feb 14 (R)</td>
<td>Group meeting with instructor</td>
<td>110 E. Broadway, 2nd Floor</td>
<td>Signed Project Proposal</td>
<td>Email unsigned proposal copy prior to class meeting; bring signed hardcopy to meeting</td>
</tr>
<tr>
<td>Feb 19 (T)</td>
<td>Plan Overview</td>
<td>GBB 119 Journal 2</td>
<td></td>
<td>Email to instructor prior to 5 PM.</td>
</tr>
<tr>
<td>Feb 21 (R)</td>
<td>Group meeting with instructor</td>
<td>110 E. Broadway, 2nd Floor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Activity</td>
<td>Location</td>
<td>Due</td>
<td>Notes</td>
</tr>
<tr>
<td>----------</td>
<td>-----------------------------------------------</td>
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<td>----------------------------------------------------------------------</td>
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<tr>
<td>Feb 26 (T)</td>
<td>Positioning Overview</td>
<td>GBB 119</td>
<td>Journal 3</td>
<td>Email to instructor prior to 5 PM.</td>
</tr>
<tr>
<td>Feb 28 (R)</td>
<td>Group meeting with instructor</td>
<td>110 E. Broadway, 2&lt;sup&gt;nd&lt;/sup&gt; Floor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mar 4 (T)</td>
<td>Financial Analysis</td>
<td>GBB 119</td>
<td>Journal 4</td>
<td>Email to instructor prior to 5 PM.</td>
</tr>
<tr>
<td>Mar 6 (R)</td>
<td>Group meeting with instructor</td>
<td>110 E. Broadway, 2&lt;sup&gt;nd&lt;/sup&gt; Floor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mar 11 (T)</td>
<td>No class</td>
<td></td>
<td>First Draft</td>
<td>Email to instructor prior to 5 PM.</td>
</tr>
<tr>
<td>Mar 13 (R)</td>
<td>Group meeting with instructor</td>
<td>110 E. Broadway, 2&lt;sup&gt;nd&lt;/sup&gt; Floor</td>
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<tr>
<td>Mar 18 (T)</td>
<td>No class</td>
<td></td>
<td>Journal 5</td>
<td>Email to instructor prior to 5 PM.</td>
</tr>
<tr>
<td>Mar 20 (R)</td>
<td>Group meeting with instructor</td>
<td>110 E. Broadway, 2&lt;sup&gt;nd&lt;/sup&gt; Floor</td>
<td>Brochure Summary Draft</td>
<td>Email to instructor prior to meeting</td>
</tr>
<tr>
<td>Mar 25 (T)</td>
<td>Spring Break</td>
<td></td>
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<td></td>
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<tr>
<td>Mar 27 (R)</td>
<td>Spring Break</td>
<td></td>
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<tr>
<td>Apr 1 (T)</td>
<td>No Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apr 3 (R)</td>
<td>Group meeting with instructor</td>
<td>110 E. Broadway, 2&lt;sup&gt;nd&lt;/sup&gt; Floor</td>
<td>Final Brochure</td>
<td>Email brochure summary with logo to instructor prior to meeting</td>
</tr>
<tr>
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<td></td>
<td>Summary with client signature</td>
<td>Bring client signed hard copy of brochure summary to instructor</td>
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<td></td>
<td></td>
<td>meeting</td>
</tr>
<tr>
<td>Apr 8 (T)</td>
<td>Presentation Prep</td>
<td>GBB 119</td>
<td>Journal 6 due</td>
<td>Email to instructor prior to 5 PM.</td>
</tr>
<tr>
<td>Apr 10 (R)</td>
<td>Group meeting with instructor</td>
<td>110 E. Broadway, 2&lt;sup&gt;nd&lt;/sup&gt; Floor</td>
<td>Presentation draft</td>
<td>Bring to meeting on a flash drive or email to instructor prior to</td>
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<td></td>
<td></td>
<td>meeting</td>
</tr>
<tr>
<td>Apr 15 (T)</td>
<td>Class Presentations: YOU MUST BE IN CLASS AND</td>
<td>GBB 119</td>
<td>Final report</td>
<td>Bring one bound copy of the final report to the class.</td>
</tr>
<tr>
<td></td>
<td>READY TO</td>
<td></td>
<td>Final presentation</td>
<td>Bring one disc of the presentation to the class.</td>
</tr>
<tr>
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<td></td>
<td></td>
<td>Presentation</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Class Presentations:</td>
<td>GBB 119</td>
<td>Final report</td>
<td>Final presentation</td>
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<tr>
<td>Apr 17 (R)</td>
<td><strong>PRESENT BY 8 AM – IF YOU ARE NOT READY AT 8 AM, YOU WILL RECEIVE A “0” ON YOUR PRESENTATION</strong></td>
<td></td>
<td>Email report and presentation to your instructor prior to class. Presentation Evaluations (Appendix G) due with each presentation.</td>
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<tr>
<td>Apr 22 (T)</td>
<td><strong>PRESENT BY 8 AM – IF YOU ARE NOT READY AT 8 AM, YOU WILL RECEIVE A “0” ON YOUR PRESENTATION</strong></td>
<td></td>
<td>Email report and presentation to your instructor prior to class. Presentation Evaluations (Appendix G) due with each presentation.</td>
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</tbody>
</table>

**Teams:**

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<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apr 24 (R)</td>
<td>Class Presentations: YOU MUST BE IN CLASS AND READY TO PRESENT BY 8 AM – IF YOU ARE NOT READY AT 8 AM, YOU WILL RECEIVE A “0” ON YOUR PRESENTATION</td>
<td>GBB 119</td>
<td>Final report Final presentation Presentation Evaluations Bring one bound copy of the final report to the class. Bring one disc of the presentation to the class. Email report and presentation to your instructor prior to class. Presentation Evaluations (Appendix G) due with each presentation.</td>
</tr>
<tr>
<td>Apr 29 (T)</td>
<td>Winners announced Presentation Review for dinner that evening SBI Dinner Reception, UC 330-333, 5:30-8:30 PM</td>
<td></td>
<td>Peer Evaluations (Appendix H) Instructor Evaluations Travel Vouchers Prepared in class, hand written. You can choose to email the peer evaluation to your instructor prior to 5 pm. All travel vouchers must be received per the instructions in the appendix by 5 pm.</td>
</tr>
</tbody>
</table>
APPENDIX A

EVALUATION OF GROUP PRESENTATIONS

Topic: ___________________________________________ Date: ____________________

Group Members: ____________________________________________________________________________________

* * * * * * The Presentation is worth 100 points, allocated as follows: * * * * * *

1. The presentation was delivered in an interesting manner (e.g., audio visual aids were used effectively to support/highlight main points; props were used effectively, etc.).

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Good</th>
<th>Satisfactory</th>
<th>Poor</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>(20-18)</td>
<td>(17-16)</td>
<td>(15-14)</td>
<td>(13-12)</td>
<td>(11 or less)</td>
</tr>
</tbody>
</table>

Points: ___

2. The presentation was professionally executed (e.g., presenters wore appropriate business attire, made frequent eye contact with the audience, exhibited enthusiasm for the topic, did not read their presentation or stumble for words, handled questions concisely and knowledgeably).

Points: ___

3. The presentation was clear and well organized and met the time requirements (e.g., appropriate introductions of team, topic, and overview of presentation; the sections of the presentation did not duplicate content; the presentation appeared as an integrated whole - not a series of individual reports).

Points: ___

4. The presentation provided sound, appropriate analysis and insights (e.g., all and only relevant information was provided, various forms of evidence were used, sound techniques of analysis were applied, appropriate business concepts and conventions were employed to find solutions and suggest ways of implementation).

Points: ___

5. Critical thinking was evident (the analysis, conclusions, and suggestions showed logically consistent thinking and were characterized by judging and synthesizing).

Points: ___

TOTAL POINTS: ________

Your Name: ___________________________________________
APPENDIX B

SBI DINNER RECEPTION BROCHURE

We will jointly prepare a booklet consisting of one paragraph summaries of this semester's SBI projects. These will be distributed at our end-of-semester reception during finals week.

Therefore each team has to draft and perfect a summary paragraph describing your project. You will:

- Submit a draft business summary to your instructor for review and editing. **The business summary must include a jpg or gif version of the client logo.**
- The edited copy will be returned to you with written suggestions (if any.)
- Take the revised version as hard copy to your client for their approval and signature.
- Submit the original, signed hard copy **AND** an electronic copy of the paragraph **AND** the logo (as email attachment or disk) to your instructor.

See the schedule for deadlines.

Below please find an example for a summary:

**Totally Twisted**

*German Pretzel Bakery... and more!*

**M O N T A N A**

**Team Members:** Tracey Spoonemore, Thea Variachak, Abe Wilson

**Client Contacts:** Volkmar and Jen von Sehlen

*Totally Twisted -German Pretzel Bakery... And More!* is a predominately organic German-style bakery. The company specializes in the creation of soft German pretzels, pretzel cheese sticks, German-style breads, cookies, and cakes for people who want healthy, yet authentic German baked items made with ingredients from local food producers. The bakery is located in a very small bakery facility in Victor, Montana. To keep up with growing demand, the owners must find a larger facility to bake and store their products. To increase sales to support the larger bakery, the owners must raise public knowledge of their goods. The two main goals of the company are to open a store-front bakery facility, and to expand their wholesale business with flash-freezing capabilities to increase sales to an amount that sustains the business and its employees. To help achieve these goals, *Totally-Twisted -German Pretzel Bakery...And More!* wanted our team to help develop a business plan and relocation guide for their business. The importance of opening the store-front location is to receive more exposure locally and to get the word out about their unique products. Furthermore, the entry into the Missoula bakery market will educate the public of German baked goods and create a desire for the products among people buying healthy and organic baked goods from local bakeries. The team developed a comprehensive business plan that included a marketing, financial and operating plan. The team researched the bakery and commercial kitchen markets in Missoula and Lolo and integrated the potential market data with the existing business figures to develop an expansion plan.

**Client contact:** This SBI project summary will be distributed to all the attendees at our SBI Dinner Reception as well as any other interested parties. Please review and indicate your approval of this description.

Approval: ___________________________ Date: ___________________
Travel and phone charges are reimbursable if they are preapproved and follow the guidelines below. Printing, copying, and burning charges are not allowed because Heather Breckenridge will print, copy or burn CDs for you at the School of Business.

**Travel Information for Student Consultants**

**First, 2 to 3 days before each trip,** the driver and passenger(s) need to see Nancy Vatoussi in GBB 352 (ph. 243-4831) to fill out travel forms.

**Second,** you need to sign a *Travel Request and Authorization form,* which you can find on the next page.

**Third,** 3 days after travel, a *Travel Expense Voucher* must be signed. Only one voucher is completed per month for each traveler. At the end of each month the vouchers are sent to the Controller's Office for processing and check preparation. You can expect to receive your check approximately four weeks after the vouchers are submitted to the Controller's Office. Reimbursement will come to the driver of the vehicle. He/She will be responsible in reimbursing travelers for their meals.

1. The reimbursement rate for breakfast is $5.00, lunch $6.00, and dinner $12.00.
2. If your trip is 3 hours or less, no meal reimbursement is allowed.
3. The mileage rate paid is $.485 (48.5 cents) per mile for out of town trips.
4. No mileage is permitted for trips within Missoula.

**NOTE:** If you must cancel a trip, let Nancy know as soon as possible so the paperwork can be stopped.
# Travel Request and Authorization

**Traveler’s Name:**

**UM ID # (NOT SS#)** 790-

- [ ] Faculty
- [ ] Staff
- [ ] Student

**Home Address & Zip Code:**

**Departure (Date):** (Time):  
**Return (Date):** (Time):

**Destination (City, State, Country):**

**Purpose of Trip:**

Reimbursement Requested?  [ ] Yes  [ ] No  
Advance Requested?  [ ] Yes  [ ] No

## ESTIMATED EXPENDITURES:

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>AMOUNT</th>
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<tbody>
<tr>
<td>Air Fare (&lt;u&gt;must&lt;/u&gt; be paid for on a ProCard):</td>
<td>$</td>
</tr>
<tr>
<td>Private Vehicle (_________ miles @ .215/mi):</td>
<td>$</td>
</tr>
<tr>
<td>PC Rental Vehicle at destination:</td>
<td>$</td>
</tr>
<tr>
<td>Conference Registration:</td>
<td>$</td>
</tr>
<tr>
<td>PC Lodging $________/night (including tax)</td>
<td>$</td>
</tr>
</tbody>
</table>
| Meals (per diem):  
  *In-state rates B=$5, L=$6, D=$12; Out-of-state rates: B=$7, L=$11 ea., D=$18* | $ |
| Miscellaneous Expenses (parking, airport shuttle, cab, etc.): | $ |
| ESTIMATED TOTAL: | $ |

### Front Office Use

- Booked: ____________
- Itinerary to KS: ___ Copy to traveler:
- Motor Pool Vehicle (attach completed Vehicle Rental Request)
- Who’s doing registration? ____________
- Date registered: ____________
- Hotel name? ________________
- Phone Number: ________________
- Quote received: ____________

- B @ $______ = $______
- L @ $______ = $______
- D @ $______ = $______
- Other (describe): ____________

---

**Signatures and Approvals:**

**Traveler:**

**Date:**
<table>
<thead>
<tr>
<th>Chair or Program Director:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean:</td>
<td>Date:</td>
</tr>
</tbody>
</table>

Key:  a = can be included in Advance; p = can be paid for by ProCard; PC = must be paid for by ProCard
Per Diem requires 3 continuous hours within period and leave/return 1 hour before/after usual work hours
(B=midnight–10:00am / L=10:01am–3:00pm / D=3:01pm–midnight)
APPENDIX D: FORMAT FOR THE TITLE PAGE OF THE REPORT

A CONSULTING ANALYSIS  or  
(A BUSINESS PLAN)  
PREPARED  
FOR  

Business Title Here  
Business Address Here  
(Two Lines)  

Prepared by  
SUSAN A. BROWN  
JAMES B. DOE  
WILLIAM F. SMITH  

Under the Direction of:  Instructor Heidi DeArment and Name of Additional Instructor (if applicable)  

(Term, Year)  

The authors have prepared this plan and/or analysis in conjunction with a University of Montana, School of Business Administration course under the supervision of the Small Business Institute and for academic credit. The plan/analysis is based on a number of assumptions and therefore the authors are not able to guarantee the commercial viability of the plan, the accuracy of the data and the suitability of the conclusions from their analysis.
APPENDIX E

Hints for Writing an Executive Summary
(based on Lennon, 1993)

• Characteristics of a good summary:
  1. Contains the essential message(s) of the entire report
  2. Is written in a technical style appropriate for the reader
  3. Has independent meaning, i.e., can be understood without looking at the original
  4. Adds nothing to the original
  5. Conciseness, i.e., being brief and to the point, is vital, but not at the expense of clarity, accuracy, and comprehensives

• Writing a summary:
  1. Reread and underline the essential messages of your complete case analysis
  2. Reread the underlined material and cross out whatever does not advance the meaning
  3. Rewrite, including all essential material in the first draft, even it’s too long; you can trim later
  4. Edit this version, crossing out needless words and phrases, using numerals for numbers, and combining related ideas.
  5. Check your version against your original to verify that you have preserved the essential message
  6. Rewrite your summary, adding transitional expressions to reinforce the connection between related ideas and insure coherence
  7. Make sure all sentences are clear, concise, fluent, and written in correct English.

• While other summaries review only main points from a document or describe what the document covers, an executive summary reviews what the whole document contains. Readers expect the writer to help guide their thinking. Here, you intend to convince top management to decide to follow your suggestion.
APPENDIX F: Resource Guide

ADDITIONAL DATA SOURCES
The following data sources are available to supplement the above text.

- Tracy, How to Read a Financial Report, Wiley.
- UM Bureau of Business & Economic Research, www.bber.umt.edu
- UM Montana Business Connections, www.mbc.umt.edu
- UM Montana Manufacturing Center, www.mtmanufacturingcenter.com
- Montana Community Development Corporation, www.mtcdc.org
- UM Mansfield Library, www.lib.umt.edu

ADDITIONAL REFERENCES

- **Computers:** Computer workstations throughout the library provide access to the online catalog, databases, and full-text Journal Packages. Word processing, spreadsheets, and additional software programs are also available on the computers adjacent to the Information Center. All library computers print to laser printers located in the Copy Center. All machines are governed by our use policy. Browse a list of equipment available for use in the Mansfield Library.
- **Wireless Internet Access in the Mansfield Library**
- **Copy Center:** A full-service Copy Center, located on the main floor of the library, is available during all hours of operation.
- **Course Reserve Materials:** Access print materials and media on Traditional Reserve at the Information Center, or access reserve materials electronically on Electronic Reserve.
- **A Place to Study:** The Mansfield Library provides a wide variety of environments in which to study including a quiet study area and group study rooms. Group study rooms are available on a first-come, first-served basis and must be reserved.
- **Media Services:** Equipment such as video cassette recorders, laptop computers, and slide projectors may be reserved and checked out from Presentation Technology Services in the Social Science building.
- **Research Assistance:** Reference staff are available during all open hours to help you with your research. In addition to drop-in reference service, a Research Clinic is available for scheduled sessions with library staff by contacting Linder Schlang at (406)243-6866 or link to our Virtual Reference Service. Individual consultations can be arranged with subject librarians for large projects or difficult information needs. Subject librarians can provide research advice, assist with searching library databases, and make recommendations about the material you need for your work. Ask a reference librarian for referrals to the appropriate subject librarian. A self-guided tour is available at the Information Center.
- **Interlibrary Loan Borrowing and Document Delivery Services:** Check at the Information Center to get periodical articles not owned by the library delivered in 2 to 3 business days.
- Visit the Research Planner for guidance and time management strategies for your research paper.

For additional library information, go to http://www.lib.umt.edu/services/undergrad/default.htm or call 243-6866.

APPENDIX G: AMA Marketing Research Code of Ethics
ETHICAL NORMS AND VALUES FOR MARKETERS

Preamble
The American Marketing Association commits itself to promoting the highest standard of professional ethical norms and values for its members. Norms are established standards of conduct that are expected and maintained by society and/or professional organizations. Values represent the collective conception of what people find desirable, important and morally proper. Values serve as the criteria for evaluating the actions of others. Marketing practitioners must recognize that they not only serve their enterprises but also act as stewards of society in creating, facilitating and executing the efficient and effective transactions that are part of the greater economy. In this role, marketers should embrace the highest ethical norms of practicing professionals and the ethical values implied by their responsibility toward stakeholders (e.g., customers, employees, investors, channel members, regulators and the host community).

General Norms

1. Marketers must do no harm. This means doing work for which they are appropriately trained or experienced so that they can actively add value to their organizations and customers. It also means adhering to all applicable laws and regulations and embodying high ethical standards in the choices they make.

2. Marketers must foster trust in the marketing system. This means that products are appropriate for their intended and promoted uses. It requires that marketing communications about goods and services are not intentionally deceptive or misleading. It suggests building relationships that provide for the equitable adjustment and/or redress of customer grievances. It implies striving for good faith and fair dealing so as to contribute toward the efficacy of the exchange process.

3. Marketers must embrace, communicate and practice the fundamental ethical values that will improve consumer confidence in the integrity of the marketing exchange system. These basic values are intentionally aspirational and include honesty, responsibility, fairness, respect, openness and citizenship.

Ethical Values

Honesty— to be truthful and forthright in our dealings with customers and stakeholders.

- We will tell the truth in all situations and at all times.
- We will offer products of value that do what we claim in our communications.
- We will stand behind our products if they fail to deliver their claimed benefits.
- We will honor our explicit and implicit commitments and promises.

Responsibility—to accept the consequences of our marketing decisions and strategies.

- We will make strenuous efforts to serve the needs of our customers.
- We will avoid using coercion with all stakeholders.
- We will acknowledge the social obligations to stakeholders that come with increased marketing and economic power.
- We will recognize our special commitments to economically vulnerable segments of the market such as children, the elderly and others who may be substantially disadvantaged.

Fairness—to try to balance justly the needs of the buyer with the interests of the seller.
• We will represent our products in a clear way in selling, advertising and other forms of communication; this includes the avoidance of false, misleading and deceptive promotion.
• We will reject manipulations and sales tactics that harm customer trust.
• We will not engage in price fixing, predatory pricing, price gouging or “bait-and-switch” tactics.
• We will not knowingly participate in material conflicts of interest.

Respect—to acknowledge the basic human dignity of all stakeholders.

• We will value individual differences even as we avoid stereotyping customers or depicting demographic groups (e.g., gender, race, sexual orientation) in a negative or dehumanizing way in our promotions.
• We will listen to the needs of our customers and make all reasonable efforts to monitor and improve their satisfaction on an ongoing basis.
• We will make a special effort to understand suppliers, intermediaries and distributors from other cultures.
• We will appropriately acknowledge the contributions of others, such as consultants, employees and coworkers, to our marketing endeavors.

Openness—to create transparency in our marketing operations.

• We will strive to communicate clearly with all our constituencies.
• We will accept constructive criticism from our customers and other stakeholders.
• We will explain significant product or service risks, component substitutions or other foreseeable eventualities that could affect customers or their perception of the purchase decision.
• We will fully disclose list prices and terms of financing as well as available price deals and adjustments.

Citizenship—to fulfill the economic, legal, philanthropic and societal responsibilities that serve stakeholders in a strategic manner.

• We will strive to protect the natural environment in the execution of marketing campaigns.
• We will give back to the community through volunteerism and charitable donations.
• We will work to contribute to the overall betterment of marketing and its reputation.
• We will encourage supply chain members to ensure that trade is fair for all participants, including producers in developing countries.
APPENDIX H

TEAM MEMBER EVALUATION FORM

Your name:___________________________________________

Client/Project Name:_________________________________

Instructions: Please rate your fellow team members on the listed questions below on a scale of 0-10 with 10 meaning excellent (A). Use integers only.

<table>
<thead>
<tr>
<th>Member names, excluding yours</th>
<th>Quality of work (20%)</th>
<th>Attendance at team meetings (20%)</th>
<th>Carried fair share of team work (20%)</th>
<th>Met deadlines (20%)</th>
<th>Overall value to team (20%)</th>
<th>Total (multiply each value at left by 2)</th>
</tr>
</thead>
<tbody>
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**Bonus awards**: Place yourself in the role of your team's supervisor. Your team has been awarded a $7,500 bonus for having the project proposal accepted. Allocate this amount among your team members (excluding yourself) according to how much each deserves based on their overall contribution to the project. (Do not divide up the money evenly).

Below, please justify your decisions regarding evaluation and bonus distribution below the allocation (use a second page if necessary.)

Member name: __________________________ Amount in $: __________________________

______________________________ __________________________

______________________________ __________________________

______________________________ __________________________

______________________________ __________________________
Appendix I.

445 - SOBA Capstone Course Career Development Assignments – Spring ‘08

All assignments are required to be completed by Friday, April 18th @ 5:00pm

* REQUIRED * Participate in four of the activities listed below. Sign-in at all events for attendance.

- SOBA Workshop: Dress for Success – Tues., Feb. 5th @ 4:00-5:00pm in GBB 122
  [Info: http://www.business.umt.edu/career] Sign-in at program for attendance credit.

- SOBA Workshop on Networking – Thurs., Feb. 7th @ 5:30-6:30pm in GBB 122
  [Info: http://www.business.umt.edu/career] Sign-in at program for attendance credit.
  
  Note – on Wed., 3/19 from 6:30-8:00pm is the Spring Semester SOBA Student & Employer Networking Event in the 2nd Floor Atrium of the Gallagher Building. SOBA Juniors, Seniors & Grad Students are all invited. Come meet employers with internship & job opportunities!!! This is a voluntary attendance event & will not earn attendance credit for participating.

- SOBA Panel: Interviewing Tips from Employers - Mon., Feb. 11th @ 4:30-5:30pm in GBB 122
  [Info: http://www.business.umt.edu/career] Sign-in at program for attendance credit.

- UM Big Sky Career Fair – Wed., February 20th @ 9am-3pm in UC Ballroom
  Network & meet recruiters, see what they are looking for, learn about different occupations, & find out about job opportunities. For more information about preparing for the fair, a list of which employers will be attending the fair, & to find out more about them see: [http://www.business.umt.edu/career](http://www.business.umt.edu/career) BRING YOUR GRIZ CARD to sign-in at SOBA sign-in table for program attendance credit.

- SOBA Workshop: Dining Etiquette - Wed., 2/27 @ 4:00-5:00pm, GBB 122
  [Info: http://www.business.umt.edu/career] Sign-in at program for attendance credit.

- SOBA Exit Strategy Workshop, Wed., 4/2 @ 4:00-5:00pm, GBB 122
  [Info: http://www.business.umt.edu/career] Sign-in at program for attendance credit.

- Missoula Job Service’s Western Montana Premier Employment & Training Fair – Wed., April 16th at the Hilton Garden Inn @ 3:30-7:00pm For more information about preparing for the fair, a list of which employers will be attending the fair, & to find out more about them see: [http://www.business.umt.edu/career](http://www.business.umt.edu/career) BRING YOUR GRIZ CARD to sign-in at SOBA sign-in table for program attendance credit.

* REQUIRED * Complete Final Survey on Blackboard Web Site between April 7-18th by 5pm
### Appendix J: Weekly Schedule

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
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<tbody>
<tr>
<td>8:00 am</td>
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*To assist with coordination, please provide the times when you are in class, work, or otherwise unavailable. Indicate in the schedule the type of each activity in addition to blocking the hours. Also, indicate any hours as “Preferred Time” to meet.*

** List any days during this semester that you are not available at all: ____________________________
STANDARDS OF ETHICAL CONDUCT
FOR THE SBI PROGRAM (MGMT 445)

The SBI Director, students and faculty case supervisors are asked to adhere to the highest standards of professional and ethical conduct, and SHALL NOT:

* Hold vested interests in firms that maintain business relationships with a client;

* Accept personal gifts or gratuities from clients;

* Accept employment or remuneration from a client firm while still engaged in counseling (must allow 90-day grace period just prior to and just after counseling engagement to waive this requirement; the 90-day grace period requirement will not apply to students);

* Share current client data with others outside of the student team, case supervisor, and faculty advisors unless prior agreement with client exists. That is, treat all information relating to this project confidentially.

Violation of any of these standards by a student may result in a failing course grade and Student Conduct Code charges. Violation of these standards by a UM employee may result in disciplinary action.

Your name: ________________________________

Signature: ________________________________ Date: __/__/____
APPENDIX L

STUDENT CONSULTANT INFORMATION (MGMT 445)

Name:___________________________________________________________

Phone No. to reach you at:_____________________________________

E-mail (please write clearly):_______________________________________

Major:__________________________ Planned graduation date:__________

Current employer:__________________________ Hours worked per week:____

Summarize work experience:_____________________________________

______________________________________________________________

Student Consultant Profile:
A) Describe at least three strengths/assets, e.g., leadership, computer skills, highly organized, you will bring to your team (order them from the very strongest to the less strong):

1. ___________________________________________________________________

2. ___________________________________________________________________

3. ___________________________________________________________________

B) Describe at least three areas where you will seek the support of your teammates to help you improve (order them from the greatest need to the lesser need):

1. ___________________________________________________________________

2. ___________________________________________________________________
C) Describe at least three roles you expect to play as a team member (e.g., leader, presenter, writer, devil’s advocate, peace maker, analyst, researcher, manager):

1. 

2. 

3. 
Appendices
Writing Guidelines Distributed to Students in MGMT445 and 446

The following guidelines are distributed to all students enrolled in SoBA’s capstone courses. The development of these guidelines was led by MaryEllen Campbell and Caroline Simms, faculty members who have both earned master’s degrees in English and Communications.

TEMPLATE FOR BUSINESS SCHOOL REPORTS
(UM Mgmt&Mktg Dept.)

Formal Reports: (If assignment is more than 5 pages single/ 10 pages double spaced). Usually bound to protect pages and give the report a professional appearance. The title may appear through a cut-out window or may be applied with an adhesive label, or created with “flair” deemed appropriate to the audience, purpose and occasion.

1. Title Page
   1.1 The title should be in all caps, no underscoring and no quotation marks
   1.2 Put Presented to or Submitted to along with the name, title and organization of recipient.
   1.3 The author’s name(s)
   1.4 The date of submission
   1.5 Items 2-4 are typed in the usual combination of caps and small letters
   1.6 Do not number the title page

2. Table of Contents
   2.1 List headings of the report with page numbers
   2.2 Connect the list item to its page number with a line or a series of dots
   2.3 Type flush left margin
   2.4 Use Roman Numerals to number the pages prior to the introduction (i, ii, etc.)

3. List of Figures (if applicable)
   3.1 If there is room, these can be placed on the table of contents page
   3.2 For each figure or illustration, include a title and page number

4. Writing Conventions
   4.1 Use Chicago Style Sheet
   4.2 Use single space sentence; leave at least one inch margin on all sides
   4.3 Type flush left; leave white space between paragraphs
   4.4 Use descriptive headings and subheadings throughout. Enumerate headings. All headings and subheadings are listed in the Table of Contents.

5. Executive Summary (for longer reports)
   5.1 Summarize main points
5.2 Prepare an outline with headings (including purpose, findings, and conclusions/recommendations)
5.3 Follow the report sequence exactly
5.4 Note: The summary should be no longer than 10% of the length of the main body of the report. A one half-page summary is preferable for a five page paper.

6. Format (select appropriate titles for headlines)
   6.1 Introduction (where appropriate)
      6.1.1 Thesis
      6.1.2 Explanation of terms (if needed)
   6.2 Body (see writing conventions above)
   6.3 Conclusion and recommendations
      6.3.1 Conclusion is a summation of findings
      6.3.2 Recommendation is the next step that a person/organization should take.
   6.4 Appendix (optional)
      6.4.1 For supporting material, such as survey forms, copies of other reports, data tables, and related correspondence
      6.4.2 Pages are numbered Appendix 1 or A1, A2 …
      6.4.3 Cross-reference all appendices in the text
   6.5 Bibliography page
      6.5.1 List all sources cited in the work
      6.5.2 When all sources are consulted and are requested by your professor, list all sources alphabetically
      6.5.3 Use Chicago style (see below)

1. Short Report Format (fewer than 10 pages double spaced)
   1.1 Title page (see 1. above)
   1.2 Introduction (see 4. Writing Conventions above)
   1.3 Body
   1.4 Conclusion
   1.5 Sources cited
1. Chicago-Style Citations
The following paragraphs serve only as a basic guide to understanding the Chicago style. It is each student’s responsibility to use a complete guide to the Chicago style in order to note and cite all sources correctly. You can either buy one of these guides in the Bookstore or borrow one from the library.

Your research will lead you to various types of sources, and a style manual will spell out how to cite each specific type. The most important point here is that you do cite all borrowed information and cite it correctly, according to the Chicago style.

1.1 Footnotes and Endnotes
Chicago style of citation calls for either footnotes in the text of your paper or endnotes at the end, and a bibliography at the very end of the whole paper.

Both foot and endnotes “consist of numbered notes in the text of the paper that refer readers to notes with corresponding numbers either at the foot of the page (footnotes) or at the end of the paper (endnotes).”¹ For example, the source for the information on this page is cited in the footnotes below. To insert a footnote in Microsoft Word, go to Insert, and then select Footnote. Endnotes are identical to footnotes, except they are listed all together on their own page at the end of the paper, right before the bibliography. Each of your foot or endnotes will refer to a source that is listed in your bibliography. For that reason, your notes are abbreviations of the complete source information. Every note needs to include at least the author’s last name and the page number(s) from which you gathered your information.

When you cite the same source twice or more consecutively, you can abbreviate by using the term Ibid, which means ‘in the same place’ and the page number (see example below).

1.2 Bibliography
A bibliography should be included at the end of your report or paper and list every source that from which you gathered information, whether or not you actually cite all of those sources in your paper.

The bibliography should list each source in alphabetical order by the author’s last name or name of the sponsor. Each entry begins on the left margin, and if the entry is more than one line long, each additional line is indented one tab.

Below are only a few examples of bibliographical entries. There are many other kinds of sources of information, so it is necessary to refer to a style manual to help you cite them all correctly.

¹ Hacker, A Pocket Style Manual, 186.
Basic format for a book should include author, title, publisher and date of publication.

**Basic format for a book:**

Basic format for an article in a magazine should include author, title, publication name, date of publication, and page numbers.

**Basic format for an article in a magazine:**

Basic format for a website should include at minimum the author or sponsor, title of the site, and the URL. If you cannot find either an author or sponsor of a site, reevaluate that site’s authority and trustworthiness.

**Basic format for a website:**

2. **Avoiding Plagiarism**
All students and business people are responsible for understanding the definition and consequences of plagiarism. In her *Pocket Style Manual, 4th Edition*, Diana Hacker defines plagiarism this way:

> Three different acts are considered plagiarism: 1) failing to cite quotations and borrowed ideas, 2) failing to enclose borrowed language in quotation marks, and 3) failing to put summaries and paraphrases in your own words.²

In order to avoid plagiarizing and to be fair and honest in your writing, you need to cite every instance you borrow language and/or ideas from someone else’s work. There are several styles for doing this. For papers submitted to the University of Montana’s School of Business Administration, use the Chicago style.

3. **Bibliography**

² Ibid, 186.
Hints for Effective Writing, Grammar, and Usage

These suggestions arose out of my grading written assignments and research papers in various classes. They include common errors and suggestions for improving your writing. Remember that you must practice professional business writing skills to be able to use them.

I estimate that 75% of the points lost for inappropriate grammar, usage, and style could have been avoided if the student had carefully proofed his or her paper. Do not rely solely on spell-check and grammar-check functions of Word.

Proof your paper “cold” or after not having read it in 24 hours.

Grammar and Usage

1. Do not use contractions in business writing (can't, don't).
2. Where possible, use third person. Avoid using first person unless the assignment has you writing about a personal experience or opinion.
3. Commas and periods are always placed inside closing quotations. Even if you are only quoting one "word," place the comma or period inside the closing quotation.
4. In a list of phrases, make sure the form of the phrase is consistent. Instead of, "One would prefer living in Montana, to buy groceries at Albertson's, and a nice apartment," write, "One would prefer living in Montana, buying groceries at Albertson's, and renting a nice apartment."
5. Make sure your verbs match the plurality of the subject.
6. Always use complete sentences. This sounds so obvious, but I frequently see phrases that students intend to be sentences but lack the properties of a sentence (both a subject and predicate).
7. It is very common for students to be prolific with commas. Comma rules can be confusing. You are more likely to get into trouble with commas if you are writing conversationally or using sentences that are long and unorganized. Do not use commas to set off phrases unless (1) it is a phrase that could be eliminated from the sentence, or (2) the phrase contains a subject and predicate (is a full sentence on its own). An example of proper comma usage for (1) is "The students liked the class, especially the experience with computers." An example of proper comma usage for (2) is "The students liked the class, and they enjoyed their experience with computers." Note that in this second example, you are required to use a comma because it is a compound sentence. See #10 below. An example of improper comma usage is: "The students like the class, that included experience with computers."
8. Properly denote possessive nouns and pronouns. Often students leave apostrophes out or put them in the wrong place. The most common error: "The company announced who would be it's new CEO". "It's" always stands for "it is."
9. Use pronouns that are of the correct plurality. The most common error is "Microsoft released their earnings." (company=singular, their=plural pronoun) The correct way is "Microsoft released its earnings."
10. This is a very common improper usage of a comma: "We went out to eat at the Montana Club on Wednesday night, and watched the boxing matches at the Wilma." The comma is not necessary because the two phrases that it separates are NOT complete sentences. To correct this, either remove the comma or insert a subject in the second phrase ("We went.... night, and we watched ....").
Effective Writing

1. Use headings and subheadings. Not only will this force you to organize your thoughts, but it will also provide the reader information about where you are going in your paper.

2. Provide transitional paragraphs when switching between two marginally related topics. When switching between two closely related topics, transition in the first sentence of the new topic or the last sentence of the old topic.

3. Watch paragraph length. Often a long paragraph really contains discussion of several main ideas, so it could be broken into several shorter paragraphs.

4. Do not be too casual in your writing. Students tend to write like they speak, which can be very informal and "chatty." Professional business writing should not sound like a casual conversation when it is read. Casual writing carries an unintended aura of not being serious about your subject or assignment.

5. If the paper has been composed by more than one person, be sure the different writing styles are not blatant. If a paper is divided up in a group, designate one person to integrate the parts. This person will need to make changes to the other members' parts to make the paper more like his/her writing style throughout the paper.

6. Use charts, illustrations, tables, and figures as appropriate. Place them in the body of the paper at the appropriate point.

7. Properly introduce and summarize your topic with opening and closing paragraphs.

8. Designate your sources in some format preferred by your instructor. Some assignments and papers will have formal guidelines on footnoting, while others will not. Even if there is no formal requirement for footnotes, you should list your sources in a reference or bibliography list.

9. Do not plagiarize. When you are answering questions about a reading or summarizing a reading, it is tempting to copy and paste the words from the reading. If you do this without placing the words in quotations and footnoting the source, this is plagiarism. This is illegal and constitutes a violation of the Student Conduct Code. Reword the content in your own words. This shows thought and understanding of the topic.