

**MIDDLESEX COMMUNITY COLLEGE**

**ACADEMIC PROGRAM REVIEW  
SELF STUDY**

**FOR**

**BUSINESS ADMINISTRATION TRANSFER PROGRAM  
2014 – 2015**

**Program Review Committee:**

**Judith R. Hogan, Dean  
Business, Education and Public Service**

**Deborah Walsh, Assistant Dean  
Business, Entrepreneurship and Legal Studies**

**James W. Dottin, Department Chair  
Business Administration**

**Business Administration Faculty Contributors:**

**Robert Awkward  
Jeanne Canale  
Alfred Carosi  
Fred Colangelo  
James Duffy  
John Femia  
Stacie Hargis  
Diane Hudson  
Kimberly Morrissey  
Barbara Noonan  
Judith Orfao  
Kathryn Pupillo  
Ashli Ree  
Luciano Sappia  
Vikram Sharma  
Paul Therrien**

**Philosophy Contributor:  
Carlos Brocatto, Assistant Professor**

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MIDDLESEX COMMUNITY COLLEGE

Academic Program Review

Table of Contents

SECTION I	EXECUTIVE SUMMARY.....	5
SECTION II	PROGRAM DESCRIPTION:	
	FOCUS, GOALS, AND SELF STUDY QUESTIONS.....	8
SECTION III	PROGRAM MISSION, SUPPORT OF COLLEGE’S STRATEGIC PLAN, STUDENT LEARNING OUTCOMES (SLOs) AND ASSESSMENT .....	10
	SUPPORT OF COLLEGE’S STRATEGIC PLAN.....	10
	PROGRAM STUDENT LEARNING OUTCOMES.....	11
	CURRICULUM MAPPING.....	12
	ASSESSMENT.....	18
SECTION IV	PROGRAM SUPPORT FOR STUDENT SUCCESS FOR-HIGH IMPACT PRACTICE ...	21
	FIRST YEAR SEMINARDS AND EXPERIENCES.....	21
	EPORTFOLIOS .....	22
	SERVICE LEARNING, COMMUNITY-BASED LEARNING.....	23
	BUSINESS ETHICS – INSPIRING ETHICAL LEADERSHIP .....	24
	LEARNING COMMUNITIES.....	24
	INTERNSHIPS.....	24
	COURSES DESIGNATED FOR GEN ED.....	25
	ADJUNCT FACULTY INCLUSION IN ISLO DEVELOPMENT.....	25
	STUDENT ACCESS TO HIGH IMPACT PRACTICES.....	25
SECTION V	INSTITUTIONAL DATA.....	26
SECTION VI	EXTERNAL PERSPECTIVES.....	29
	NATIONAL BEST HIGH IMPACT PRACTICES.....	29
	e-PORTFOLIO PEDAGOGY.....	30

	CAPSTONE EXPERIENCES .....	30
	CREATIVE THINKING VALUE RUBRIC.....	31
	BUSINESS ETHICS .....	32
	BUSINESS CAPSTONE EXPERIENCES.....	33
	LABOR MARKET TRENDS.....	33
	BUSINESS TRANSFER PROGAMS.....	36
	BUSINESS ADMINISTRATION ADVISORY BOARD.....	40
	ADVISORY BOARD PROGRAM RECOMMENDATIONS.....	42
	EXTERNAL CONSULTANT.....	44
<b>SECTION VII</b>	<b>PROGRAM EVALUATION SUMMARY &amp; ACTION PLAN</b>	
	PROGRAM STRENGTHS.....	45
	PROGRAM ACTION PLAN.....	46
<b>TABLE 1</b>	<b>MCC STRATEGIC DIRECTIONS AND SUPPORTED BY BUSINESS PROGRAM ACTIVITIES.....</b>	<b>9</b>
<b>TABLE 2</b>	<b>OLD BUSINESS ADMINISTRATION TRANSFER PROGRAM PSLOs vs. NEW BUSINESS ADMINISTRATION TRANSFER PROGRAM PSLOs.....</b>	<b>10</b>
<b>TABLE 3</b>	<b>BUSINESS ADMINISTRATION TRANSFER PROGRAM CURRICULUM MAPPING BY FULLTIME FACULTY.....</b>	<b>11</b>
<b>TABLE 4</b>	<b>BUSINESS ADMINISTRATION TRANSFER PROGRAM: BUSINESS RETREAT CURRICULUM MAPPING BY FULLTIME &amp; ADJUNCT FACULTY.....</b>	<b>12</b>
<b>TABLE 5</b>	<b>PSLOs / COURSE SUPPORTIVING AT COMPETENCY LEVEL.....</b>	<b>13</b>
<b>TABLE 6</b>	<b>INSTITUTIONAL STUDENT LEARNING OUTCOMES (ISLOs).....</b>	<b>16</b>
<b>TABLE 7</b>	<b>CODED ARTIFACTS.....</b>	<b>18</b>
<b>TABLE 8</b>	<b>SUMMARY CRITICAL THINKING ARTIFACTS SCORING.....</b>	<b>20</b>
<b>TABLE 10</b>	<b>PROGRAM COMPLETION RATE FALL AND SPRING SEMESTERS.....</b>	<b>29</b>
<b>TABLE 11</b>	<b>BUREAU OF LABOR STATISTICS .....</b>	<b>35</b>
<b>TABLE 12</b>	<b>BUSINESS ADMINISTRATION TRANSFER PROGRAM COMPARISONS TO LOCAL COMMUNITY COLLEGES PROGRAMS.....</b>	<b>37</b>
<b>TABLE 13</b>	<b>BUSINESS ADMINISTRATION ADVISORY BOARD MEMBERS.....</b>	<b>41</b>

<b>TABLE 14</b>	<b>BUSINESS ADMINISTRATION ADVISORY BOARD RECOMMENDATIONS FOR 4 YEAR TRANSFER PROGRAMS IN BUSINESS.....</b>	<b>42</b>
<b>TABLE 15</b>	<b>BUSINESS ADMINISTRATION ACADEMIC MAP RECOMMENDATION.....</b>	<b>43</b>
<b>TABLE 16</b>	<b>PROGRAM ACTION PLAN .....</b>	<b>46</b>
<b>FIGURE 5.1</b>	<b>NEW STUDENT FTE ENROLLMENT TREND.....</b>	<b>26</b>
<b>FIGURE 5.2</b>	<b>FALL 2014 ENROLLMENT BY AGE GROUP.....</b>	<b>26</b>
<b>FIGURE 5.3</b>	<b>FALL 2014 ENROLLMENT BY GENDER .....</b>	<b>26</b>
<b>FIGURE 5.4</b>	<b>FALL 2014 ENTROLLMENT BY RACE .....</b>	<b>28</b>
<b>FIGURE 5.5</b>	<b>SUCCESSFUL COURSE COMPLETION RATES FALL 2014 .....</b>	<b>28</b>
<b>APPENDIX 1:</b>	<b>Business Administration Collaborative Critical Thinking Value Rubric.....</b>	<b>49</b>
<b>APPENDIX 2:</b>	<b>Critical Thinking Assessment Artifacts Scoring.....</b>	<b>50</b>
<b>APPENDIX 3:</b>	<b>Student Learning Outcomes – BUS 210 Principles of Management Syllabus.....</b>	<b>52</b>
<b>APPENDIX 4:</b>	<b>Student Learning Outcomes – BUS 210 Principles of Management Assignment: Global Management.....</b>	<b>62</b>
<b>APPENDIX 5:</b>	<b>Student Learning Outcomes – BUS 240 Principles of Marketing Syllabus.....</b>	<b>64</b>
<b>APPENDIX 6:</b>	<b>Student Learning Outcomes – BUS 240 Principles of Marketing Assignment: Group Project – Domestic Marketing Plan.....</b>	<b>73</b>
<b>APPENDIX 7:</b>	<b>Student Learning Outcomes – BUS 240 Principles of Marketing Assignment: Capstone Project – International Marketing Plan.....</b>	<b>78</b>
<b>APPENDIX 8:</b>	<b>Student Learning Outcomes – CAP 101 Computer Applications Assignment: Global Research.....</b>	<b>84</b>
<b>APPENDIX 9:</b>	<b>Student Learning Outcomes – BUS 221 Financial Accounting Assignment: Annual Report Project .....</b>	<b>90</b>
<b>REFERENCES.....</b>		<b>113</b>

## Middlesex Community College

### Academic Program Review

#### SECTION I: EXECUTIVE SUMMARY

Using background and/or contextual information please provide the reader with a summary of the program's **evolution, progress, and direction**. What is unique about this program? What does the **future** hold for the program? What are the major **issues** for this program? Connect us to your most recent program review where important, including information about previous findings, **improvements**, and **unfinished items**.

The faculty of the Business Administration Department is reflective of the diverse student population of traditional and adult learners we serve. A paradigm shift has taken place within the Business Administration Department through the valuing of student competencies as they relate to Student Learning Outcomes (SLOs) that are aligned with course assignments designed to provide evidence of students' attainment of the desired skill levels. Though collaborative departmental discussions, workshop retreat activities and MCC Assessment Day activities, faculty have made significant progress in redesigning their assignments to meet the new reality that we face as educators. Grant Wiggins, who championed the cause of this paradigm shift, states that "When outcomes matter, planning matters". Wiggins' pedagogical approach of the "Backward Design" was introduced to fulltime and adjunct faculty at the Business Administration Retreat in summer 2015 to assist us in developing curriculum and assessments that informs the achievement of our student learning outcomes. The "Backward Design" approach has proven to deepen students' understanding of the important ideas and improved students' skill level. By starting with the end in mind, faculty scaffolds their assignments backward as building blocks for students' understanding of the course content.

Underlying the Business Administration Transfer Program's outcomes are our efforts to provide students with learning experiences that are authentic and student centered. These experiences take place both in-and-out of the classroom, and include opportunities to participate in field trips and conferences, engage with guest speakers and clubs. As stated in one of our program student learning outcomes, "Students will demonstrate an ethical framework and value the dimensions of social responsibility for professional decision-making", the Business Administration Transfer Program's intent is to develop ethical leaders who possess competency levels in terms of intellectual, teambuilding, interpersonal, and presentation skills, skills that can be demonstrated in their ePortfolios.

#### *Our Evolution*

The department has developed course offerings and sequence course mapping by semester to be aligned seamlessly with 4 year college and university business programs. The development of our curriculum is intended to build student's confidence while preparing them for the rigors of the 4-year college experience. We have moved from an either/or approach of teaching knowledge vs. teaching skills. Also, we have increased the diversity of our faculty in terms of gender, race and ethnicity to better represent our diverse student population.

## *Our Direction*

The department has embraced a wide range of high impact practices including First Year Experience (FYE), ePortfolios, Service Learning, Business Ethics, Learning Communities, Diversity/Global Learning, and Internships. Though the department has implemented these practices, our program has yet to develop a clear distinctive identity that differentiates itself from similar programs at other community college both locally as well as nationally in any of these areas. However, given our resources, there is an opportunity to differentiate our program nationally by creating a “Center for Business Ethics & Corporate Responsibility” discussed in further detail on p. X.

The department recognizes the need to develop more capstone experiences within our program as well as a capstone experience of the Business Administration Transfer Program as a separate IDC course 1 credit capstone reflective experience via the ePortfolio pedagogy. The department is making steady progress to be more inclusive of adjunct faculty in the teaching and learning process. And, it recognizes that our adjunct faculty brings a wealth of experience to enrich the Business Administration Transfer Program.

### *OBSERVATIONS:*

- A number of fulltime faculty members currently utilize high impact active learning practices within their courses. Though these teaching practices have nationally proven to be beneficial for college students from diverse backgrounds, our department mirrors the national trend of being unsystematic in its integration of these practices within the program. Active learning is left to the discretion of the faculty member. Without a robust model in place to include in our ongoing instructional and curriculum development work, our faculty may or may not be aware of these practices, let alone be prepared to implement them.
- Table 4 - Curriculum Mapping by Fulltime and Adjunct Faculty indicates that the 200 level courses in the program do not consistently develop student competency levels when mapped against the department’s Program Student Learning Outcomes (PSLOs).
- Professional Development opportunities focusing assignment redesigns have proven to be beneficial for faculty meeting the PSLO objectives.
- The embracing of “Backward Design” as a curricular approach may result in more innovative and creative teaching by increasing faculty collaboration on course and program outcomes and assignments.
- A more intentionally structured program with guides students via the process in term of backward design assignments, speech course to develop presentation skills, business ethics to develop ethical and social leadership practices, study abroad focusing on business experiences, capstone IDS course e-Portfolio that is reflective of the students entire body of work in the program in order to make meaning of their experiences.

- MCC Institutional Research Data reveals that the Business Administration Transfer Program is 59% male. Literature suggests that male college students' expectations are different than females. This is a possible action research item for us to dig deeper into in order to retain male students to graduation (Wells, Seifert, Padgett, Park & Umbach, 2011; Wiens, 2006; Ewert, 2012; Marrs & Sigler, 2011; Archer, Pratt & Phillips, 2001).

## SECTION II: PROGRAM DESCRIPTION, FOCUS, GOALS, AND SELF STUDY QUESTIONS

The Business Administration Transfer Associate in Science degree program is designed to prepare students for transfer to bachelor's degree programs in business. This option gives students a valuable foundation in introductory business, accounting and management coursework, as well as a broad general education core curriculum. The transfer program also qualifies for the *MassTransfer Program of the Massachusetts Department of Higher Education* which guarantees its credits transferable to Massachusetts State Universities as well as the University of Massachusetts campuses. Academic advisors and transfer counselors work closely with students to plan course selections in accordance to the program's requirements and their intended bachelor's degree major with the transfer institution. The framework by which this program review is composed is listed below in terms of its focus, goals, and self-study questions.

### *Goal of Self-Study*

The goal of this self-study is to document the collaborative, reflective improvement work taken on by many of the FT members over the past year in order to generate the framework and focus of an ongoing action plan to move this work forward and to scale.

### *Self-Study Questions*

Instructional Outcomes, Standard of Practice and Planned Outcomes:

- *“How may we offer students maximum opportunities to develop competency appropriate for transferring sophomores to 4-year educational institutions that fulfill the expectations of the Business Transfer Program’s most important Program Student Learning Outcomes (PSLOs)?”*
- *“How does faculty design syllabi that embed well-constructed course outcomes to support students in achieving program outcomes?”*
- *“How do we get all the instructors who teach the same course to reach the same students’ outcome levels through the alignment of their course assignments to the course outcome; course outcomes to the program outcomes; and the program outcomes to institutional outcomes?”*
- *“And, how do we engage students in curricular, co-curricular and academic support activities to close the achievement gap of our diverse learners?”*

## SECTION III: PROGRAM MISSION, SUPPORT OF COLLEGE’S STRATEGIC PLAN AND STUDENT LEARNING OUTCOMES AND ASSESSMENT

### 1. Program Mission

The mission of the Business Administration Transfer Program is to systematically engage diverse learners in the principles and real world practices of business by offering students maximum opportunities to develop competency appropriate for transferring sophomores that fulfill the expectations of the program’s most important student learning outcomes leading to a seamless transition to a BS Degree Program at a 4-year educational institution.

### 2. Support of College’s Strategic Plan

**TABLE 1: MCC Strategic Directions and Supported by Business Program Activities**

<i>Improve access and advance student success by strengthening evidence-based practices and resource allocation.</i>	<i>Foster greater college engagement through improved communication, personal connections and collaborative partnerships.</i>	<i>Drive innovation, enrich community and broaden the learning experience for all by fulfilling our shared responsibility for diversity.</i>	<i>Empower all members of the college community to be educators, mentors, advocates and life-long learners.</i>	<i>Transform learning by integrating academic, workplace and global experiences to meet personal, professional and community needs.</i>	<i>Build partnerships that stimulate innovation and address the educational, social, and economic and workforce development needs of our communities.</i>
<ul style="list-style-type: none"> <li>• First Year Experience Course</li> <li>• ePortfolios Development</li> <li>• Service Learning Projects</li> </ul>	<ul style="list-style-type: none"> <li>• Advisory Board</li> <li>• DECA Club</li> <li>• Business Ethics Speaker &amp; Film Series Forum</li> </ul>	<ul style="list-style-type: none"> <li>• MCC Foundation Fellowship Study Abroad Opportunities (Short Course Study Abroad and Semester Study Abroad)</li> <li style="margin-left: 20px;">Belize</li> <li style="margin-left: 20px;">Cambodia</li> <li style="margin-left: 20px;">China</li> <li style="margin-left: 20px;">Costa Rica</li> <li style="margin-left: 20px;">England</li> <li style="margin-left: 20px;">India</li> <li style="margin-left: 20px;">Ireland</li> <li style="margin-left: 20px;">Peru</li> <li style="margin-left: 20px;">Russia</li> <li style="margin-left: 20px;">Scotland</li> <li style="margin-left: 20px;">Spain</li> <li style="margin-left: 20px;">Wales</li> </ul>	<ul style="list-style-type: none"> <li>Peer Business Ambassadors - Peer Mentors focusing on closing the achievement gap</li> </ul>	<ul style="list-style-type: none"> <li>ePortfolio Business Club</li> <li>Entrepreneurship Club</li> <li>DECA Club</li> <li>Accounting &amp; Finance Club</li> <li>Community Service Opportunities (Local &amp; Global)</li> </ul>	<ul style="list-style-type: none"> <li>• Greater Lowell Chamber of Commerce</li> <li>• Merrimack Chamber of Commerce</li> <li>• Bedford Chamber of Commerce</li> <li>• Career Centers – Woburn &amp; Cambridge</li> <li>• Small Business Assistance Center - Lowell</li> </ul>

### 3. Program Student Learning Outcomes (PSLOs):

Through the cumulative knowledge, skills, abilities and ways of thinking, students graduating with an Associate in Science in Business Administration Transfer Option will be able to:

- Use critical thinking and creative problem solving to analyze and develop solutions to real world problems.
- Define their career pathways within related fields.
- Demonstrate effective professional and technological business communication skills.

- Demonstrate their abilities to analyze global and cultural business practices.
- Articulate and use an ethical, socially responsible framework as a component of their professional decision-making.
- Demonstrate leadership, teambuilding and interpersonal skills that are essential to their professional success.

#### 4. Changes to Business Administration Student Learning Outcomes (PSLOs)

**TABLE 2: Old Business Administration Transfer PSLOs versus New Business Administration Transfer PSLOs**

<b>(OLD) Business Administration Transfer Program Student Learning Outcomes (PSLOs)</b>	<b>(NEW) Business Administration Transfer Program Student Learning Outcomes (PSLOs)</b>
Students graduating from the Associate in Science in Business Administration Transfer Option will:	Students graduating from the Associate in Science in Business Administration Transfer Option will:
Demonstrate knowledge of the practice of management, marketing and accounting and apply this information in the business environment. <b>(WHAT CAN THEY DO WITH THE KNOWLEDGE?)</b>	
Use critical thinking skills to appraise and evaluate business practices, including the use of quantities and qualitative techniques.	1. Use critical thinking and creative problem solving to analyze and develop solutions to real world problems.
Communicate and collaborate effectively in a business environment beginning with observation and listening skills culminating in oral and written proficiency and team based skills. Where applicable, students will be able to use technology to enhance their research to solve problems and inform their ideas and to present materials in a strong and cohesive format.	2. Demonstrate effective professional and technological business communication skills.
Recognize the presence of other cultures in the business world and identify various viewpoints based on cultural backgrounds. They will comprehend the need to have a global perspective when analyzing and planning in a global business environment. <b>(HOW WOULD YOU KNOW?)</b>	3. Demonstrate their abilities to analyze global and cultural business practices.
Using moral and ethical frameworks, describe ways in which conflicts in values, and morals result in various consequences from their business decisions.	4. Articulate and use an ethical, socially responsible framework as a component of their professional decision-making.
Comprehend the rapid change taking place in the business environment and develop the ability to engage in ongoing professional development throughout their work life. <b>(HOW WOULD YOU KNOW?)</b>	5. Demonstrate leadership, teambuilding and interpersonal skills that are essential to their professional success.
	6. Define their career pathways within related fields.

5. Map the way in which your program currently provides opportunities for students to progress towards achievement of each Program Student Learning Outcome, by noting in which courses the outcomes are **Introduced (I)**, **Developed (D)**, and where students are expected to demonstrate **Competency (C)**.

**Note:**

- **This is an exercise to create a map of what “is”, not what “should be”. It is an opportunity for faculty teaching in your program to think about and come to consensus on which program learning outcomes their course(s) currently support, and to what degree. Once this map of “what is” has been created, as a group you can identify gaps that you want to address to better enable student achievement of your goals for their learning (see question 7 below).**
- **At the Competency level, PSLOs and ISLOs should be reflected within the course outcomes on all syllabi for that course.**

Curriculum Mapping of Business Administration Transfer Program / Progression of Students’ Opportunities to Achieve PSLOs by noting in which courses indicated the outcomes as being **Introduced (I)**, **Developed (D)**, or where students are expected to demonstrate **Competency (C)**. The Curriculum Mapping activity was conducted at the Spring 2015 Department Meeting. The fulltime faculty participants included James Dottin, Robert Awkward, Alfred Carosi, Fred Colangelo, Stacie Hargis, Barbara Noonan, Kathryn Pupillo, Ashli Ree, Luciano Sappia, and Vikram Sharma.

**TABLE 3: Business Administration Transfer Program Curriculum Mapping by Fulltime Faculty**

PSLO	ISLO Supported by PSLO	BUS 110	CAP 101	BUS 210	BUS 240	BUS 221	BUS 223
Use critical thinking and creative problem solving to analyze and develop solutions to real world problems.	Critical Thinking (CT)	4I 4D 3C	1I 1D	1I 4D	2I 1D 1C	1C	1C
Develop effective professional and technological business communication skills.	Written and Oral Communication (WC, OC)	3I 5D 2C	1I 3D 1C	1I 4D	2I 1D 1C	1D	1D
Demonstrate their abilities to analyze global and cultural business practices.	Multicultural/Global Literacy (MGL)	4I 5D	1I 2D	1I 4D 1C	2I 1D 1C	1I	1I
Articulate and use an ethical, socially responsible framework as a component of their professional decision-making.	Social Responsibility (SR)	4I 5D 1C		1I 4D	2I 2D	1I	1I
Develop leadership, teambuilding and interpersonal skills that are essential to their professional success.	Personal and Professional Development (PPD)	3I 2D	1I 2D 1C	1I 3D	2I 1D 1C	1I	1D
Define their career pathways within related fields.	PPD	4I	2I 1C	3I	2I 1D	1D	C=1
Transfer to BS programs in related fields and successfully complete a bachelor level degree.	PPD	2I 2D	2I	1I 1D 1C	2D 1C	1D	C=1

**BUSINESS ADMINISTRATION WORKSHOP**

In order to continue the conversation and collaboration of Assessment Day on Critical Thinking, fulltime and adjunct faculty met in a half day workshop session in May 2015 to critique each other’s assignments and have them align to the Bloom Taxonomy categories to reach Critical Thinking Competency in our assignments. As each faculty member volunteered his/her assignment to be evaluated by faculty teaching the same course, recommendations were given to improve the assignment in order to intentionally have students reach higher order thinking of Bloom Taxonomy. Participants in the workshop included James Dottin, Robert Awkward, Stacie Hargis, Kathryn Pupillo, Luciano Sappia; and Adjunct Faculty: Jeanne Canale, Diane Hudson, Judith Orfao, and Paul Therrien.

The outcome of the mapping process in Table 3 was based on those faculty members’ representations of how they teach and perceive the obtainment of the PSLOs within each course. Table 3 reveals a wide range of results that indicates the value of further collaborative work in this area is needed in order to reach consensus on each course’s role in the development of the PSLOs. Students deserve equal opportunities to practice and develop competency with the outcomes our department has identified as most important for all of our business transfer graduates, regardless of course, section or instructor.

**BUSINESS ADMINISTRATION RETREAT RESULTS:**

In June 2015, the department held an all-day retreat on curriculum mapping and backward design methodology for fulltime and adjunct faculty to improve their assignments to match PSLOs. The backward design session was facilitated by Dr. James Nehring of the Graduate School of Education at the University of Massachusetts Lowell. Two separate pairs of faculty members by course discipline discussed then mapped the levels of PSLOs embedded in their courses to demonstrate students’ skill level by meeting the course learning objectives. The mapping of the core courses of the transfer program resulted in 79% at the Introductory and Developed levels, and only 21% at the Competency level. Faculty participants included James Dottin, Luciano Sappia, Kathryn Pupillo, Ashli Ree, and Robert Awkward; and Adjunct Faculty included James Duffy, Diane Hudson, Judith Orfao, and Paul Therrien.

**TABLE 4: Business Administration Transfer Program  
Business Administration Retreat  
Curriculum Mapping by Fulltime and Adjunct Faculty  
June 19, 2015**

PSLO	ISLO Supported by PSLO	BUS 110	CAP 101	BUS 210	BUS 240	BUS 221	BUS 223
Use critical thinking and creative problem solving to analyze and develop solutions to real world problems.	Critical Thinking (CT)	D	I / D	D/C	D	C	C
Develop effective professional and technological business communication skills.	Written and Oral Communication (WC, OC)	I	I / D	D	C	D	D
Demonstrate their abilities to analyze global and cultural business practices.	Multicultural/Global Literacy (MGL)	I / D	I / D	I / D	D	I	I

PSLO	ISLO Supported by PSLO	BUS 110	CAP 101	BUS 210	BUS 240	BUS 221	BUS 223
Articulate and use an ethical, socially responsible framework as a component of their professional decision-making.	Social Responsibility (SR)	I / D	I / D	D / C	D	D	D
Develop leadership, teambuilding and interpersonal skills that are essential to their professional success.	Personal and Professional Development (PPD)	I / D	I / D	D / C	C	D	D
Define their career pathways within related fields.	PPD	I	I / D	I / D	D	D	C
Transfer to BS programs in related fields and successfully complete a bachelor level degree.	PPD	I / D	I / D	D / C	D / C	D	C

As the result of the retreat’s mapping process, the Business Administration Curriculum Map suggests that in many cases, our core courses are not providing students consistent opportunity to demonstrate Competency Level (C) achievement of our PSLOs across and within our discipline. The core courses are providing opportunities for students to Develop (D) those competencies, but in many cases, we do not require them to “show us what they have learned how to do”. Also, when student demonstrations of Competency (C) are required, it is often only in selective sections of a course as opposed to across all sections of the course. The consensus among faculty (fulltime/adjunct) is to get students to competency level by first collaboratively discussing common course student outcomes then developing common course assignments for use by multiple sections of that course. The next step would involve collaboratively linking introductory gateway business courses assignments at the 100 course level to 200 level business courses assignments in a scaffolding methodology within and across course context. This effort is a work-in-progress and has yet to be completed with fulltime and adjunct faculty teaching the same course.

Referring back to your Curriculum Map for each PSLO, please provide at least one course-level student learning outcome (SLO) from syllabi from a wide range of sections for every course that supports that PSLO at a Competency level. If no such course-level SLOs are available, discuss how this will be addressed within the program. Also discuss how your program can or does ensure consistent opportunities among all sections of each Competency-level course for students to demonstrate their achievement of your program goals for student learning.

**TABLE 5: PSLO / INDIVIDUAL COURSE BY SECTION SUPPORTING AT COMPETENCY LEVEL**

PSLO	Course Supporting at Competency Level	Course SLO	What evidence of student achievement of this course SLO is used to determine that students have achieved this SLO? How is that evidence obtained? Please describe and include in Appendix examples of the prompts that generate this evidence (assignment/project descriptions, exam questions, etc.).
Demonstrate effective professional and technological business communication skills.	BUS 210	An understanding of topics such as planning, organizational environments and cultures, designing adaptive organizations, decision-making processes, influencing and communicating, and controlling.	Case Studies Capstone Project Problems Final Reflection Paper - These assignments will also build business writing and research skills (clear, concise and impactful). Students will

			be evaluated based on the clarity of writing; coverage of the topic; and writing mechanics, e.g., grammar, punctuation, word use, sentence structure, and spelling (Appendix 3).
Articulate and use an ethical, socially responsible framework as a component of their professional decision-making.	BUS 210	Apply management principles towards specific management challenges, global management and social responsibility and business ethics.	Films Case Studies Video Case Studies Research Problem Analysis Leadership Project Paper (Appendix 3)
Demonstrate their abilities to analyze global and cultural business practices.	BUS 210	Demonstrate analytical skills for identifying and solving practical management problems using traditional and on-line applications from a number of different theoretical perspectives.	Case Studies Global Research Project Paper Problem Analysis (Appendix 4)
Use critical thinking and creative problem solving to analyze and develop solutions to real world problems.	BUS 210	Students utilize their observations of management behavior in organizational situations, and integrate those experiences with the knowledge you have gained in the course.	At the end of the course, the student will be required to write a 5 - 10 page reflection paper about their learning experiences in this class. This paper may be conducted as (a) a research paper on a specific management topic utilizing external resources; or (b) a reflection of key learnings, takeaways, or epiphanies gained during the course; or (c) a plan for practice where the student will discuss how they intend to utilize the management concepts learned to improve practice in the workplace; or (d) a book review of a management book (Appendix 3).
Demonstrate effective professional and technological business communication skills.	BUS 210		Professional Development –The video case study and HP LIFE module assignments are intended to ensure that the student integrates these learnings into a professional experience and adds them to an academic quiver to use to support the acquisition of additional business knowledge (Appendix 3).
Demonstrate leadership, teambuilding and interpersonal skills that are essential to their professional success.	BUS 240	Students will develop a classroom environment that fosters open discussion and the exchange of diverse ideas.	Problem Based Learning / Prompts (Appendix 5)
Articulate and use an ethical, socially responsible framework as a component of their professional decision-making.	BUS 240	Students will develop the ability to differentiate social and ethical factors influencing business decisions on local and global communities	Professional Development Opportunities: Business Ethics Speaker & Film Series Leadership Film Series
Demonstrate effective professional and technological business communication skills.	BUS 240	Students will demonstrate the ability to identify, articulate and examine critical business concepts in terms of global cultures, economic systems, technological systems, international trade, business organizations, labor relations, management, marketing systems and financial systems.	Capstone Marketing Group Project (Paper 15 – 20 pp.) and PPT Oral Presentation (Appendix 6)
Demonstrate their abilities to analyze global and cultural business practices.	BUS 240	Students will demonstrate the ability to identify, articulate and examine critical business concepts in terms of global cultures, economic systems, technological systems, international trade, business organizations, labor relations, management, marketing systems and financial systems.	Capstone Global Marketing Individual Project (Paper 10 – 15 pp.) and PPT Oral Presentation (Appendix 7)
	BUS 240	Demonstrate an understanding of basic fundamentals of marketing. Define and employ basic marketing concepts Identify and express how marketing interacts and integrates with other	Video case study and HP LIFE module assignments are intended to ensure that the student integrates these learnings into a professional experience and adds them to an academic quiver to use to support the acquisition of

		aspects of business including management, accounting and economics. Identify and express your own observations of marketing initiatives and programs in organizational situations, and to integrate these experiences with knowledge you have gained in the course.	additional business knowledge (Appendix 5).
Demonstrate effective professional and technological business communication skills  Demonstrate leadership, teambuilding and interpersonal skills that are essential to their professional success.	BUS 210, BUS 240, BUS 221, BUS 223, CAP 101		Oral PPT – Presentation  5 p. paper on entrepreneurship  5 – 10 pp. paper on leadership  10 one-page papers summary business technology, current events, economic trends  Research Final Project – personal Finance, Questions, 401K, insurance, retirement income  Business Plan  Case Study Analysis – Various Business Situations  Writing weekly journals, discussion board reflection, final reflection paper  (Appendix 8)
Demonstrate effective professional and technological business communication skills	BUS 210		Collaborative Assignments Written & Oral Presentation  Weekly Written Critical Analysis (2 – 3 pp.)  Final Project – Reflection Paper on Course Topic Area (3 – 5 pp.)  Service Learning (Project) – Goes on transcript  Group work (Appendix 3)
Use critical thinking and creative problem solving to analyze and develop solutions to real world problems.	BUS 224 – Financial Accounting		Final Project - Financial Analysis, Ratios & Comparisons (Appendix 9)

Currently, there are no course-level student learning outcomes (SLO) from syllabi from a wide range of sections from an individual course. Although individual faculty members have identified course-level competency outcomes, the course-level outcomes are not across the spectrum of sections. This issue will be addressed in several ways:

- (1). All faculty of a particular course discipline will be invited to participate in a series of faculty course design workshops lead by an instructional design professional (internal or external) to guide faculty in crafting assignments, projects and assessments tools to help students obtain Competency Level in the SLOs.
- (2). Faculty will be encouraged to embed the appropriate Value Rubric for the specific SLO in the course design to guide faculty in intentionally assessing students for the achievement of the competency level.

- (3). Adequate writing assignments are being introduced within entry level course of BUS 110 – Introduction to Business. Too many of our students in our entry level classes have demonstrated an inability to write a clear paragraph at college level. This issue may be addressed by faculty working more closely with the MCC Writing Center to provide peer support to students to assist their competency level from introduction to development. Writing clear, concise and logical documentation is an essential skill for those in the business world. As well as the Advising Center ensuring that students are at least enrolled in the concurrent with Basic Writing/English Composition course as a prerequisite to BUS 110 Introduction to Business.
- (3). Student artifacts will be peer reviewed and group discussion with recommendations on further developing the course design to achieve student competency level.
- (4). Backward design assignments series of professional development workshops with full participation of fulltime and adjunct faculty.
- (5). In order to provide a seamless transition for our students, an ongoing review of our course sequencing should take place in order to successfully scaffold students’ experiences at MCC for the 4-year college/university business administration program. For example the Academic Map may reflect moving the two core introductory courses, BUS 110 – Introduction to Business be moved to the 2<sup>ND</sup> semester freshman year and CAP 101 - Microcomputer Applications be moved to the 1<sup>ST</sup> semester freshman year; and the 200 level courses such as BUS 210 – Principles of Management and BUS 240 – Principles of Marketing be moved to the 3 and/or 4<sup>th</sup> semester of the student’s sophomore year. Students can find it challenging taking 200 level courses without business experience and one semester of BUS 110 - Introduction to Business. This change will cause a shift in future semester course offerings. Thus, the department will study the affects the change will cause on the sequencing of the 200 level courses.
8. Referring back to your Curriculum Map, are there any ISLOs not supported to Competency levels within the program? If so, please describe how students in your program experience adequate opportunities to develop and achieve Competency with this (these) outcome(s), or please provide a plan for how this will be addressed.

**TABLE 6: INSTITUTIONAL STUDENT LEARNING OUTCOMES (ISLOs)**

<p><b>Written and Oral Communication</b> For example...</p> <ul style="list-style-type: none"> <li>• Written assignments</li> <li>• Oral presentations</li> <li>• Use of relevant information literacy skills</li> <li>• Effective use of technology</li> </ul>	<p><b>Critical Thinking</b> For example...</p> <ul style="list-style-type: none"> <li>• Analysis</li> <li>• Synthesis</li> <li>• Evaluation</li> <li>• Creative thinking</li> <li>• Development of logical conclusions</li> </ul>
<p><b>Quantitative Literacy</b> For example...</p> <ul style="list-style-type: none"> <li>• Interpretation</li> <li>• Representation</li> <li>• Calculation</li> <li>• Application/Analysis</li> <li>• Communication of quantitative information</li> </ul>	<p><b>Multicultural and Global Literacy</b> For example...</p> <ul style="list-style-type: none"> <li>• Intercultural knowledge</li> <li>• Global issues</li> <li>• Interactions that build diversity awareness</li> <li>• Diverse forms of creative expression</li> <li>• Aesthetic Appreciation</li> <li>• Historical, political, and economic perspective</li> </ul>
<p><b>Social Responsibility</b></p>	<p><b>Personal and Professional Development</b></p>

<p><i>For example...</i></p> <ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Civic engagement</li> <li>• Social justice</li> <li>• Ethical frameworks</li> <li>• Social policy frameworks</li> </ul>	<p><i>For example...</i></p> <ul style="list-style-type: none"> <li>• <i>Achievement of academic goals</i></li> <li>• <i>Career Readiness</i></li> <li>• <i>Self-Assessment</i></li> <li>• <i>Responsibility for learning and personal development</i></li> <li>• <i>Professionalism</i></li> <li>• <i>Leadership</i></li> <li>• <i>Wellness</i></li> <li>• <i>Collaboration</i></li> </ul>
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Through active participation in the ePortfolio Business Club, DECA Club, Finance & Accounting Club, Entrepreneurship Club, and Business Ethics speaker & Film Series, students in our program experience opportunities to develop and achieve Competency in the PSLOs (Critical Thinking, Written & Oral Communication, Multicultural & Global Literacy, Social Responsibility and Personal & Professional Development). Faculty promoting these clubs in their classrooms on both the Bedford and Lowell campuses and encouragement of students' engagement in these activities for professional growth may result in a higher participation rate. Other student opportunities include field trips to corporate, government and non-profit sites such as Enterprise Bank, the Federal Reserve Bank of Boston and, the Massachusetts Consumer Affairs Department. However, departmental plans must encompass a series of collaborative year-long workshops that develops consistent assignments that intentionally reach the SLOs across all sections of a specific course offering.

### **Assessment**

1. The Business Administration Department Assessment Project focused on Critical Thinking (CT) to assess student competency across business courses in the program.
2. For your assessment project, you have two choices:
  - a. Identify one or more cumulative assignments or capstone projects that significant numbers of students in your program complete to demonstrate their competency with **two or more** PSLOs. Use your curriculum map to identify the courses that require students to demonstrate these PSLOs at a **Competency** level.  
OR
  - b. Identify a PSLO that you want to assess student competency with, using your curriculum map to identify those courses (preferably **Competency** level for the PSLO, at a minimum **Developing** level) from which you will collect student products.

**NOTE:** *You will have the opportunity to conduct another programmatic assessment project at Assessment Day in 2016-17.*

Formulate a plan to collect full sets student work (artifacts) from above assignment(s)/project(s) that are representative (e.g. students who take courses on campuses, day and evening/weekend) of your program's graduates. From these full sets of student work, you will want to select a random sample that is still representative of your graduates but can be assessed by your faculty on Assessment Day. How will you evaluate the work – do you have, or will you need to create a rubric or set of criteria/checklist by which to evaluate student work? *(you do not need to respond in writing to this question – your response will be embedded in the next question - #10)*

**Questions to consider:**

- Is there a way to capture students’ perceptions of their learning with these assignments/projects to complement faculty evaluations of that learning?
- How can you maximize part-time faculty/staff involvement in this process?

To capture students’ perceptions of their learning, the department has identified the Critical Thinking (CT) PSLO that this program review focuses on. The PSLO CT states *“Use critical thinking and creative problem solving to analyze and develop solutions to real world problems”*.

A Critical Thinking (CT) Rubric based on the American Association of Colleges and Universities (AAC & U) Value Rubric has been modified by the faculty and agreed upon as the assessment tool (Appendix 1). The courses that students’ artifacts came from are BUS 110 – Introduction to Business, BUS 150 - Hospitality Management, BUS 171 – Fashion Retail Buying, BUS 210 – Principles of Management, BUS 240- Principles of Marketing, BUS 221 - Financial Accounting, and CAP 101 – Computer Applications.

A stratified random sample of students’ artifacts was used for the selection process. Adjunct faculty were asked to join the fulltime faculty as participants in the assessment process.

On May 18<sup>th</sup>, 2015, MCC Assessment Day, faculty participants consisted of Dean Judith Hogan; fulltime faculty James Dottin, Fred Colangelo, Stacie Hargis, Kimberly Morrissey, Kathryn Pupillo, Luciano Sappia, Vikram Sharma, and adjunct faculty member Jeanne Cannale.

**3. Describe your process (use the following prompts as helpful):**

- What did you do?

Class assignments were collected from 8 full time faculty members that represented 7 different courses. These assignments were sequenced in the order that was given to the Department Chair by the faculty members. There were no prior sorting of the assignments before all identifiable indicators of students and faculty names were removed to be used as unidentified artifacts.

- Which courses contributed artifacts?

The following courses contributed artifacts to the CT Assessment process. They included BUS 110 – Introduction to Business, BUS 150 - Hospitality Management, BUS 171 – Fashion Retail Buying, BUS 210 – Principles of Management, BUS 240- Principles of Marketing, BUS 221 - Financial Accounting, and CAP 101 – Computer Applications.

Each artifact was coded by a letter and number. Student names and any other identifying indicators were removed such as course designation, faculty name and campus location. Table 7 contains the codes used.

TABLE 7: CODED ARTIFACTS

A1 – A4	Principles of Management Group Case study Paper on “Is Smoking a Legitimate Individual Difference to Consider When Hiring People?”
A5 – A8	Hospitality* - Research Paper on Major Restaurant Franchises
A9 – A12	Fashion* - Research Project – Triple Bottom Line in Fashion Industry

A13 – A16	Principles of Marketing Term Project - Comprehensive Marketing Plan Applied to the Pet Consumer
A17 – A20	Principles of Management – Research Paper on Current Management Issues
A21 – A24	Computer Applications – Research Assignment on Conducting Business in a Foreign Country
A25 – A30	Financial Accounting - Corporate Financial Analysis Paper
A31 – A35	Introduction to Business – Global Strategies Paper of a Home Style Cookie Manufacturer
* Courses not in Business Transfer Program	

- How representative of your overall student population was this sample?

Artifacts were selected using a selected random sample of every 4<sup>th</sup>, 8<sup>th</sup>, 12<sup>th</sup> and 16<sup>th</sup> student assignment. If students courses assignments were 6 or less than, the 1<sup>st</sup> four students assignments were selected as in the case of Principles of Management group case study of 4 artifacts. These artifacts represented students work from both the Bedford and Lowell Campuses day students totaling 35 student artifacts that were scored by two different scorers of the same artifact that resulted in 35 artifacts scored 2 twice equaling 70 scores.

The business faculty collaborated to adapt the AAC & U Value Rubric (See Attached Exhibit: Critical Thinking Value Rubric). The three criteria collaboratively selected by the business department faculty were

(1) Criteria #1 - Explanation of Issues

(2) Criteria #2 - Evidence – Selecting and Using Information to Investigate a Point of View or Conclusion

(3) Criteria #3 - Student’s Position – Perspective, Thesis / Hypothesis

- Were the faculty doing the assessment work representative of your program/department?

The assessment work was representative of the Business Administration Transfer Program. There were 7 full time faculty and 2 adjunct faculty assessing / scoring students’ artifacts from the areas of accounting, computer applications, management and marketing.

1. What was your assessment question?

The assessment question asked, *“Is Critical Thinking being embedded within and across assignments of our core courses within the program?”*

#### **4. What Did You Learn?**

The Business Administration Department learned that the lack of prompting within our assignments resulted in lower students’ scores. If students were given appropriate assignment rubrics such as CT Value Rubric, it may contribute to increasing students’ scores by providing guided

expectations through the assignment process. Even though we evaluated well written papers, when compared to the CT Rubric, these papers fell short of reaching the goal of CT. While the intent of the assignments was focused on developing students’ critical thinking skills, these assignments were really focusing on teaching content. There lies the challenge for faculty to craft assignments that balances both the content and the critical thinking skills combined or have separate assignments to complement each other in order to reach competency level within the core courses. Table 8 highlights the fact that out of 70 artifacts scored, we consistently average within the 2.0 out of 4.0 range.

**TABLE 8: SUMMARY CRITICAL THINKING ARTIFACTS SCORING**

CRITICAL THINKING RUBRIC CRITERIA (Possible 4.00 Score)	Criteria #1 Explanation of Issues	Criteria #2 - Evidence	Criteria #3 – Student Position
Average Score (Total of 70 Artifacts) by Criteria	2.3	2.0	2.0

Appendix 2 – Critical Thinking Artifacts Scoring details the scoring by two separate scorers reaching an average score for each artifact separately scored based on the three assessment criteria of Explanation of Issues, Evidence / Point of View, and Student’s Position.

### 5. How Can You Use What You Learned?

If your results suggest that there is room for improvement, consider:

- Do students have adequate opportunities to develop **Competency** for these outcomes? Refer to the courses that support these outcomes at a **Developing** level on your curriculum map. In those courses, what are the ways in which students are working with and producing work for which they receive constructive feedback in preparation for their cumulative demonstration of **Competency** in later courses?

Until the majority of fulltime and adjunct business faculty are introduced to, taught and adopt new methods, such as backward designs techniques of assignment prompts and scaffolding that intentionally gain the desired outcome, opportunities to gain competency level at the course level will be limited. Regular professional development opportunities should be made available to collaboratively improve our craft as instructors to a diverse student population. Making our work transparent to each other and gaining feedback to improve our assignments to be in alignment with the value rubric, course outcomes, PSLOs and ISLOs would be of tremendous value to achieving this goal.

At the Business Administration Retreat, participants felt that the sessions went smoothly and learning occurred. For the faculty participants, the retreat was a very productive day of reflections, working and discussing new ideas and techniques with faculty who taught the same course to the same student population. The retreat was fulfilling our college’s major theme, “Everyone Teaches, Everyone Learns, Honoring the Past, Empowering the Future.”

- What are some possible improvement strategies? Please describe, then note as part of your action plan in **SECTION VII**, the Summary section of this document.

Schedule Business Retreats to continue the discussion and gain training in crafting our assignments. Prompting in the assignments may positively impact scores as well as providing students with the rubric that may guide their expectations of what is being asked of them.

Faculty learned that being transparent was a key to learning by expressing what we do not know and guiding us on how to get there. For many of us, this is a new pedagogy that is a new way of teaching to gain students' competency in the subject matter. We are more adept at delivery content than developing skill levels to be used beyond the classroom. The one major strategy for possible improvement is to have a continuous dialogue of assessment for the improvement of our craft. This strategy was used in Assessment Day activities in the spring 2015 semester. The activities consisted of the "Follow-up Assessment Workshop Critical Thinking Assignment Redesign."

The Business Administration Retreat engaged faculty in the discussion of course learning outcomes through methods such as speed dating that limits participants time to focus on the task at hand then move on to interact with other participants on the same topic to gain multiple perspectives. The fulltime and adjunct business faculty consisted of James Dottin, Robert Awkward, Stacie Hargis, Kathryn Pupillo, Luciano Sappia, Jeanne Canale, Diane Hudson, Judith Orfao, James Duffy and Paul Therrien.

#### **SECTION IV: PROGRAM SUPPORT FOR STUDENT SUCCESS – HIGH IMPACT EDUCATIONAL PRACTICES**

6. The following instructional practices and strategies have been described as high impact educational practices. Please discuss them in the context of your own program. Feel free to discuss additional high impact practices not mentioned here. Have you done any research within your program to determine the actual impact on student success that these or other high impact practices are having? If you are finding these high impact practices to be effective strategies for engaging students and increasing student success, how will you scale such practices up and out to support more students within your program? (This information should be noted as part of your action plan in **SECTION VII**, the Summary section of this document.

Through the use of innovative pedagogy, a paradigm shift has occurred in higher education and Middlesex Community College in particular. Engaging the new generation of diverse learners in social media and the instant response age will require the implementation of new pedagogy.

- **FIRST-YEAR SEMINARS AND EXPERIENCES**

As of Fall 2015, First Year Experience (FYE) will be a required course for all Business Transfer majors. FYE is the only course that addresses all of Middlesex Community College's Institutional Student Learning Outcomes (ISLOs). The Institutional Student Learning Outcomes consist of Written and Oral Communication, Critical Thinking, Quantitative Literacy, Multicultural and Global Literacy, Social Responsibility, and Personal and Professional Development. By taking this course at the beginning of the program, students will understand what the expected outcomes are when completing the program. Artifacts collected from both the classroom and from off-campus engagement activities will be assessed to consistently evaluate how well the students understand the ISLOs.

Students will have the option to take an FYE course linked to an Intro to Business course or linked to a General Education course. This allows the students to have the same instructor and same classmates for both courses. Research data suggests that the success rate is higher for students who interact more with the same faculty and the same students.

- **EPORTFOLIOS**

ePortfolios have provided a means for direct assessment of student development over the course of our transfer program. Through embedded assignments, students produce artifacts that are made visible to external viewers beyond the classroom. Currently, two ePortfolio software platforms are used within the department. Wordpress is used primarily for its web design feature within a computer classroom environment. Digication is a template that is used in a traditional classroom environment due to ease of use for students. As a reflective pedagogy, ePortfolios assist students' self-development and engagement by making meaningful connections of their learning.

At the AAEBL ePortfolio 2015 Conference in Boston, presenters James Dottin, Stacie Hargis and Maria Halepis shared the ePortfolio work being done within the business program and across the college. The presentation was entitled, "Encouraging Students to Develop E-Portfolios through Real World Contexts."



**MIDDLESEX**  
COMMUNITY COLLEGE

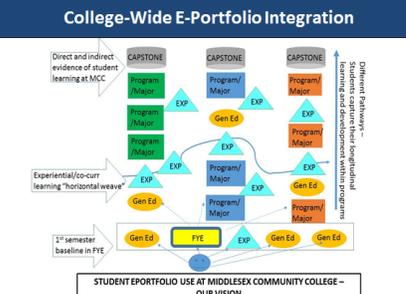
**"Encouraging Students to Develop E-Portfolios through Real World Contexts"**

*James Dottin, EdD; Stacie Hargis, MA; Maria Halepis, MA*

**Business Program ePortfolio Pedagogy & Practice**

- Building Departmental Culture
- Institutional, Program & Course Objectives
- Reflective Pedagogy & Professional Practice
- Deepening Student Learning & Real World Experiences
- Connectedness Within and Across Course Content & Co-Curricula Activities Vital for Student Engagement
- Student Development of Self

**College-Wide E-Portfolio Integration**



STUDENT EPORTFOLIO USE AT MIDDLESEX COMMUNITY COLLEGE – OUR VISION

**Other Programs at MCC**



**Specific Course Strategies**



**BUS 110 - Introduction to Business**

- Course Objectives
  - Real world integration of managerial issues for reflective decision making
  - Development of analytical skills through business case analysis
- Real World Context
  - Signature Assignments
  - Case Study & Leadership Reflections

**Progression of E-Portfolio Integration in the Business Program**

Institutional Objectives - Common Course Outcomes  
Program Assessment - AAC & U Value Rubrics  
Faculty Collaboration & Adoption  
Cross-Curriculum Integration & Student Development  
Student Professional Development  
Development of Capstone Course  
Linkage of Other Student Developed ePortfolio

First Year Experience  
Peer Tutoring  
Study Abroad

**College-Wide Support**



Are you proud of your ePortfolio?  
Share it in this year's ePortfolio Showcase

Peer Tutoring  
Students Helping Students

**■ Everyone Teaches ■ Everyone Learns ■**

## SERVICE LEARNING, COMMUNITY-BASED LEARNING

- ***Service Learning – A Real World Experience***

Service learning is an experience that brings students face to face with real world experiences. Business Administration faculty who are doing it now, are committed to continue embedding Service Learning into their courses, while other members of the Business faculty are exploring the adoption of this high impact practice. Two recent examples of how service-learning is employed in Business Administration program and course curriculum include Human Resource Management and Introduction to Hospitality. These courses engage the student by having them work with the business organizations to craft solutions to their real world problems.

For example, students to assist regional job centers to assist displaced workers; and analyzing reasons for layoffs and solving solutions of displaced workers; and It culminates with all students participating in a *Pay It Forward* event on the Bedford Campus. At that event, they will be working with the Bedford Rotary and several area businesses to package meals to send to Haiti. Service learning is offered only once during the academic year in these courses. There is a need to collaborative determine service learning opportunities throughout the academic year by selected faculty rotating this responsibility while working with the Service Learning Coordinator to plan adopting SL over several semesters.

- ***Student Responses to Their Service Learning Experience***

The following are selected examples of student's response to their experience in human resource management:

- *"I learned a lot about how social media is being used in today's business world. From Facebook to Twitter, Instagram to Pinterest – some I've never heard of – there was a lot to learn, all for a client that knew a lot less than I." Michael M.*
- *"The service learning project is almost as good as an internship. It's good because it teaches students to do research and improves their interpersonal skills at the same time." Jerome*
- *"Overall, I liked the idea of being able to get out of the classroom and see what else is out there. You can lecture a class and give them tests all you want. By being hands-on and conversing with others will leave you with memories of what you learned and information that you won't forget." Carmela*
- *"I can say I learned quite a bit...I was never the person to speak out and bring ideas. I was normally shy and kept to myself, but I found myself being more active in participating and conversing with other classmates. It was about being part of a team of others and working together." Michael S.*

- **BUSINESS ETHICS - INSPIRING ETHICAL LEADERSHIP**

Middlesex Community College's Business Administration Department maintains its standard of excellence in educating tomorrow's business leaders by emphasizing that a commitment to ethical business practices is a commitment to enriching local and global communities. Our programs are designed to help students recognize that ethical business practices protect businesses, employees and consumers from legal risks and damages while making a positive social impact by producing an increasingly sustainable world. Our goal is to inspire ethical leadership and collaboration with a commitment to creative enterprise and social responsibility by bridging the gap between ethical theory and ethical business practices in today's dynamic marketplace.

This goal is accomplished through embedding ethics within course modules throughout our program of study as well as recommending to student "Business Ethics" (ETH 102) which look more closely at the theoretical and practical application of ethical reasoning through case studies aimed at real world issues that arise in business practices. In collaboration with the Philosophy Department, we also offers students the opportunity to participate in the "Business Ethics Speaker and Film Series" funded by Middlesex Community College Foundation's Annual Fund that further promotes ethical business practices.

- **LEARNING COMMUNITIES**

Currently, the Business Administration Program offers student one Learning Community (LC) experience. The course LIC 103 – How to Succeed in Business consists of BUS 110 - Introduction to Business and ENG 101 - English Composition I a 6 credit course. By blending business writing with the themes presented in the theories and concepts of business, students learn research techniques that assist them in writing about these critical issues in an authoritative manner. Thus, this LC seeks to guide students in writing effectively for a variety of purposes and audiences which is a key factor to succeeding in business.

- **INTERNSHIPS**

The Business Administration Program at MCC offers a Business Internship Course, BUS 214. This course combines industry related field experience with relevant course work that allows students to explore employment issues. Currently, this course is not part of the Business Transfer Program as it is not transferrable to most four year programs, including UML, the primary transfer school for our students.

In Summer 2014, MCC formed an Internship Committee to explore the internship process at the college. Committee members were tasked with creating consistency between programs and processes regarding internships across disciplines. Committee representatives from the Business Program consisted of Dean Judith Hogan, Assistant Dean Deborah Walsh and Professor Kimberly Morrissey.

Currently, MCC students who transfer to UML are required to take an Internship course in their 3<sup>rd</sup> or 4<sup>th</sup> year. We are currently working with UML to negotiate transferability for BUS 214,

which would allow Business Transfer students to take this as a Business Elective within the program.

7. Have any of the courses in this program been designated as Gen Ed courses as a result of MCC's revision of General Education? If so, please discuss any program impact of this work.

- None of the Business Administration courses has been designated as Gen Ed courses as a result of MCC's revision of General Education criteria.

How are part-time faculty incorporated into the discussion of course strategies to support and assess ISLO development?

- Adjunct faculty has been included in the process through invitation to attend department meetings, surveys, assessment/assignment workshops, the business administration summer retreat, and one-on-one conversations with the department chair.

Are there teaching and learning strategies that have been found to be particularly effective?

- Teaching and learning strategies faculty members have found to be effective are case studies of actual businesses – problem solving, group work; problem solving and teamwork; and oral presentations with written communication and Power Point (PPT) skill development.

Have co-curricular activities been embedded in course content that have had an impact on student learning?

- Co-curricular activities have not been included in our courses. However, students are given incentives to participate in these activities as extra credit (i.e. the college guest speaker series, Financial & Accounting DECA Club, ePortfolio Business Club, and Business Ethics Speaker & Film Forums).

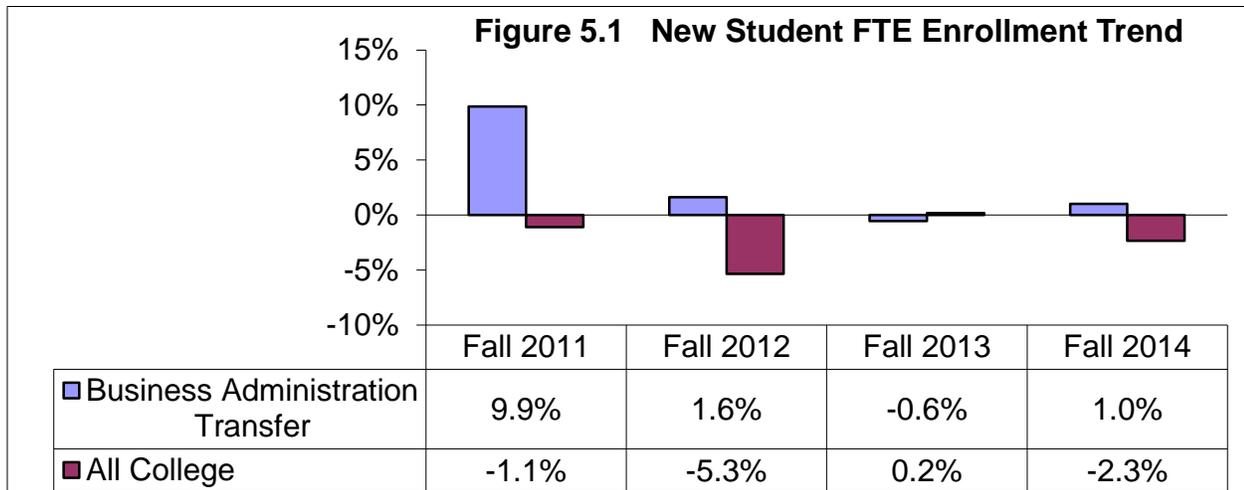
8. Do all students in your program, regardless of campus, day/evening, and/or modality of instruction, have equal access to the high impact practices and student success strategies that your program offers to at least some of its students? If not, discuss how you can increase **equity** for all students in your program. (Include in your action plan as appropriate.)

Students regardless of campus, day/evening/online attendance may not have equal access to the high impact practices and student success strategies that the program offers. Until we have a series of workshop that discuss the instructional design that engages students in high impact practices and evaluates faculty syllabi, there is an uncertainty as to the depth of these high impact practices being implemented throughout the program.

**SECTION V: INSTITUTIONAL DATA**

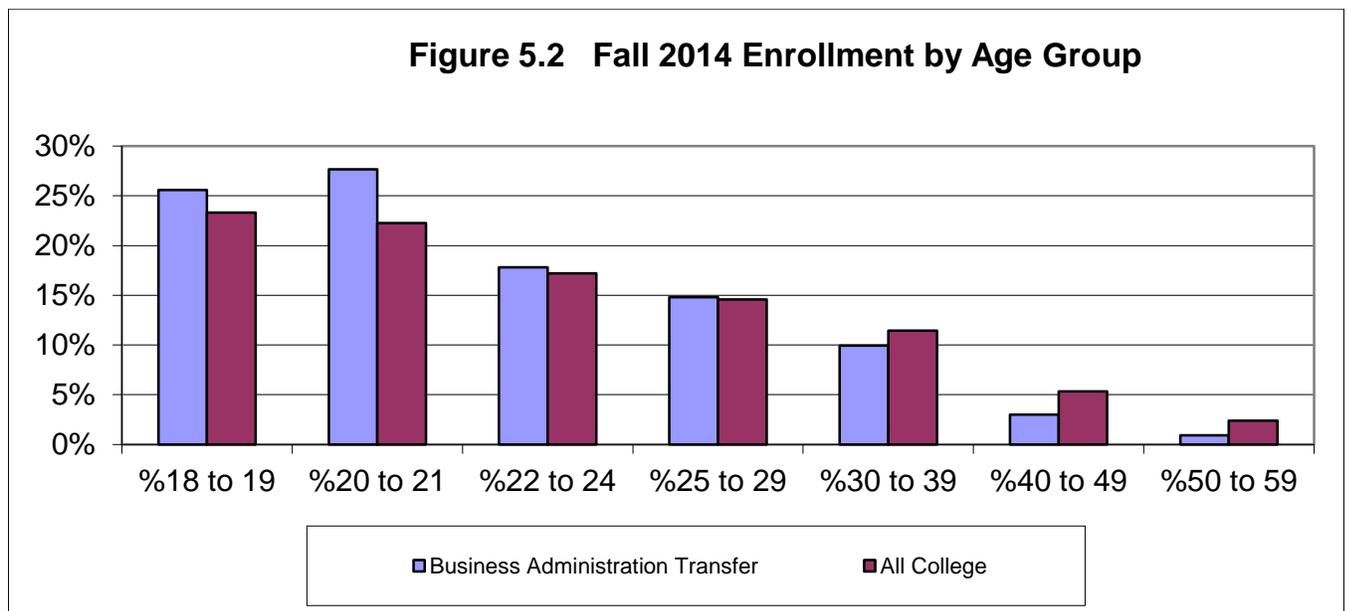
The Institutional Research Office of Middlesex Community College has provided the following institutional data packet in response to analyzing the Business Administration Program to the overall college’s statistics.

**9. Enrollment Trends.**



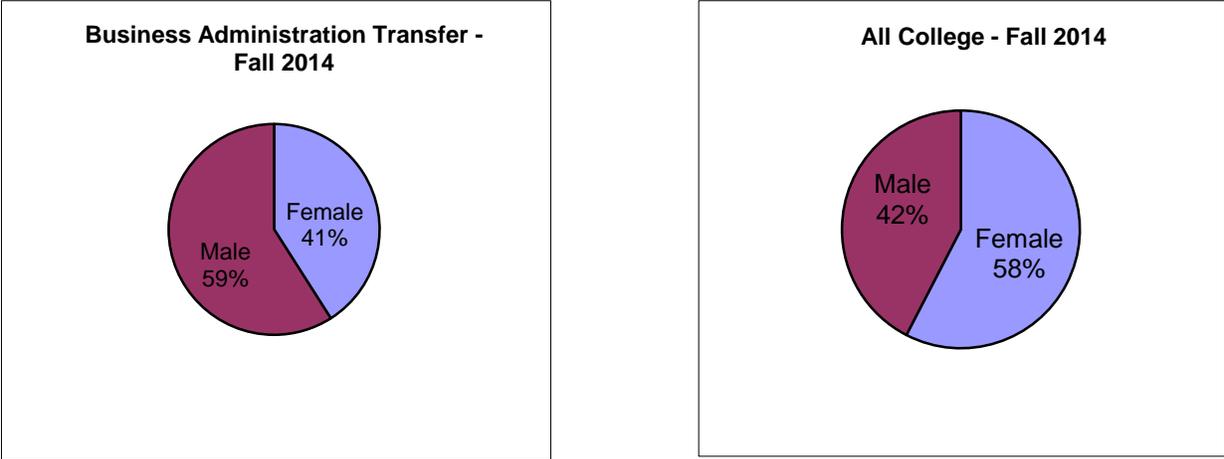
Starting in Fall 2012, the program experienced a significant decrease of 8.3% in the Full Time Equivalent Enrollment Trend. This decreasing trend continued in the following year out pacing the college wide numbers. However, there was a slight uptick in Fall 2014 by 1.6%. The program’s increase exceeded the college’s negative decline of -2.3%. This data suggests that the program is holding steady despite the declining FTE Enrollment college-wide.

**10. Demographic Enrollment Trends to College’s Demographics**



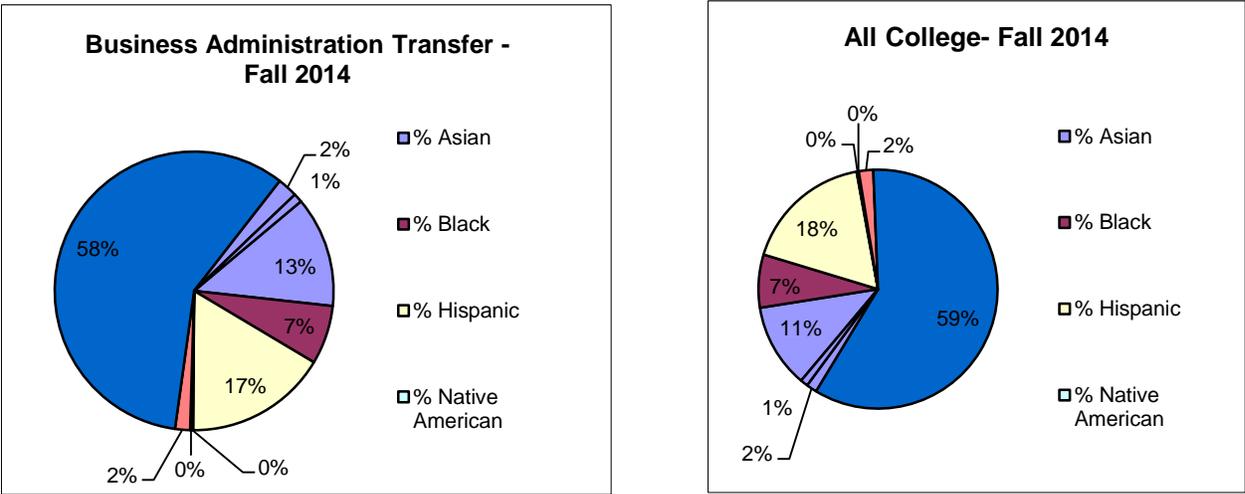
Fall 2014, Enrollment by Age Group - The program significantly exceeds the College's from age 18 - 21. From age 22 – 29 there is no significant difference, and from ages 30 – 59 the program lags behind the Colleges. The data suggest that largest number of enrollment are in the 18 – 21 grouping.

**Figure 5.3 Fall 2014 Enrollment by Gender**



The Fall 2014 data by gender - 59% Male versus 41% Female indicates that the Business Transfer Program is skewed towards the male gender. When compared to the college-wide gender breakdown, 58% Females versus 42% Males. The college is skewed towards the female gender.

**Figure 5.4 Fall 2014 Enrollment by Race**



In terms of race, the program mirrors the college's ethnic breakdown. Where Whites makeup 58% and , Hispanics 17%, Asians 13%, Blacks 7%, Native American 2% makeup

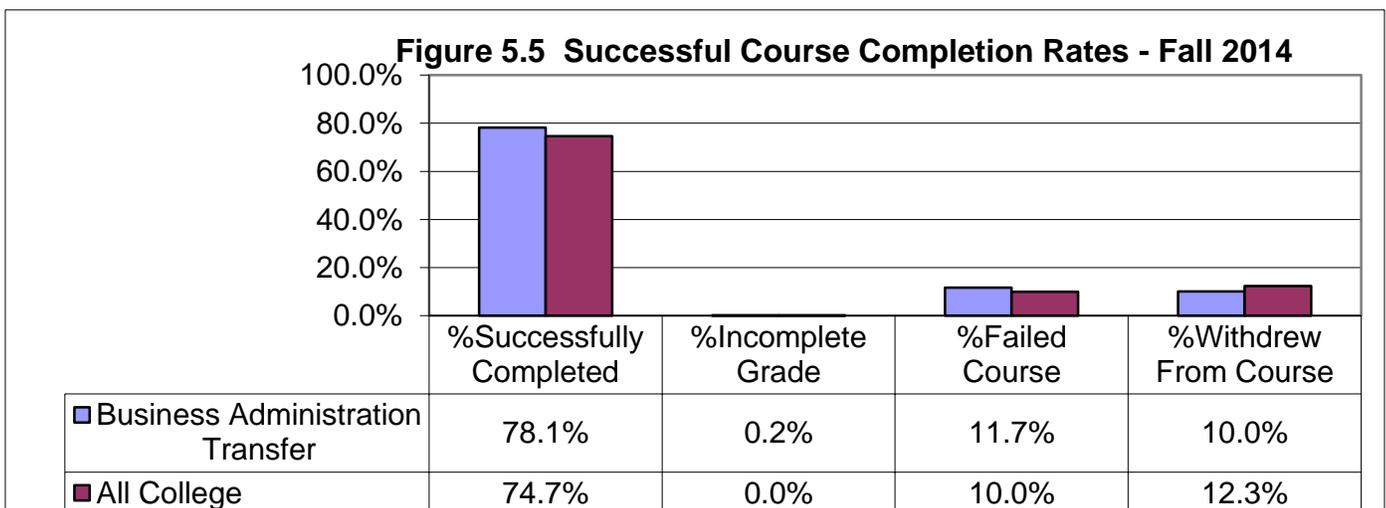
**11. Are there courses in your program with lower than desired completion rates? Discuss as necessary.**

The inter-campus enrollment continues to increase. This may be due in part to the “15 Credit to Finish” initiative push, the accessibility of bus transportation by the college between campuses both day and evening, and how some courses are selectively offered exclusively on one of the campuses.

The percentage of students enrolled in the day of 47.6 to 50.0% and evening 13.7% to 14.6%. Online enrollments makeup an increasing number of enrollments at the expense of evening courses. The online enrollment trends suggest that students have embraced that platform of learning due to time flexibility.

- New applications are still robust. There was a 3% change from Fall 2013 to Fall 2014 of 268 applications to 276 applications. Compared to college wide of -2.7%. Applications increased while the college’s applications went down. However, actual Head Count Enrollments went down by -6.6% or actuals 183 to 171. Change from Fall 2013 to Fall 2014, despite applications increasing versus college wide of -7.1% for the same period. Questions arise as to why are we not capturing the increase in students to the program.
- New Student Full Time Equivalent Enrollment Trend from 2012 to 2014 went from 123.7 to 126.26. From 2013 to 2014 change from previous year 1.0% compared to the college’s 2.3%.
- Business Administration Transfer headcount to Full Time Equivalency (FTE) Conversion Rate has consistently had a higher percentage from Fall 2012.
- Fall 2014 - 73.8% versus College’s 64.1%.

However, business program in terms of Head Count is steady and an attractive enrollment builder.



- Writing placement – 45% of students in Basic Writing. This is in conflict with student writing expectations. The Reading levels stayed the same, and Math in the developmental percentage decreased.

Are there courses in the program that have less than desired completion rates? Explain

- The majority of the courses in the program completion rate in either fall or spring semester are at or above 80% completion with the exception of the courses below:

**TABLE 10: PROGRAM COMPLETION RATE SPRING AND FALL SEMESTERS**

	<b>Spring 2014</b>	<b>Fall 2014</b>
BUS 110 - Introduction to Business	70.7%	73.7%
BUS 210 - Principles of Management		77.8%
BUS 240 – Principles of Marketing		77.6%
BUS 221 – Financial Accounting	69.0%	

- There are many possible reasons for the lower completions rate in these courses. One possible explanation is the fact these courses are demanding of students in the area of communication, writing skills, and problem solving. In response to the college’s initiatives, these areas are being focused on across the college. As faculty demand more of underprepared students with the expectation student can perform at a higher level is not mutual felt by students.
- Another possible reason is the lack of faculty engagement strategies that maintain students levels of interest and engagement throughout the semester, particularly to our male students and minority student learners.
- In addition, entering first year students are not used to college level work. They are held accountable for their work more than in a high school setting. The rigors of a college transferable course may be very challenging to them because faculty must maintain standards for students to be successful at the 4-year university.

**12. Business Administration Transfer Graduation GPA to College**

The number of graduates from Business Administration Transfer in Fall 2013 was 136 with an average GPA of 3.16 versus 1312 college wide graduate with an average GPA of 3.18. There is no significant difference in Grade Point Average between the Business Transfer graduate and student graduate college-wide graduates.

**SECTION VI: EXTERNAL PERSPECTIVES**

**13. NATIONAL BEST PRACTICE: It is as important for us to look beyond our walls as within our walls for new ideas.**

**NATIONAL BEST PRACTICE:** Based upon research on institutions beyond our geographical area that have exemplary programs or are known for their ‘best practices,’ discuss significant similarities or

*differences at MCC and identify areas that bear further exploration. If appropriate, discuss steps that MCC could take towards implementing these best practices in this program. Also if appropriate, include steps in action plan of Section VII, Summary.*

Based upon issue(s) you have identified as worthy of further exploration for program improvement, conduct some preliminary research, using the following sources (or others) as starting places:

- The Community College Research Center (CCRC): <http://ccrc.tc.columbia.edu/>

Guided Pathways suggests that coherent and clearly structured pathways are helping to improve student outcomes. Community colleges, as well as a number of 4-year colleges and universities, are instituting a 1<sup>st</sup> year summer bridge program that provides remedial instructions embedded into college credit coursework. Freshmen academic faculty coordinators work with faculty to implement high impact practices and build a sense of community among students and faculty at the program. Entering freshmen students that identify a specific major, such as business administration, may have a higher success rate of completion.

- The Research & Planning Group for California Community Colleges (RP Group): <http://www.rpgroup.org/>
- American Association for Colleges and Universities (AAC&U): [www.aacu.org](http://www.aacu.org)
- The Community College Survey of Student Engagement (CCSSE): [www.ccsse.org](http://www.ccsse.org)

Other resources might include work taking place at institutions known nationally for their best practice.

## **HIGH IMPACT PRACTICES:**

### ***ePortfolio Pedagogy***

There are a number of colleges and universities globally that have embraced the ePortfolio Pedagogy to enhance student learning. These schools include Salt Lake Community College (SLCC), CUNY LaGuardia Community College (<https://lagcc-cuny.digication.com>), Three Rivers CC, Queensborough CC, and Tunxis Community College ([tunxis.digication.com](http://tunxis.digication.com)).

. Business Administration Department have been the early innovative adopters leading the way in these areas. These colleges use ePortfolios in several different ways with the goal of providing students with a pathway to successful transfer to a 4-year university. At the Business Administration Department at Tunix Community College in Connecticut the focus is on career advancement, student learning and professional development ([rpgroup.org](http://rpgroup.org)).

### **Capstone Experiences**

LaGuardia Community College has been a pioneer in the area of ePortfolios. Since its initial exploration of ePortfolios in 2001, the ePortfolio initiative has greatly expanded in terms of significant growth college-wide. One of the unique qualities of our ePortfolio initiative is its use for both pedagogy and assessment as part of its college-wide “Program Assessment”. LaGuardia's ePortfolio has spearheaded a supportive network for campuses building their own ePortfolio initiatives, which

continues to grow. The LaGuardia faculty and staff make significant contributions to the field of ePortfolio as it develops throughout the U.S. and internationally <http://www.lagcc.cuny.edu/assessment/>.

By having students make connections with their courses and co-curricular artifacts from across the college program, while embedding either a **Capstone Experience** seminar including the ePortfolio as a central integrative component of the capstone educational experience. The CUNY system has also supported the ePortfolio **Leadership Colloquium** that provide opportunities for faculty and students to deepen their own work and engage in advanced discussions around ePortfolios. The ePortfolio and documentation of student learning and student retention have resulted in a number of national instructional innovation awards being awarded to these colleges. The same can be true for MCC. However, MCC does not have a capstone seminar course to make these connections utilizing the ePortfolio platform.

### **ePortfolio Faculty Mentors and ePortfolio Student Mentors**

In addition to the CUNY Initiatives, there are those in New England and beyond that are well worth noting for their exemplary work in ePortfolio development and implementation. They include Boston University, Bryant University Finance Department, Dartmouth College Instructional Design, Indiana University/Purdue, Loyola University Chicago, Northeastern University College of Professional Studies, Simmons College, St. Johns University, University of Massachusetts Boston, University of Massachusetts Dartmouth, and Virginia Tech.

Internationally, ePortfolios have been embraced in Canada, the United Kingdom, Australia and New Zealand. Leading universities in this area are Thompson Rivers University in Kamloops BC Canada. In the Business area such as Deakin University, Melbourne Australia Accounting/Finance Area. The focus of Deakin's ePortfolio Initiative is on evidence that demonstrates holistic learning, self – reflections and employability. Students professional capabilities are demonstrated through a ePortfolio Showcase, reflective writing and assessment via Blackboard assessment tools for online and F2F assignments

### **CRITICAL and CREATIVE THINKING VALUE RUBRIC ([value@aacu.org](mailto:value@aacu.org))**

The VALUE rubrics were developed by teams of faculty experts representing colleges and universities across the United States through a process that examined many existing campus rubrics and related documents for each learning outcome and incorporated additional feedback from faculty. The rubrics articulate fundamental criteria for each learning outcome, with performance descriptors demonstrating progressively more sophisticated levels of attainment. And adaptation of this rubric was used by the department in the development of our assignments used in the assessment day activity. The rubric was further proved of value in crafting our fall 2015 semester assignments and develop various learning prompts that will assist student in meeting learning objectives (Attachment #1 - Collaborative Critical Thinking Value Rubric, p. 54).

Faculty recognized that value rubrics help to inform their teaching as well as intentionally designing learning activities, lectures, assessment measurements to guide students in the attainment of the rubrics level of competency. The department has recognize the value of the critical and creative thinking rubric as an evaluative student learning tool to provide faculty with insight into the learning process and evidence of learning obtained by the student. The more we use the rubric not only a guide

for students but to faculty as well. As a result, faculty has engaged in constructive and meaningful discussions of our student learning outcomes.

## ***BUSINESS ETHICS***

### **Bentley University Center for Business Ethics (CBE)**

The Center for Business Ethics (CBE) at Bentley University is one of the world's leading research and educational institutes in the field of business ethics. It is also among the oldest, having been established in 1976. The Center for Business Ethics at Bentley University is a nonprofit educational and consulting organization whose vision is a world in which all businesses contribute positively to society through their ethically sound and responsible operations. CBE's mission is to promote a sense of ethics, civic engagement, social responsibility and sustainability through teaching, research, corporate and community relations, and our campus culture. The goal is the creation of organizational cultures that align effective business performance with ethical business conduct. CBE endeavors to do so by the application of expertise, research, education and a collaborative approach to disseminating best practices.

The Center for Business Ethics strives to make Bentley University's students more ethically sensitive and socially aware by:

- Connecting ethical thought and action
- Inspiring ethical leadership
- Enriching ethical knowledge
- Promoting ethical collaboration
- Supporting trans-disciplinary applied research
- Influencing curriculum development and pedagogical innovations intended
- Seeking external partnership organizations in pursuit of CBE's goals

The CBE further hosts:

#### ***State Street Global Business Ethics Symposium***

The Symposium follows from a multi-year partnership between Bentley University and the State Street Foundation in which international experts, corporate leaders, academics, media, and government representatives come together for an intensive one-day conference dedicated to exploring practical challenges in business ethics and the best practices for responding to them.

#### ***State Street Global Business Ethics Faculty Workshop***

Extending Bentley's partnership with the State Street Foundation, this workshop is intended for a small group of faculty members, drawn from around the world, with the purpose of helping faculty members from all fields to better integrate ethical reflection into every aspect of the business education curriculum.

The Center for Business Ethics at Bentley University is an educational program consistent with our PSLO and worthy of being emulated by the Business Department at MCC. The establishment of a Center for Business Ethics and Social Responsibility would focus on the issues of our community and commonwealth while bringing business, government and educational leaders to address those issues and possible solutions on our campus.

### ***BUSINESS CAPSTONE EXPERIENCES***

Nichols College in Dudley, MA exemplifies the use of capstone management and internship experiences within their 4-year business program as 1 credit hour courses. These seminar courses could be emulated within the business curriculum to provide business transfer student the opportunities advance management and internship experiences in the context of our IDS course format. The Nichols College business seminar courses are described below:

#### **Management Seminar - MGMT-482 3 Hours, 1 Semester**

The Management Seminar is the capstone course for a specialization in management. The seminar focuses on the study of management models, managerial ethics, and decision making. In addition, the seminar strives to synthesize certain core concepts and research findings presented in other prescribed management courses completed prior to enrollment in the seminar. Prerequisite: [MGMT-429](#) MGMT 429 Required

#### 1. Strategic Management - MGMT-485 3 Hours, 1 Semester

An interdisciplinary capstone course for business administration majors that is designed to integrate divergent but relevant business issues, interrelationships, and corporate and managerial agendas. Various stakeholders are identified and studied. Requires case analysis and an end-of-semester project dealing with a major strategic analysis and presentation of a Fortune 500 corporation. Prerequisite: [MGMT-365](#)

#### 2. Internship in Management - MGMT-490 3 Hours, 1 Semester

An intensive program of work experience with a business or corporation. Combines both experiential learning with traditional academic work through required term essay and presentation of internship results to an appropriate class. Internship course specifications and “learning contract” forms are available through the Office of Career Services. Students interested must be of junior or senior standing and have a 2.5 grade point average.

14. Identify **labor/market trends** that may impact current and future graduates of this program, based on input from advisory boards, focus group meetings with recent graduates, and national and regional data. Discuss changes to the program that these market trends may suggest. Some possible sources for such data include:
  - <http://online.onetcenter.org> (use “Find Occupations”)

- <http://lmi2.detma.org/lmi/FPLmiforms1.asp>
- <http://www.businessadministrationdegree.net/business-administration-job-outlook/>

### **Salaries For Business Administration Careers**

According to recent data from Salary.com and the United States Bureau of Labor Statistics, business administration jobs typically pay between \$41,000 and \$117,000 a year. Entry level salaries often start much lower, around \$30,000. Career income levels depend on the particular degree, job position, job responsibilities, past work experience, career industry, and other factors.

Salary.com reports annual salaries between \$41,000 and \$94,000 for office managers, with \$67,500 as the average. Supervisors generally earn between \$46,000 and \$84,000, or \$65,000 on average. Business development managers can earn considerably higher wages, typically in the \$60,000 to \$117,000 salary range, with an average income of \$88,500.

Administrative services managers, such as medical and health services managers and public administrators, earn even more money — up to \$136,000 a year. These positions usually require a masters in business administration or public administration.

Annual salaries for administrative assistants with two-year associate degrees range from \$29,000 to \$67,000, or \$48,000 on average. Employment in companies and enterprises, colleges and universities, and local governments generally pay better salaries than jobs in elementary and high schools and state government.

### **Job Outlook And Career Advancement**

The recent economic climate has produced job layoffs, salary cuts, and slower job growth in the business world. However, jobs are expected to grow at least as fast as average in the coming years. In fact, the United States Bureau of Labor Statistics projects a better than 10 percent job growth for careers between 2008 and 2018.

Certain industries, especially those that are experiencing growth, will likely create new jobs for people with college degrees. College graduates with bachelor's degrees and MBAs will have the edge over other candidates. America's growing industries include medicine and healthcare, social services, education, science, technology, technical services, and construction.

Professional advancement depends on a person's position and chosen career path. Some business management jobs provide opportunities for advancement through work experience and continuing education. Others require additional education, such as a master's degree, or additional industry credentials.

Generally speaking, the business world looks for skills in management, finance, policy development, employee relations, business writing, software, and leadership. Someone with bachelors or masters in business administration will have these skills. Combined with a growing economy, the business administration career future looks bright.

A quick search on Monster.Com shows the following results of positions within 100 miles of Boston:

- 11 Entry Level Accountant jobs in Boston, MA

- 13 Entry Level Analyst jobs in Boston, MA
- 11 Business Administration Entry Level jobs in Boston, MA
- 265 Marketing Entry Level jobs in Boston, MA
- 104 Recent College jobs in Boston, MA
- 406 BS Accounting jobs in Boston, MA matched your search
- 551 BS Finance jobs in Boston, MA matched your search
- 1,000+ Business Manager jobs in Boston, MA matched your search

This would seem to indicate that there are positions available for students completing their BS in Business Administration. Although the number of entry level jobs is highly competitive, the research suggests that there are ample opportunities for a successful career for graduates that obtain a Bachelor’s Degree.

According to the Bureau of Labor and Statistics Occupational Handbook, a sample of potential positions for a person with a Bachelor’s Degree is summarized as follows:

**TABLE 11: BUREAU OF LABOR AND STATISTICS**

	Financial Analysts	Accountants and Auditors	Administrative Services Managers	Advertising Promotions and Marketing Managers	Management Analysts	Financial Examiners	Personal Financial Advisors
<b>2012 Median Pay</b>	\$76,950 per year \$37.00 per hour	\$63,550 per year \$30.55 per hour	\$81,080 per year \$38.98 per hour	\$115,750 per year \$55.65 per hour	\$78,600 per year \$37.79 per hour	\$75,800 per year \$36.44 per hour	\$67,520 per year \$32.46 per hour
<b>Entry-Level Education</b>	Bachelor’s degree	Bachelor’s degree	Bachelor’s degree	Bachelor’s degree	Bachelor’s degree	Bachelor’s degree	Bachelor’s degree
<b>Work Experience in a Related Occupation</b>	None	None	Less than 5 years	Less than 5 years	Less than 5 years	None	None
<b>On-the-job Training</b>	None	None	None	None	None	Moderate-term on-the-job training	None
<b>Number of Jobs, 2012</b>	253,000	1,275,400	280,800	216,000	718,700	29,200	223,400
<b>Job Outlook, 2012-22</b>	16% (Faster than average)	13% (As fast as average)	12% (As fast as average)	12% (As fast as average)	19% (Faster than average)	6% (Slower than average)	27% (Much faster than average)
<b>Employment Change, 2012-22</b>	39,300	166,700	34,200	25,400	133,800	1,800	60,300

Source: <http://www.bls.gov/oooh/business-and-financial/financial-analysts.htm#tab-6>

The information above suggests that there are positions available for successful graduates of a Bachelor’s program, and employment numbers are growing and promising.

## **SECTION VI: EXTERNAL PERSPECTIVES**

**15. LOCAL:** *Based on a review of other college catalogs, list the colleges in our general area that have similar programs and comment on significant differences from the ones we currently offer that bear further exploration. If appropriate, discuss steps that MCC could take towards implementing these best practices in this program. Also if appropriate, include steps in action plan of Section VII, Summary.*

The MCC Business Transfer Program is compared with the programs with Northern Essex Community College – Haverhill, MA, North Shore Community College – Salem, MA and Bunker Hill Community College – Boston, MA.



### **Middlesex compared to Northern Essex Community College:**

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The Northern Essex Community College (NECC) business transfer program is much more prescriptive than the MCC. This was an intentional design on the part of MCC to allow student more flexibility in the course offerings. Since a significant number of students transfer from other Higher Ed institutions, leaving General Education electives open allows students to transfer in a greater number of credits. Students who can complete their program in a shorter amount of time are more likely to finish their program.

While both NECC and MCC programs satisfy the requirements for the MassTransfer Compact agreement, the NECC program requires more General Education credits while the MCC program includes more discipline specific requirements. Advisory Board members strongly recommended that including Principles of Management and Principles of Marketing as approved electives would ensure that the program was robust, and articulation agreements allow for both these courses to transfer. Business Law is also not required by the NECC program, but all faculty members agreed that it was very influential in undergraduate business education and it transfers to UMASS Lowell. Advisory Board members indicated that if a student does not transfer immediately, Marketing, Management, and Business Law are important and better prepare students to enter the job market immediately upon graduation.

Northern Essex also includes Introductory Accounting 1 and Introductory Accounting II in their program. These courses would most likely not transfer seamlessly into UMASS Lowell as 6 credits, and would most likely transfer as one course at UML. Reviewing the transferability of the Accounting courses with UML is a major goal of this program review so that will be a major focus of the department.

NECC includes an Integrated Computer Applications course that MCC does not have in the program. Faculty members have debated for quite some time about adding a second requirement of either Spreadsheet Applications or Database Applications to the program. This change has not been implemented in the past due to the transferability of the course, and due to the fact that at 64 credits, the program is already extremely difficult to complete in 2 years , so another course realistically could not be added to the program but substituted for another course. This will be addressed with UML as well.

Furthermore, NECC transfer program offers students internship opportunities at local businesses such as Raytheon, UPS and local non-profits as well as cooperative learning opportunities at a variety of local businesses.

### **Middlesex compared to North Shore Community College:**

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The North Shore Community College (NSCC) program is an Associate in Arts program while the MCC degree is an Associate in Science Program. NSCC business transfer

program includes many General Education electives. The program requires no computer applications course. It does allow a student to take three Business Directed courses, in addition to Financial and Managerial Accounting as compared with the MCC program which allows the student to take up to 5 Business courses in addition to Financial and Managerial Accounting.

The math requirements at North Shore (2 courses above MAT 140 Liberal Arts Math) are not as challenging as the program at MCC. Middlesex students are required to take Statistics and PreCalculus, which makes the program extremely difficult to complete, yet very robust. In fact, most of the students who do not complete the MCC Associate in Science degree fail due to the challenge of completing the math requirements. The North Shore program also has 2 additional Advanced Literature courses that the Middlesex program does not have.

The choice to offer an Associate in Science degree with more challenging math requirements as opposed to the Associates in Arts degree at North Shore certainly makes retention more difficult and completion rates that may be interpreted as not as strong as NSCC, but the MCC program most certainly is geared toward preparing students for success at the baccalaureate level by imposing demanding courses in the math arena.

The North Shore program satisfies the MassTransfer Compact through selective courses that fulfill the requirements.

### **Middlesex compared to Bunker Hill Community College**

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Bunker Hill Community College (BHCC) business transfer program offers a number of options based on concentration to fulfill the program requirements. These options include Concentrations in:

- Accounting
- Craft Entrepreneurship
- Entrepreneurship
- Finance
- Management
- Taxation
- Technical Business

Similar to NECC, BHCC requires an additional computer applications course within their program similar to NECC. One strength of BHCC program is their joint admission program agreements with Suffolk University and their degree completion program with Lesley University. Furthermore, their program also offers students internships and co-operative learning opportunities within the Capstone Option as a Management Seminar or with the Massachusetts Department of Revenue. BHCC business transfer program satisfies the MassTransfer Compact through selection of courses that fulfill the requirements.

**16. So what is your summary of this – what changes or possible changes do you think worthy of following up on? Include in your action plan.**

There are three areas that the comparative community colleges have an advantage in their business transfer programs:

- Capstone Options
- Capstone Internships Program
- Co-operative Learning Opportunities
- Joint Admission Agreements with Private 4-Year Universities
- Degree Completion Programs with Private 4-Year Universities

**17. ADVISORY BOARD:** Describe how you have incorporated your Advisory Board into this self-study, and provide examples of some of their input that you have found most valuable.

Through our quarterly meetings of the Business Administrative Advisory Board, Board Members from a cross section of industries including banking, high tech, manufacturing, accounting and education have been engaged in the program review process. The Boards recommendations are the following:

- The Board valued highly those students who had Cooperative Experience before entering the workforce. They recommended that the MCC should require all business to have a Cooperative Experience. In their opinion, there is no substitute for understanding the world of business and its protocols by experiencing the real world under a structured evaluative process.
- The Advisory Board also recognized that the MCC Business Administrative Department does not have a distinguishing brand that makes the program distinctive. Members recommended being more involved in the local chamber activities and crafting a social media strategy that emphasizes the strengths of the Business Administrative Program.
- Parents should be more heavily targeted at high school “Parent Nights.”
- Emphasis on affordability and transferability of the Business Administration Transfer Program as a guarantee pathway to the state universities
- The Advisory Board suggested department use as its the mission statement

*“We prepare students for their greater purpose.”*

**TABLE 13: BUSINESS ADMINISTRATION ADVISORY BOARD MEMBERS**

<b>Board Members</b>	<b>Organization Affiliation</b>	<b>Position/Title</b>
Jessica Aller	Jean D’Arc Credit Union	Financial Education Specialist
Aloysium Anaebonam	Breej Technologies	President
Robert ‘Ziggy’ Burns	Sage Bank	Community & Business Development Officer
Brent Delehey	Delehey Ventures, Inc.	President
James W. Dottin	Middlesex Community College Business Administration	Chair of Business Administration Advisory Board
Terrence B. Downes, Esq.	Middlesex Community College	Executive Director, Homeland Security
Jain Fain	Middlesex Community College	Transfer Counselor
Ralph M. Hammond	Rotary International District 7910 – Bedford, MA	Rotary Foundation Grant Coordinator
Carol Higgins	Summit Financial Corp. Tax Management Services	President
Judith R. Hogan	Middlesex Community College	Dean, Business, Education and Public Service
Patricia Kocsera	Sage Bank	Senior Vice-President Retail Banking
Sean Lydon	Lowell Savings Bank	Senior Vice-President Retail Banking & Marketing
Kimberly Morrissey	Middlesex Community College	Hospitality Coordinator
Dana Moss	TJX Companies	Zone Recruitment Manager
Luis Pedroso	Accutronics	President
Souvana Pouy	Cambodian Mutual Assistance Association	Executive Director
Deborah Walsh	Middlesex Community College	Assistant Dean Business, Entrepreneurship & Legal Studies

**Board Recommendations for Business Administration Transfer Program:**

Internships are an important business experience that students in the transfer program should be exposed too. Internships should be included in the first two years of college to prepare them for the professional business world.

Academic Maps course discussions noted that Speech and Business Ethics are vital courses in exposing students to the professional business world. Board members were unanimous in agreeing that ethical business practices are essential.

**TABLE 14: BUSINESS ADMINISTRATION ADVISORY BOARD RECOMMENDATIONS FOR 4 YEAR TRANSFER PROGRAMS IN BUSINESS**

1. Prepare students for a 4 year school experience
2. Expectations of much larger student population and class size
3. Self-discipline / Assertiveness
4. Control their future learning by understanding no one is going to do it for them
5. Less individualized attention
6. Time Management / Study time routine
7. Need to meet with the faculty of K-12 as well as the faculty of the higher education institutions
8. Do less “Hand Holding” at the later semesters to help acclimate the student for the “Bigger” classes or more stringent professors
9. Better prepare for 4-year school adjustment
10. Emphasize self-learning, good study habits and critical thinking skills
11. Students being their best advocate
12. Maybe an advanced level course that requires these skills
13. Get Basic skills covered
14. Adjust to a community service culture
15. Student given leadership opportunities
16. Students build a pride of success

17. Students become independent learners
18. Students develop a strong desire to achieve
19. Speech should be a required Humanities Course
20. If BUS 221 - Financial Accounting is mapped to 2 <sup>nd</sup> semester then CAP 101 - Computer Applications should be a milestone course in the 1 <sup>st</sup> semester

**TABLE 15: BUSINESS ADMINISTRATION ADVISORY BOARD  
ACADEMIC MAP RECOMMENDATIONS**

**BUSINESS ADMINISTRATION TRANSFER - ASSOCIATE IN SCIENCE**

<b>SEMESTER 1 - FALL</b>		<b>CREDITS</b>	<b>MILESTONE</b>
ENG 101	English Comp I	3	YES
Behavioral Science Elective*	*Recommended PSY 101 Intro to Psychology	3	
BUS 110	Introduction to Business	3	YES
CAP 101	Computer Applications	3	
MAT 177	Statistics	3	
IDS 101	First Year Experience	1	
	<b>TOTAL CREDITS</b>	<b>16</b>	

**2**

<b>SEMESTER 2 - SPRING</b>		<b>CREDITS</b>	<b>MILESTONE</b>
ENG 102	English Comp II	3	
BUS 221	Financial Accounting	4	
Business Elective	Business Elective	3	
Humanities Elective*	*Recommended ETH 102 Business Ethics	3	
IDS Elective (2)	IDS Electives (2)	2	
	<b>TOTAL CREDITS</b>	<b>15</b>	

**3**

<b>SEMESTER 3 - FALL</b>		<b>CREDITS</b>	<b>MILESTONE</b>
BUS 223	Managerial Accounting	3	
MAT 182	Precalculus for Business	3	
ECO 140	Principles of Macroeconomics	3	
Humanities Elective*	Humanities Elective	3	
Science Elective	Science Elective	3	
	<b>TOTAL CREDITS</b>	<b>15-16</b>	

<b>SEMESTER 4 - SPRING</b>		<b>CREDITS</b>	<b>MILESTONE</b>
LGL 102	Business Law	3	
ECO 150	Principles of Microeconomics	3	
Business Elective	Business Elective	3	
Humanities Elective	Humanities Elective	3	
Science Electives	Science Elective	3-4	
	<b>TOTAL CREDITS</b>	<b>15-16</b>	

**18. EXTERNAL CONSULTANT** (if applicable): After you have completed the self-study and received feedback from an external consultant, please summarize that feedback, in terms of program strengths, areas needing improvement, and useful recommendations. Include a copy of the external consultant's report in the Appendices for this program review, and incorporate relevant information into the Summary section on the next page.

## **SECTION VII: PROGRAM EVALUATION SUMMARY**

- A. Program Strengths  
(Bulleted List with reference to the question(s) numbers in the program review where this strength is explained.)
- The Blending of Senior and Junior Faculty Experiences
  - ePortfolio Business Course Strategies at Gateway Courses
  - Business Workshops / Retreat Inclusion of Fulltime and Adjunct Faculty in the Discussion
  - Faculty Sharing of Collaborative Assignment Redesign

- Assignment Design as follow up to Assessment work focusing on Critical and Creative Thinking and Problem
- Service Learning
- Academic Program Map – Business Administration Transfer Program:

B. Program Action Plan for Improvements, Budgetary Implications, Timelines. Program Review is both evaluative and forward-thinking, offering the opportunity to set future directions for the program.

The future direction of the Business Administration Transfer Program is based on the further development and implementation of the short-term and long-term goals below:

- Continuation of collaborative faculty work around curriculum development that is linked to consensus on course roles in the development of Business Transfer PSLOs. Increased opportunities for PT faculty to collaborate with FT faculty in the program's professional development work via use of Blackboard (Bb) online discussion board, online collaborative assignment design work and flexible F2F meetings.
- Development of a stronger Global component in the program
- Establishment of a Business Ethics and Social Responsibility Center made up of a planning team to research and develop a plan that implements the recommendations over time not to implement
- Development of Capstone courses and/or common capstone experiences for students completing the program
- Re-examination of course prerequisites and student pathways through courses in your program
- Faculty research on best practice to close achievement gaps and the development of a plan for implementing one or more recommended strategies
- Scaling student use of ePortfolios within the program
- Establishing external partnerships with corporate and non-profit entities that exposes students' to experiences beyond the classroom

**TABLE 16: BUSINESS ADMINISTRATION TRANSFER PROGRAM ACTION PLAN**

<b>Action Items</b> (Reference the question in the program review where this need is explained.)	<b>Proposed Plans for Improvement</b> (Bulleted list of suggestions.)	<b>Financial Needs to Make Improvements</b>	<b>Proposed Timelines for Implementation</b>
Continuation of collaborative faculty work around curriculum development that is linked to consensus on course roles in the development of Business Transfer PSLOs (Section IV – Instructional Practices and Strategies).	Full Day Retreat – Business Administration Fulltime and Adjunct Faculty Collaborate – guest speaker(s) from outside the college (regional/national) to address high impact practices embedded in assignment designs.	Faculty Stipends - Combination of 15 fulltime and adjunct faculty (\$150 x 15=\$2250)	Summer 2016
Continuation of collaborative faculty work around curriculum development that is linked to consensus on course roles in the development of Business Transfer PSLOs (Section IV – Instructional Practices and Strategies).	Faculty Development Workshops – Aligning our assignments to SLOs and the PSLOs to ISLOs via the Backward Design Model and redesigning them to be linked across course boundaries.	One ½ Day Workshop - Combination 10 fulltime and adjunct faculty members (\$150 x 10 = \$1,500)	Winter Break 2017
Development of a stronger Global component in the program	Development of Global/Diversity – cultures, different from their own. Course experiences will be augmented by experiential learning in a different community environment.	Course Development - Global Study Abroad (3 Credits Course) \$3,750	Fall 2017
Establishment of a Business Ethics and Social Responsibility Center (Section 15 – National Best Practices: Business Ethics Business Ethics)	Establishing a planning team of 3 people to research and plan the implementation of the recommendations to launch the Business Ethics and Social Responsibility Center	Faculty Stipends (\$1,500 x 3 faculty members) Total - \$4,500	Fall 2016

<p>Development of Capstone courses and/or common capstone experiences for students completing the program</p>	<p>Development of a Capstone IDS course based on ePortfolio Reflective Pedagogy of student making connections of their learning experiences from the courses taken within the program.</p>	<p>Course Development – IDS Capstone Seminar \$1,250 (1 Credit Course )</p>	<p>Spring 2017</p>
<p>Re-examination of course prerequisites and student pathways through courses in your program (Section VI – External Perspectives)</p>	<p>Review of Financial Accounting Course Credit of 4 is the exception to other colleges and universities in the area. Perform a review of the relevancy of this policy for today’s students based on the needs of the transferring 4 year schools.</p>	<p>Faculty review of Advisory Board Recommendations of course sequencing and pathways (5 faculty x \$250 = \$1250)</p>	<p>Fall 2016</p>
<p>Faculty research on best practice to close achievement gaps and the development of a plan for implementing one or more recommended strategies (Section 15 – National Best Practices)</p>	<p>Business Ambassadors – Closing the Achievement Gap – Peer Student Tutors targeting diverse students majoring in business.</p>	<p>Peer Student Tutors: Bedford Campus (5) and Lowell Campus (5) Campuses (10 x \$500 per semester = \$5,000)</p>	<p>Fall 2016</p>
<p>Faculty research on best practice to close achievement gaps and the development of a plan for implementing one or more recommended strategies (Section 15 – National Best Practices)</p>	<p>Development of a first year summer bridge program that provides remedial instructions embedded into college credit coursework.</p>	<p>Summer Coordinator (\$5,000) and 3 Faculty Members: Business, English and Math (\$3,500 x 3 = 10, 500)</p>	<p>Summer 2017</p>

Scaling student use of ePortfolios within the program (Section 15 – National Best Practices (ePortfolio Pedagogy)	ePortfolio Training embedded into the gateway courses BUS 110 – Introduction to Business and CAP 101 – Computer Applications as part of the curriculum requirements.	Fall/Spring Half Day Training Workshop of Business Administration Faculty -  (10 Fulltime/ Adjunct Faculty \$75 x 10 = \$750 x 2 = \$1,500 for 2 Fall and Spring semesters)	Fall 2016 / Spring 2017
Scaling student use of ePortfolios within the program (Section 15 – National Best Practices (ePortfolio Pedagogy)	College-wide ePortfolio Colloquium through Poster Sessions, Presentations and Pedagogy by Students and Faculty	Materials and refreshments (\$500)	Spring 2017
Scaling student use of ePortfolios within the program (Section 15 – National Best Practices (ePortfolio Pedagogy)	ePortfolio Regional Conference made up of NECCUM - Northeast Consortium of College and Universities in Massachusetts	Materials and refreshments (\$1,500)	Fall 2017
Establishing external partnerships with corporate and non-profit entities that exposes students' to experiences beyond the classroom	Development of strategies that identify and incorporate internships within the program curriculum as part of the MassTransfer Compact.		Spring 2017

APPENDIX 1:  
Business Administration Department  
Collaborative Critical Thinking Value Rubric



**CRITICAL THINKING VALUE RUBRIC**

for more information, please contact [value@aacu.org](mailto:value@aacu.org)

**Definition**

Critical thinking is a habit of mind characterized by the comprehensive exploration of issues, ideas, artifacts, and events before accepting or formulating an opinion or conclusion.

*Evaluators are encouraged to assign a zero to any work sample or collection of work that does not meet benchmark (cell one) level performance.*

	<b>Capstone</b> 4	<b>Milestones</b>		<b>Benchmark</b> 1
		3	2	
<b>Explanation of issues</b>	Issue/problem to be considered critically is stated clearly and described comprehensively, delivering all relevant information necessary for full understanding.	Issue/problem to be considered critically is stated, described, and clarified so that understanding is not seriously impeded by omissions.	Issue/problem to be considered critically is stated but description leaves some terms undefined, ambiguities unexplored, boundaries undetermined, and/or backgrounds unknown.	Issue/problem to be Considered critically is stated without clarification or description.
<b>Evidence</b> <i>Selecting and using information to investigate a point of view or conclusion</i>	Information is taken from source(s) with enough interpretation/evaluation to develop a comprehensive analysis or synthesis. Viewpoints of experts are questioned thoroughly.	Information is taken from source(s) with enough interpretation/evaluation to develop a coherent analysis or synthesis. Viewpoints of experts are subject to questioning.	Information is taken from source(s) with some interpretation/evaluation, but not enough to develop a coherent analysis or synthesis. Viewpoints of experts are taken as mostly fact, with little questioning.	Information is taken from source(s) without any interpretation/evaluation. Viewpoints of expert are taken as fact, without question.
<b>Student's position (perspective, thesis/hypothesis)</b>	Specific position (perspective, thesis/hypothesis) is imaginative, taking into account the complexities of an issue. Limits of position (perspective, thesis/hypothesis) are acknowledged. Others' points of view are synthesized within the student's position.	Specific position (perspective, thesis/hypothesis) takes into account the complexities of an issue. Others' points of view are acknowledged within position (perspective, thesis/hypothesis).	Specific position (perspective, thesis/hypothesis) acknowledges different sides of an issue.	Specific position (perspective, thesis / hypothesis) is stated, but is simplistic and obvious.

**APPENDIX 2:  
CRITICAL THINKING ASSESSMENT ARTIFACTS SCORING**

<b>Artifacts #</b>	<b>Criteria #1 Explanation of Issues</b>	<b>Criteria #2 Evidence / Point of View</b>	<b>Criteria #3 Student's Position</b>	<b>Scorer #1 Ave. Score</b>	<b>Scorer #2 Ave. Score</b>	<b>Artifacts Overall Ave. Score</b>
A1 - MGT	2	2	2	2	2	
A1 - MGT	2	2	2		2	2
A2 - MGT	3	3	2	2.7		
A2 - MGT	2	1	2		1.7	2.2
A3 - MGT	2	0	0	.7		
A3 - MGT	0	0	1		.3	.5
A4 - MGT	1	1	1	1		
A4 - MGT	2	2	2		2	1.5
A5 - HOS	2	2	2	2		
A5 - HOS	2	2	2		2	2
A6 - HOS	3	3	3	3		
A6 - HOS	2	2	1		1.7	2.3
A7 - HOS	3	2	2	2.3		
A7 - HOS	3	3	2		2.7	2.5
A8 - HOS	3	3	3	3		
A8 - HOS	2	2	2		2	2.5
A9 - MKT	3	3	3	3		
A9 - MKT	3	3	3		3	3
A10 - MKT	3	2	3	2.7		
A10 - MKT	1	3	2		2	2.3
A11 - MKT	2	2	3	2.3		
A11 - MKT	4	3	3		3.3	2.8
A12 - MKT	3	3	3	3		
A12 - MKT	3	3	3		3	3
A13 - MKT	3	2	3	2.7		
A13 - MKT	3	2	2		2.3	2.5
A14 - MKT	3	3	3	3		
A14 - MKT	3	2	3		2.7	2.8
A15 - MKT	4	3	3	3.3		
A15 - MKT	3	1	1		1.6	2.5
A16 - MKT	3	2	3	2.7		
A16 - MKT	2	2	2		2	2.3
A17 - MGT	3	2	3	2.7		
A17 - MGT	2	1	2		1.7	2.2
A18 - MGT	2	2	1	1.7		
A18 - MGT	3	1	1		1.7	1.7
A19 - MGT	1	1	1	1		
A19 - MGT	3	1	1		1.7	1.3
A20 - MGT	2	2	2	2		
A20 - MGT	3	2	2		2.3	2.2
A21 - CAP	2	2	2	2		
A21 - CAP	3	3	3		3	2.5
A22 - CAP	2	2	1	1.7		
A22 - CAP	2	2	1		1.7	1.7
A23 - CAP	2	2	1	1.7		
A23 - CAP	3	3	3		3	2.3
A24 - CAP	1	1	1	1		
A24 - CAP	2	2	2		2	1.5
A25 ACCT	3	2	1	2		
A25 ACCT	1	2	1		1.3	1.7
A26 ACCT	3	3	3	3		
A26 ACCT	3	3	2		2.7	2.8
A27 ACCT	2	1	2	1.7		
A27 ACCT	3	2	2		2.3	2
A28 ACCT	3	2	1	2		
A28 ACCT	3	3	3		3	2.5
A29 ACCT	1	1	1	1		
A29 ACCT	2	2	1		1.7	1.3
A30 ACCT	2	1	2	1.7		

A30 ACCT	1	1	1		1	1.3
A31 – BUS	3	2	3	2.7		
A31 – BUS	2	2	2		2	2.3
A32 – BUS	2	1	2	1.7		
A32 – BUS	3	3	3		3	2.3
A33 – BUS	1	2	2	1.7		
A33 – BUS	2	1	1		1.3	1.5
A34 – BUS	2	1	1	1.3		
A34 – BUS	3	2	1		2	1.7
A35 – BUS	3	2	2	2.3		
A35 – BUS	3	1	2		2	2.2

APPENDIX 3:  
Learning Outcomes – BUS 210 Principles of Management Syllabus

**MIDDLESEX COMMUNITY COLLEGE**  
**BUSINESS DEPARTMENT**  
**COWAN CENTER**

**BUS 210: PRINCIPLES OF MANAGEMENT**

**I. COURSE DESCRIPTION**

This course provides the student with foundations of management theory and practice. Topics of study include the management functions of planning, organization, controlling, leadership, and decision-making. **Note:** This course satisfies the Multicultural or Global Awareness, Values or Ethics or Social Policy and Written Communication Intensive Values.

**II. CREDIT HOUR POLICY**

Middlesex Community College follows the Carnegie Unit for credit. Students are expected to spend a minimum of 45 hours of work for each credit. The most common breakdown for one credit is one hour of class instruction and two hours of homework for 15 weeks each semester. A three credit course demands nine hours each week.

**III. PURPOSE AND OBJECTIVES**

The purpose of this hybrid course is to provide you with an overview of the study of management in organizations through the use of in-class lectures, facilitated discussion, small group activities, and case studies; and off-campus on-line glossary review, flashcards, games, interactive quizzes, self-assessments, and written management assignments utilizing **Cengage's CourseMate** and **HP LIFE (eLearning Initiative for Entrepreneurship) Modules**.

The course will integrate traditional, behavioral, and on-line approaches based on the four traditional management functions of planning, organizing, leading and controlling. The course will conclude with a focused consideration on managing diversity and ethics and social responsibility as is required by the intensive values for the course.

Throughout the course learners will be introduced to:

- What do we mean by term “management;”
- What is it that managers do;
- How do managers go about their role of planning,
- Decision-making,

- Addressing organization culture and structural design;
- Managing their human capital through motivation and rewards;
- Gaining a greater appreciation about the importance of communicating up, down and across the organization;
- Ensuring the plans, organizational structures, and influencing techniques achieve their desired results or outcomes from thoughtfully developed control systems and approaches.

By the end of this course, learners who have completed the assigned reading and actively participated in class activities will be able to demonstrate:

1. An understanding of topics such as planning, organizational environments and cultures, designing adaptive organizations, decision-making processes, influencing and communicating, and controlling.
2. Apply management principles towards specific management challenges, i.e., workplace diversity, social responsibility and business ethics.
3. Demonstrate analytical skills for identifying and solving practical management problems using traditional and on-line applications from a number of different theoretical perspectives.
4. Utilize observations of management behavior in organizational situations, and integrate those experiences with the knowledge gained in the course.

### III. PEDAGOGY

The material in this hybrid course will be taught using a variety of methods including lecture, guided discussion, small group activities, and videos (in-class); and **Cengage's CourseMate** e-learning assignments and **Discussion Board** (off-campus). The intent is to present the material in a variety of methods to meet the variety of learning styles of the participants.

### IV. REQUIREMENTS

The following text is available in the college bookstore:

Williams, Chuck (2013). **MGMT (7<sup>th</sup> ed.) with Course Mate access**. Mason, OH: South-Western, Cengage Learning. ISBN No. 978-1-285-09107-5

**HP LIFE eLearning Entrepreneurship Modules: "The HP LIFE (Learning Initiative for Entrepreneurship) eLearning"** an interactive online module format that guides the learner in developing business concepts and IT skills.

In addition, you are encouraged to locate and bring into class relevant current articles that you read from various magazines and journals like *Fortune*, *Fast Company*, *The Wall Street Journal*, *The Boston Business Journal*, *Harvard Business Journal*, *Black Enterprise*, *Entrepreneur*, *Working Women*, etc.

## V. PERFORMANCE REQUIREMENTS

Cengage's CourseMate	15%
• Flashcards	
• Games	
• Graded Quiz	
• Media Quiz	
• Self-Assessment	
• Management Exercise	
<b>HP LIFE Modules</b>	15%
Final Reflection Paper	15%
<b>Discussion Board</b>	15%
Class Participation	15%
Writing Assignments	25%

Your course grade will be determined based on a weighted average of your grades for each component and assigned in accordance with Cambridge Community's policies as detailed in the college catalogue on academic information.

### Overall

Participants will be evaluated based on weekly CourseMate e-learning assignments (i.e., glossary, flashcards, games, and interactive quiz) that reinforce assigned learning objectives from the textbook (on-line); interactive discussion via the **Discussion Board** (on-line); class participation during guided discussions, videos, and self-assessment sharing (in-class); written management exercises (off-campus) and a final reflection paper (off-campus). Compliance with the guidelines including meeting due dates, will be included in the evaluation of your performance on assignments. It is expected that readings, writing assignments, CourseMate interactive assignments, and **Discussion Board** assignments will be completed when requested unless there has been some prior communication between us. Finally, writing assignments MUST BE saved in .doc, .docx, .pdf. or .rtf ONLY. I cannot open .wps and it will delay my receipt and grading of your paper.

### Cengage's CourseMate

At the end of each chapter, you will be assigned selected weekly on-line learning activities including glossary, flashcards, games, interactive quiz, video quiz, and self-assessment activities. These are intended to be completed outside the classroom and extend the two hour in-class learning activities, reinforce key concepts and principles, and utilize technology to provide an additional method of content delivery that will be available for your access. These activities will be graded based on your participation. That is, you are graded on whether or not you

undertake the activities versus how well you do on the activities. Of course, the better you do, the more you learn. To be clear, the intent of these activities is educational not evaluative. But, if you do not complete the assignments, your learning will be limited; thus, the need to grade your participation. **You will need the following Course Key to access the on-line course activities in addition to your textbook access code: CM-9781285069616-0000016.**

### Final Reflection Paper

At the end of the course, you will be required to write a 5 - 10 page reflection paper about your learning experiences in this class. This paper may be conducted as (a) a research paper on a specific management topic utilizing external resources; or (b) a reflection of your key learnings, takeaways, or epiphanies that you will have gained during the course; or (c) a plan for practice where you will discuss how you intend to utilize the management concepts you have learned to improve your practice in the workplace; or (d) a book review of a management book. These assignments are intended to ensure that you integrate these learnings into your professional experience and add them to your academic quiver to use to support your acquisition of additional business knowledge. These assignments will also build your business writing and research skills (clear, concise and impactful). You will be evaluated based on the clarity of your writing; your coverage of the topic; and writing mechanics, e.g., grammar, punctuation, word use, sentence structure, and spelling.

### Discussion Board

You are expected to participate in class discussions via Blackboard's **Discussion Board** format which is intended to maximize the value of class material and to extend your learning experience outside of the classroom. You will be assigned a weekly Management Workplace video from Cengage's CourseMate that requires you to discuss how you will apply weekly management concepts. You will post your answer on the **Discussion Board**. In addition, you must respond to at least three other fellow students' postings. Thus, you will be evaluated not only on whether or not you respond to the management case scenario (minimal engagement), but also on whether or not you respond to others' commentary. The more (that is the amount AND the quality) you participate, the better for the interaction, everyone's learning, and for your assessment.

### Class Participation

Because this is a hybrid class, there will also be opportunities for in-class participation through guided discussions; small group activities; asking questions; seeking clarifications; sharing insights from viewing videos in-class; and bringing in relevant articles to class from business magazines, journals, and newspapers. Also, for this course, there are weekly self-assessment exercises that we will discuss in class each week. These self-assessments will take an hour to complete. In this regard, participation will be assessed based on its relevance to the topic, its importance towards addressing a significant issue, if it is thought-provoking in nature, and its originality.

You are expected to attend class regularly and to participate in class discussions and activities in order to maximize the value of the class material and to optimize your learning experience. You are expected to have read assigned reading prior to class in order to actively participate in the class discussion. You may find that taking notes are helpful. Also, you may be called on at any time, without prior notice, to provide a synopsis of a concept or a case, its major points, how course concepts relate to the situation described, what are the muddiest points in the work, and/or what would make the material clearer.

### Writing Assignments

There will be weekly written management exercise that will be assigned from Cengage's CourseMate that will require you to utilize the management concepts that we will discuss each week and that you will have read about. The assignment may be two to three pages and may require an additional 2-3 hours depending on the assignment. These weekly written assignments are another opportunity for you to demonstrate your understanding of the concepts to which you are being exposed. Like for all written work, your evaluation is based on the clarity of your writing; your coverage of the topic; and writing mechanics, e.g., grammar, punctuation, word use, sentence structure, and spelling.

### Class Attendance

Attendance will be taken at every class session which you are expected to attend. If you will be absent, please inform me via email in advance regarding the reason for your absence. Absence for cause is considered an excused absence. Absence due to illness beyond one class session requires a doctor's note as does absence due to jury duty.

Since absence from class has its own consequences, i.e., missing the review of chapter material, class discussion, handouts, videos, etc., I will not specifically reduce your overall grade since chronic absence will negatively affect your overall class grade. Of course, continuing absence will negatively affect your class participation grade since you cannot participate in class.

However, if a student's overall grade is exactly midway between two grades, your positive attendance will be taken into account. For example, if your overall grade average equals 3.5 which is exactly midway between a B+ (3.3) and an A- (3.7), then class attendance, which is greater than 80%, will enable me to round up to the A-. Class attendance less than 80% will require me to round down to the B+.

### **Tentative Class Schedule**

Please follow the planned Class Schedule unless otherwise instructed. The Class Schedule may be modified as necessary (i.e. assignments may be added, deleted or moved).

### **Saturday, May 24, 2014 – Opening Class**

Review of the syllabus and course requirements  
Review of the Blackboard site  
Review of Cengage's CourseMate site (i.e., access, content, assessment)  
Review HP LIFE Registration Site  
Roster Information  
Ice Breaker

Next Week's Assignments:

Read Chapter 1: "Management"  
HP LIFE Module  
**Discussion Board** posting regarding the class kickoff due Friday, May 30 by 11:59pm.

### **Saturday, May 31, 2014**

Review Chapter 1: "Management"  
Video: Day in the Life of a Line Supervisor  
Small group experiential class activities

Next Week's Assignments:

Read Chapter 2: "History of Management"

CourseMate Activities for Chapter 1:

- Download Power Point slides (optional)
- Review Media Quiz (required)
- Review Flashcards (required)
- Do Game exercise (required)
- Complete Graded Quiz (required)
- Complete Self-Assessment (required for next week's class discussion)

Written Management Exercise (from Cengage's CourseMate) due Saturday, June 7.  
**Discussion Board** posting utilizing the Management Workplace Video (from Cengage's CourseMate) due Friday, June 6 by 11:59pm.

### **Saturday, June 7, 2014**

Review Chapter 2: "History of Management"  
Share the Self-Assessment in-class  
Small group experiential class activities

Next Week's Assignments:

Read Chapter 3: "Organizational Environment & Cultures"

CourseMate Activities for Chapter 2:

- Download Power Point slides (optional)
- Review Media Quiz (required)
- Review Flashcards (required)
- Do Game exercise (required)
- Complete Graded Quiz (required)
- Complete Self-Assessment (required for next week's class discussion)

Written Management Exercise (from Cengage's CourseMate) due Saturday, June 15.

**Discussion Board** posting utilizing the Management Workplace Video (from Cengage's CourseMate) due Friday, June 14 by 11:59pm.

### **Saturday, June 14**

Review Chapter 3: "Organizational Environment & Cultures"

Video: "Culture of Three Companies"

Share the Self-Assessment in-class

Small group experiential class activities

Next Week's Assignments:

Read Chapter 5: "Planning and Decision Making"

CourseMate Activities for Chapter 3:

- Download Power Point slides (optional)
- Review Media Quiz (required)
- Review Flashcards (required)
- Do Game exercise (required)
- Complete Graded Quiz (required)
- Complete Self-Assessment (required for next week's class discussion)

Written Management Exercise (from Cengage's CourseMate) due Saturday, June 21.

**Discussion Board** posting utilizing the Management Workplace Video (from Cengage's CourseMate) due Friday, June 20 by 11:59pm.

### **Saturday, June 21, 2014**

Review Chapter 5: "Planning and Decision Making"

Video: "Skate Park"

Share the Self-Assessment in-class

Small group experiential class activities: NASA Lunar Exercise

Next Week's Assignments:

Read Chapter 9: "Designing Adaptive Organizations"

CourseMate Activities for Chapter 5:

- Download Power Point slides (optional)
- Review Media Quiz (required)
- Review Flashcards (required)
- Do Game exercise (required)
- Complete Graded Quiz (required)
- Complete Self-Assessment (required for next week's class discussion)

Written Management Exercise (from Cengage's CourseMate) due Saturday, June 28.

**Discussion Board** posting utilizing the Management Workplace Video (from Cengage's CourseMate) due Friday, June 27 by 11:59pm.

### **Saturday, June 28**

Review Chapter 9: "Designing Adaptive Organizations"

Video: "Organizational Design"

Share the Self-Assessment in-class

Small group experiential class activities

Next Week's Assignments:

Read Chapter 15: "Managing Communications"

CourseMate Activities for Chapter 9:

- Download Power Point slides (optional)
- Review Media Quiz (required)
- Review Flashcards (required)
- Do Game exercise (required)
- Complete Graded Quiz (required)
- Complete Self-Assessment (required for next week's class discussion)

Written Management Exercise (from Cengage's CourseMate) due Saturday, July 5.

**Discussion Board** posting utilizing the Management Workplace Video (from Cengage's CourseMate) due Friday, July 5 by 11:59pm.

### **Saturday, July 5, 2014**

Review Chapter 15: "Managing Communications"

Video: "Communicating Cultures Across Cultures"

Share the Self-Assessment in-class

Small group experiential class activities

Next Week's Assignments:

Read Chapter 16: "Control"

CourseMate Activities for Chapter 15:

- Download Power Point slides (optional)
- Review Media Quiz (required)
- Review Flashcards (required)
- Do Game exercise (required)
- Complete Graded Quiz (required)
- Complete Self-Assessment (required for next week's class discussion)

Written Management Exercise (from Cengage's CourseMate) due Saturday, July 12.

**Discussion Board** posting utilizing the Management Workplace Video (from Cengage's CourseMate) due Friday, July 11 by 11:59pm.

**Saturday, July 12, 2014**

Review Chapter 16: "Control"

Video: "Foundations of Control at TerraCycle"

Share the Self-Assessment in-class

Small group experiential class activities

Next Week's Assignments:

Read Chapter 4: "Ethics and Social Responsibility"

CourseMate Activities for Chapter 16:

- Download Power Point slides (optional)
- Review Media Quiz (required)
- Review Flashcards (required)
- Do Game exercise (required)
- Complete Graded Quiz (required)
- Complete Self-Assessment (required for next week's class discussion)

Written Management Exercise (from Cengage's CourseMate) due Saturday, July 19.

**Discussion Board** posting utilizing the Management Workplace Video (from Cengage's CourseMate) due Friday, July 18.

**Saturday, July 19, 2014**

Review Chapter 4: “Ethics and Social Responsibility”  
Video: “Money & Ethics” and “Starbucks: More Than Coffee”  
Share the Self-Assessment in-class  
Small group experiential class activities

Next Week’s Assignments:

Read Chapter 12: “Managing Individuals and a Diverse Workforce”  
CourseMate Activities for Chapter 4:

- Download Power Point slides (optional)
- Review Media Quiz (required)
- Review Flashcards (required)
- Do Game exercise (required)
- Complete Graded Quiz (required)
- Complete Self-Assessment (required for next week’s class discussion)

**Discussion Board** posting utilizing the Management Workplace Video (from Cengage’s CourseMate) due Friday, July 26 by 11:59pm.

**Saturday, July 27, 2014 – Closing Class**

Review Chapter 12: “Managing Individuals and a Diverse Workforce”  
Share the Self-Assessment in-class  
Small group experiential class activities

**Final Research Paper, Reflection, Plan for Practice, or Book Review Paper Due**

**Faculty Evaluation**

## APPENDIX 4:

### Student Learning Outcomes – BUS 210 Principles of Management Assignment: Global Management

#### **Principles of Management (BUS 210) Global Management Assignment**

##### **Assignment Overview**

Part I: Assume you work for a multi-national corporation and you have recently been notified of a new international assignment. This is a special assignment located in \_\_\_\_\_ (you may select the country) for 24-36 months. In order to prepare for your assignment, you will need to identify and describe using evidence obtained from your cited research for the following topics to prepare for your new assignment:

- Country historical overview
- Country political system and its current status
- Country socio-culture
- Country economic system and its current status
- Country business customs
- Status of country safety and security

Part II: From a global management perspective based on your reading, your research, and our in-class discussions; and utilizing your critical and creative thinking and problem solving skills, also please address the following:

- Outline what specific management challenges you expect to encounter
- Evaluate how you plan to address them
- Explain what specific benefits you foresee managing in a different country
- Evaluate how you plan to avail yourself of those benefits
- Further, analyze what adjustments, if any, will you need to undertake in order to prepare for an extended assignment in this country
- Evaluate how you feel about being assigned to this country given what you have learned

##### **Assignment Requirements**

As a result of your research, please write a 5-7 page paper about what you learned about the country, its culture, and systems (part I), and how you will evaluate and apply your management knowledge to your self-selected site of assignment (part II) as a result of your research. Do not simply copy reams of information about a country and paste it into your paper. You must conduct your research and synthesize the material you have read to decide what to put into the paper that demonstrates your understanding of global management systems, cultures, and cross-cultural challenges in the country you have selected.

The quality of your research will depend on the quality of your research sources. You are encouraged to use appropriate international sources, online newspapers and websites based in that country that are written in English (see <http://www.nationsonline.org/oneworld/news.html>), as well as sources published in the U.S. for the benefit of our citizens traveling and working abroad, such as <http://travel.state.gov/content/passports/english/country.html>, <http://www.state.gov/travel/>, that will help you to develop a more authentic understanding of the country you choose. **You must use at least five sources.**

Five to seven pages, double space, 12 point type.

Citation page required for all external sources (APA style preferred, MLA accepted). Your writing will be assessed based on the paper's content and writing mechanics as follows:

- The quality and thoroughness of your research, how well you have structured your ideas, your ability to demonstrate your cross-cultural awareness and understanding of global systems, and your ability to apply this knowledge to contemporary global contexts.
- In writing, what you say is only as good as how well you say it. Thus, I will also assess your writing mechanics including grammar, punctuation, word use, spelling, and sentence structure.

This assignment is worth 20% of your total Principles of Management grade.

Finally, all writing assignments are expected to be turned in the beginning of class unless prior arrangements have been made with me. Assignments turned in after the deadline will be accepted up to one week. However, they will be reduced by one grade. That is, a late assignment that would have originally received an A will receive a B. Assignments later than one week from the original due date will not be accepted and will be graded as F.

**Rev. 9/9/2015**

APPENDIX 5:  
Learning Outcomes – BUS 240 Principles of Marketing Syllabus

**MIDDLESEX COMMUNITY COLLEGE  
BUSINESS DEPARTMENT  
COWAN CENTER**

**BUS 240: PRINCIPLES OF MARKETING**

**I. COURSE DESCRIPTION**

This course examines business activities that match consumers with an organization’s resources. Topics covered are the marketing concept, the marketing environment, ethics and social responsibility, consumer behavior, global marketing, market research, market segmentation, and the marketing mix. **Note:** This course satisfies the Multicultural or Global Awareness Intensive Value. **Prerequisite:** BU 1101 or permission of the instructor. **Credits 3.0.**

**II. CREDIT HOUR POLICY**

**Middlesex Community College follows the Carnegie Unit for credit. Students are expected to spend a minimum of 45 hours of work for each credit. The most common breakdown for one credit is one hour of class instruction, and two hours of homework for 15 weeks each semester. A three credit course demands each week nine hours of student engagement consisting of 3 hours classroom instruction, and 6 hours out of classroom assignments).**

Weekly Assignments	Approximate Hrs. of Out of Classroom Time Needed
Weekly Online Text Module – Reading & Writing Assignment	2.5 hrs. – 3.0 hrs.
HP LIFE eLearning Online Module Assignment	.5 hr. – 1 hr.
ePortfolio Development: Professional Showcase of Student’s Skills demonstrating a reflective genre of authentic written and visual artifacts.	1.0 hrs. – 1.5 hrs.
Leadership Project Paper – Reading & Writing Assignment	2 hrs. – 2.5 hrs.

### III. INTENSIVE VALUES

Principles of Marketing satisfy one intensive value:

- Multicultural or Global Awareness
  - Text Chapters 1, 3, 4, 7, 9, 18
  - HP LIFE Modules

### IV. REQUIRED TEXT

Pride, W. and O. Ferrell. **Marketing**. Boston: Houghton Mifflin Company. 17th Edition (2014). International Standard Book Number (ISBN) **ISBN-13: 978-1-133-93925-2**.

**HP LIFE eLearning Entrepreneurship Modules:** Your professor has been working as part of a national collaboration to promote entrepreneurial education called ***“The HP LIFE (Learning Initiative for Entrepreneurship) eLearning”*** an interactive online module format that guides the learner in developing business concepts and IT skills. In order to be successful in this class, you need to regularly access the module format for the course when assigned. Through the MCC Blackboard site under the ***HP LIFE Entrepreneurship Modules*** tab, these modules can be access via a separate sign-in procedure.

### V. METHODOLOGY

The combined methodology of lecture, small group discussion, case analysis and individual and group marketing projects are the basis for student learning throughout the course. Students will be guided in their learning through the process of organization, self- reflection, collaboration, communication and critical thinking.

### VI. LEARNING OUTCOMES

1. Students will demonstrate improvement in their organization, self-reflection, collaboration, communication and critical thinking skills. The development of these skills is integrated into the core activities of the course in order to facilitate student learning experiences that engage students in acquiring the knowledge of fundamental marketing principles.
2. Students will demonstrate the ability to identify, articulate and examine business concepts in terms of global cultures, economic systems, technological systems, international trade, business organizations, labor relations, management, marketing systems and financial systems.

3. Students will develop the ability to differentiate social and ethical factors influencing business decisions on local and global communities.
4. Students will demonstrate the ability to employ a variety of internet resources to broaden students' discussions of critical business issues and articulate these issues in writing.
5. Students will develop a classroom environment that fosters open discussion and the exchange of diverse ideas.

## VII. STUDENT RESPONSIBILITIES

1. **Student Attendance Policy:** Students are expected to attend and participate in all classroom activities. Three unexcused absences will result in a conference with you to determine your continuance in the class and a note from someone in the medical or legal field will be required. Four unexcused absences will result in voluntarily withdrawing from the class.
2. Students are expected to read assigned chapters and other related materials prior to class attendance.
3. Students are expected to schedule adequate study time outside of class to complete all assignments. All assignments are due on the date assigned.
4. Students are expected to take assigned examination on dates given or by the discretion of the professor. **There are no make-up exams.**
5. Students are expected to complete all components of the assigned Marketing Project Group and Individual Paper. All drafts will be peer reviewed by your Group Members. Drafts are reviewed by MCC Writing Center accompanied by documentation of the Writing Center's slips. The final version of your group and individual papers will be submitted with your Power Point presentation slides. Student presentations will be videotaped and uploaded to your ePortfolio.

**No paper will be accepted without the MCC Writing Center Slip, and/or non-attendance at Student Presentations. All papers are required to be submitted at the beginning of the class session on the due date.**

6. Students are expected to make the professor aware of any concerns, issues, and questions about any aspect of the classroom or subject matter.
7. There is no eating, drinking, smoking, texting and cell phone use in the classroom.

**VIII. SPRING 2015 ACADEMIC CALENDAR**

January 19	Rev. Dr. Martin Luther King, Jr. Day
January 20	Classes Begin
February 16	Presidents' Day
March 16 -20	Spring Break
April 3	Last Day to Withdraw from a Class
April 15	Professional Day
April 20	Patriots' Day
May 8	Day Classes End
May 11 - 14	Day Classes Final Exams
May 21	Commencement
May 25	Memorial Day

**IX. GRADE EVALUATION PROCESS**

<b>DATE*</b>	<b>EVALUATION</b>	<b>GRADE %</b>
<b>3/12</b>	Exam I	15%
<b>4/16</b>	Exam II	15%
<b>5/7</b>	Marketing Group Project Paper & Group Student Presentations	25%
<b>Final Due Date – 5/9</b>	Portfolio Assignments Submission	20%
<b>5/12 &amp; 14</b>	Global Marketing Project Paper & Individual Presentations	25%
	<b>TOTAL</b>	<b>100%</b>

\*Dates are subject to change at the discretion to the professor.

**X. LECTURE SCHEDULE**

<b>WEEK</b>	<b>DATE</b>	<b>LECTURE / DISCUSSION TOPICS</b>	<b>TEXT</b>
1	1/19 – 1/24	<b><i>Rev. Dr. Martin Luther King Holiday Day</i></b>  Introduction to Course	
2	1/26 – 1/31	An Overview of Strategic Marketing	Chp 1
3	2/2 – 2/7	Planning, Implementing, and Evaluating Marketing Strategies	Chp 2
4	2/9 – 2/14	The Marketing Environment	Chp 3
5	2/16 – 2/21	<b><i>Presidents' Day Holiday</i></b> Social Responsibility and Ethics in Marketing	Chp 4
6	2/23 – 2/28	<b>EXAM I (2/26)</b>  Marketing Research and Information Systems	<b>Chps. 1-4</b>  Chp 5
7	3/2 – 3/7	Target Markets: Segmentation and Evaluation	Chp 6
8	3/9 – 3/14	Consumer Buying Behavior	Chp 7
9	3/23 – 3/28	Reaching Global Markets	Chp 9
10	3/30 – 4/4	Digital Marketing and Social Networking	Chp 10

	<b>4/3</b>	<b><i>Last Day to Withdraw from a Class</i></b>	
11	4/6 – 4/11	<b>EXAM II (4/9)</b>  Product Concepts	Chps. 5-7, 9 & 10  Chp 11
12	4/13 – 4/18	Product Concepts	Chp 11
13	4/20 – 4/25	<b><i>Patriots' Day Holiday</i></b>  Branding and Packaging	Chp 14
14	4/27 – 5/2	Branding and Packaging  Advertising and Public Relations	Chp 14  Chp 18
15	5/4 – 5/9  5/7	Advertising and Public Relations  <b>SUBMISSION MARKETING PROJECT PAPER &amp; GROUP STUDENT PRESENTATIONS (5/7)</b>	Chp 18
16	5/12 & 14	<b>Global Marketing Project Paper &amp; Individual Presentation (5/12 &amp; 14)</b>	

## XI. PORTFOLIO ASSIGNMENTS

**Core Student Success Skills (CSSS) Portfolio** Assignments are the student's depository of the skills building activities assigned over the course of the semester that incorporate: **(1) organization, (2) self-reflection, (3) collaboration, (4) communication, and (5) critical thinking.**

Students will submit all assignments via **Blackboard Portfolio Activities Tab** on a weekly basis by 11:59PM on Saturday according to the due dates assigned. All assignments must be saved and backed up either on your USB drive or hard drive on your PC.

**XII. PORTFOLIO ACTIVITY FORMAT**

Each activity document file title will be saved as a **MS Word or RTF document file** with the following information: (a) Student Name, (b) Activity #, and (c) Title of Activity.

**Example:** Sarah Gomez Activity #1 – Team Building Skills

In the header of each word document, you will include: (a) Student Name, (b) Course and Section Number, (c) Professor’s Name (d) Date Completed, (e) Activity #, and (f) Title of Activity (See pp. 6 - 8).

**Example of header to be applied to your MS Word or RTF document file with the exception of PDF document file submissions for HP LIFE Entrepreneurship eLearning Certificates:**

Student Name: Sarah Gomez  
 Course: BUS 240-52  
 Date: 1/25/14

Activity #1: Building Team Skills

**All submissions for HP LIFE Entrepreneurship eLearning Certificates will be a PDF document file accompanied by a MS Word reflection paper.**

**XIII. PORTFOLIO ASSIGNMENT SCHEDULE**

<b>Core Student Success Skills (CSSS) Portfolio Activity</b>	<b>Text / Handout Assignment</b>	<b>Revised Due Dates</b>
1. Building Team Skills	Handout #1 - Online	3/21/2015
2. Pre-Survey	Handout #2 - Online	3/21/2015
<b>3. HP LIFE Entrepreneurship</b>	<b>Module - Unique Value Proposition</b>	3/21/2015
4. Review Questions	Discussion & Review Questions Chp 1 (Q1 - Q10)	3/21/2015

5. HP LIFE Entrepreneurship	<b>Module - Marketing Benefits vs. Features</b>	3/21/2015
6. HP LIFE Entrepreneurship	<b>Module - Maximizing Capacity</b>	3/21/2015
7. Review Questions	Discussion & Review Questions Chp 2 (Q1 - Q12)	3/21/2015
8. VIEW FRONTLINE VIDEO - <i>The Persuaders</i>	Handout #4- Online	3/21/2015
9. Review Questions	Discussion & Review Questions Chp 3 (Q1 - Q17)	3/21/2015
10. HP LIFE Entrepreneurship	<b>Module – Profit and Loss</b>	3/21/2015
11. <i>Library Research Presentation</i>	Handout #3 - Online	3/21/2015
12. Review Questions	Discussion & Review Questions Chp 4 (Q1 - Q14)	3/21/2015
13. HP LIFE Entrepreneurship	<b>Module – Social Media</b>	3/21/2015
14. Review Questions	Discussion & Review Questions Chp 5 (Q1 - Q14)	4/18/2015
15. HP LIFE Entrepreneurship	<b>Module – Your Target Audience</b>	4/18/2015
16. Review Questions	Discussion & Review Questions Chp 6 (Q1 - Q17)	4/18/2015
17. HP LIFE Entrepreneurship	<b>Module – Selling Online</b>	4/18/2015
18. <i>VIEW FRONTLINE VIDEO - Digital Age</i>	Handout #6- Online	4/18/2015

19. Review Questions	Discussion & Review Questions Chp 7 (Q1 - Q17)	4/18/2015
<b>20. HP LIFE Entrepreneurship</b>	<b>Module – Setting Price</b>	4/18/2015
21. Review Questions	Discussion & Review Questions Chp 9 (Q1 - Q10)	4/18/2015
<b>22. HP LIFE Entrepreneurship</b>	<b>Module – Managing Contact Information</b>	4/18/2015
23. Review Questions	Review Questions Chp 10 (1 – 10)	4/18/2015
<b>24. HP LIFE Entrepreneurship</b>	<b>Module – Customer Relationship Management</b>	5/9/2015
<b>25. HP LIFE Entrepreneurship</b>	<b>Module – Presenting Data</b>	5/9/2015
<b>26. HP LIFE Entrepreneurship</b>	<b>Module – Effective Business Websites</b>	5/9/2015
<b>27. HP LIFE Entrepreneurship</b>	<b>Module – Sales forecasting</b>	5/9/2015

## APPENDIX 6:

Student Learning Outcomes – BUS 240 Principles of Marketing Assignment:  
Group Project – Domestic Marketing Plan

**Middlesex Community College  
Department of Business Administration  
BUS 240 Principles of Marketing**

### **CAPSTONE GROUP PROJECT- DOMESTIC MARKETING PLAN**

#### **Scenario:**

*The Distinctive Doggie & Cattie Company* is a traditional manufacturer of dog and cat foods. After 10 years in the business, the president of the company wants to explore new international markets for a new product division. Product Marketing Managers have been directed to individually develop new and innovative product(s) for the emerging market in a non-English speaking country.

Individual Product Marketing Managers will develop a comprehensive international marketing plan based on his/her team's product idea to be adaptive for an emerging international market. Each Product Marketing Manager will have a different non-English speaking country that has been self-selected for the focus of the international marketing plan. The president has given the Product Marketing Manager until **May 14, 2015** to have a comprehensive international marketing plan and power point presentation to be given to upper level management and the company's board of directors. The Product Marketing Manager with the most comprehensive and profitable international marketing to initially enter will receive a \$25,000 bonus.

## **GROUP PROJECT - DOMESTIC MARKETING PLAN**

### **1. Title Page**

### **2. Table of Contents**

### **3. Executive Summary:**

The Executive Summary is a synopsis of the Marketing Plan (1 – 2 pp.).

The executive summary provides a general overview of the entire marketing plan project including:

- highlights of potential market conditions of the pet marketplace
- product concept, pricing promotion and distribution

### **4. Stage I – Group Process: Product Conception:**

One page document describing in detail an innovative product concept for entry to the U.S. pet market that does not currently exist in the market.

### **5. Stage II – Domestic Environmental Factors:**

Marketing Environmental Model applied to the domestic market of the United States of America.

#### **1. Domestic Political & Legal Forces**

- Political risk
- Government Stability
- Employment Laws
- Trade Barriers and Restrictions
- Business Regulations
- Commercial Law
- Bureaucracy

- Taxation Policies
- Intellectual Property Protection
- Bribery and Corruption

## **2. Domestic Economic Forces**

- Economic composition
- GDP Trends & Growth
- Interest Rates
- Disposable Income
- Credit Availability
- Employment Cost
- Economic Risk Factors
- Transportation
- Infrastructure Energy Costs and Infrastructure

## **3. Social & Cultural Forces**

- Demographics
- Income Distribution / Social Classes
- Educational Levels
- Religion
- Language
- Lifestyles
- Consumerism
- Workforce Mobility
- Worker Rights and Benefits

## **3. Technological**

- Basic Infrastructure
- communications Infrastructure
- Network Connectedness
- R & D spending
- Adoption Diffusion Patterns
- Speed of Transfer
- Rate Obsolescence

## **5. Environmental**

- Environmental Awareness and Sensitivity

- Environmental Protection Regulations
- Pollution Levels
- Waste Management
- Attitudes towards Green or Ecological Products
- Presence of Environmental Groups

## 6. Stage IV – SWOT Analysis

1. Strengths
2. Weaknesses
3. Opportunities
4. Threats

## 7. Stage V – Research Survey:

Develop 20 - 25 questions for your potential target audience utilizing *Survey Monkey Software Platform*.

## 8. Stage VI – Marketing Mix (Domestic and International):

1. Target Market Segmentation Strategy
2. Product Strategy
3. Pricing Strategy
4. Distribution Strategy
5. Promotion Strategy

## 10. Stage VII - Sales Product Projections

## 11. Stage VII - Promotional Brochure:

Create a product brochure that provides your target audience with the key information to make a purchasing decision.

**12. The Final Marketing Project includes:**

(1) a 10 - 15 page group paper (double spaced) integrating the all of the project stages; and (2) develop Power Point slides of the marketing project for class presentation 15 min. Each group member must present a section of the project.

**XIV. ELECTRONIC PORTFOLIO (ePortfolio) PROJECT**

Students will create a professionally designed Electronic Portfolio (ePortfolio) that provides a place to archive, reflect upon, and share their best work with faculty, scholarship committees, four year colleges and universities, and potential employers. Your ePortfolio may be used to showcase the entirety of an academic and professional experience in terms of your reflections on the signature work you have created for this course and other courses in your program. You will design your ePortfolio based on the professor's designed template as your guide. In addition, students will present their ePortfolio body of work to the class.

## APPENDIX 7:

Student Learning Outcomes – BUS 240 Principles of Marketing Assignment:  
Capstone Project – International Marketing Plan

**Middlesex Community College  
Department of Business Administration  
BUS 240 Principles of Marketing**

### **CAPSTONE PROJECT - INTERNATIONAL MARKETING PLAN**

#### **Scenario:**

*The Distinctive Doggie & Cattie Company* is a traditional manufacturer of dog and cat foods. After 10 years in the business, the president of the company wants to explore new international markets for a new product division. Product Marketing Managers have been directed to individually develop new and innovative product(s) for the emerging market in a non-English speaking country.

Individual Product Marketing Managers will develop a comprehensive international marketing plan based on his/her team's product idea to be adaptive for an emerging international market. Each Product Marketing Manager will have a different non-English speaking country that has been self-selected for the focus of the international marketing plan. The president has given the Product Marketing Managers until **May 14, 2015** to have a comprehensive international marketing plan and Power Point presentation to be given to upper level management and the company's board of directors. The Product Marketing Manager with the most comprehensive and profitable international marketing to initially enter will receive a \$25,000 bonus.

## CAPSTONE INTERNATIONAL MARKETING PLAN

### 1. Title Page

### 2. Table of Contents

### 3. Executive Summary (1 p.):

The Executive Summary is a synopsis of the Marketing Plan.

The executive summary provides a general overview of the entire marketing plan project including:

- highlights of potential market conditions of the pet marketplace
- product concept, pricing promotion and distribution
- projected sales and profitability on entering the emerging non-English speaking market

### 4. Stage I –Product Conception/ Standardization or Adaptation (1p.):

Based on your team’s group marketing product idea, write a detail product description of an innovative product conception standardized or adapted for entry for the non-English speaking country (1 page).

### 5. Stage II – International Environmental Factors (4-6 pp.):

Apply the Marketing Environmental Model to the emerging international market of your choice. Individual students will self-select a non-English speaking foreign country with which the student will develop a marketing strategy of the group product concept. Research the following areas below and analyze the product potential for successful market entry.

#### 1. Foreign Country’s Political and Legal Forces

**Conduct an analysis to justify entry into the selected foreign country of the following areas below for the self-selected foreign country:**

- Political risk
- Government Stability
- Employment Laws
- Trade Barriers and Restrictions
- Business Regulations and Policies of Foreign Country’s Pet Industry
- Commercial Law
- Bureaucracy

- Taxation Policies
- Intellectual Property Protection
- Bribery and Corruption

## **2. Foreign Country's Economic Forces**

**Conduct an analysis to justify entry into the selected foreign country of the following areas below for the self-selected foreign country:**

- Economic composition
- GDP Trends and Growth
- Interest Rates
- Disposable Income
- Credit Availability
- Employment Cost
- Economic Risk Factors
- Transportation
- Infrastructure Energy Costs and Infrastructure

## **3. Foreign Country's Social and Cultural Forces**

**Conduct an analysis to justify entry into the selected foreign country of the following areas below for the self-selected foreign country:**

- Demographics
- Income Distribution / Social Classes
- Educational Levels
- Religion
- Language
- Lifestyles
- Consumerism
- Workforce Mobility
- Worker Rights and Benefits
- Cultural Differences of Foreign Country to the U.S.A.

## **4. Foreign Country's Technological Forces**

**Conduct an analysis to justify entry into the selected foreign country of the following areas below for the self-selected foreign country:**

- Basic Infrastructure

- Communications Infrastructure
- Network Connectedness
- Research and Development spending
- Adoption Diffusion Patterns
- Speed of Transfer
- Rate Obsolescence

## 5. Foreign Country's Environmental Forces

**Conduct an analysis to justify entry into the selected foreign country of the following areas below for the self-selected foreign country:**

- Environmental Awareness and Sensitivity
- Environmental Protection Regulations
- Pollution Levels
- Waste Management
- Attitudes towards Green or Ecological Products
- Presence of Environmental Groups

## 6. Foreign Country's Competitive Forces

**Conduct an analysis to justify entry into the selected foreign country of the following areas below for the self-selected foreign country:**

- Pet Market: Market Size, Market Growth, Foreign Consumers Buying Behavior
- Foreign Local and International Competitors of pet Products

## 7. Stage IV – SWOT Analysis (1 – 2pp.)

**Conduct an analysis to justify entry into the selected foreign country of the following areas below for the self-selected foreign country:**

- Strengths (Internal to the Doggie & Cattie Co.)
- Weaknesses (Internal to the Doggie & Cattie Co.)
- Opportunities (External to the Doggie & Cattie Co.)
- Threats (External to the Doggie & Cattie Co.)

## 8. Stage V – Research Survey (1 – 2 pp.):

Develop 20 - 25 questions for your potential target audience utilizing the **Survey Monkey Software Platform**.

### **9. Stage VI – International Marketing Mix (2 – 4 pp.):**

Incorporate your analysis from the political, legal, economic, social cultural, technological, environmental and competitive areas in crafting the marketing mix strategy for entering the pet industry of the foreign country. Develop marketing objectives based Projected International Sales (**Five Year Income Statement Projections: Projected Revenue – Projected Expenses = Projected Profits**).

- Target Market (Segmentation Strategy)
- Product Strategy (Standardization or Adaptation)
- Pricing Strategy
- Distribution Strategy
- Promotion Strategy

### **10. Conclusion & Recommendation to the President of the Doggie & Cattie Co. (1 p.)**

#### **NOTE:**

**The Final International Marketing Project Paper includes:**

**The submission of a 10 - 15 pages individual paper (double spaced) integrating the all of the project stages (no page restriction); and develop Power Point slides of the marketing project for an individual class presentation of 10 – 15 min.**

**All references from outside sources must use the APA In-Text Citation and Reference(s) format to document your evidence.**

**The term project “International Marketing Plan Project” is valued at 20% of your grade.**

*Marketing Rubric*

<b>Grade 90 – 100 %</b>	<b>Grade 80 – 89 %</b>	<b>Grade 70 – 79 %</b>	<b>Grade 60 – 69 %</b>	<b>Grade 0 – 59 %</b>
Topic covers 10-15 full pages, doubled spaced, 12 pt.)	Topic covers 10 - 15 full pages, doubled spaced, 12 pt.)	Topic covers 10-15 full pages, doubled spaced, 12 pt.)	Topic covers less than 10- 15 full pages, doubled spaced, 12 pt.)	Topic covers less than 10- 15 full pages, doubled spaced, 12 pt.)
Depth and coherence in conveying ones understanding of the marketing concepts as applied to project	Coherence in conveying ones understanding of the marketing concepts as applied to project	General coherence in understanding of the marketing concepts as applied to project	Lack of coherence in understanding the marketing concepts as applied to project	Lack of coherence in understanding the marketing concepts as applied to project
An exemplary use of innovative product ideas	A good use of innovative product ideas	An acceptable use of innovative product ideas	Unacceptable use innovative product ideas	Lack of any one example innovative product ideas
An exemplary use of grammar	A good use grammar	Satisfactory use of grammar	Lack of appropriate use of grammar	Lack of appropriate use of grammar
Exemplary use of text & lecture information	Use of text & lecture information	Use of text & lecture information	Use of text & lecture information	Use of text & lecture information
Exemplary definitions of all key terms	Defined all key terms	Defined some key terms	Terms not defined well	Terms not defined
Exemplary in writing, spelling & presentation graphics	Clarity in writing, spelling & presentation graphics	Lack clarity in writing, spelling & presentation graphics	Lack clarity in writing, spelling & presentation graphics	Lack clarity in writing, spelling & presentation graphics
Exemplary use of APA In-Text Citations & APA References	Good use of APA In-Text Citations & APA References	Satisfactory use of APA In-Text Citations & APA References	Lack of APA In-Text Citations & APA References	Lack of APA In-Text Citations & APA References

**COMMENTS:**

## APPENDIX 8:

### Student Learning Outcomes – CAP 101 Computer Applications Assignment: Global Research

#### ***CAP 101: Computer Applications***

#### ***Global Research Assignment***

#### **Total Points: 150 (15% of our total grade)**

In your academic career and beyond, you will often need to conduct research to gather information on a subject and then present this information to inform, make a compelling argument and/or support a statement. This assignment will help you to better understand how to research information, identify reliable sources, properly cite those sources, professionally use the internet as a research tool, and present information gathered using Microsoft Office applications. This assignment will also help you further develop your professional brand by encouraging cognitive reflection on how you present your knowledge to a potential employer.

#### **Scenario**

You have applied to be Vice President of Marketing for *Bling Clothing Stores*. One of the main tasks for this job is to market Bling's Spring 2016 accessories line to department stores internationally. If hired, you and the President of Bling will fly to the headquarters 3 times next year to present to your new clients.

The competition is fierce for the job, but Bling has narrowed it down to 3 finalists. To guarantee her final choice is the right candidate, Bling's President has asked each of the finalists to prepare a memo and present their findings about how to do business in one of the countries. Business etiquette is important and since this is the first time Bling is going to sell internationally, the President wants to have a thorough understanding of cultural backgrounds to ensure proper business communication at this new global level.

Additionally, the President would like you to create a trip budget, this will include an individual trip budget of \$5,000 for 2 people, and a yearly budget not to exceed \$15,000 for 3 trips total (January, May, and October).

#### **Steps**

1. Conduct "global business etiquette" research and compare cultural norms and business expectations to US standards. We will go to the library to learn more about "how to do research". You will not be able to get all of your resources from the Internet alone,

although you will use the internet to plan your trip itinerary. The MCC library has scholarly sources that are required for this project.

2. After conducting research, you will write a memo in **Word** utilizing MLA format and the **Citations and Works Cited** function of Word that you are learning about in your textbook. **DUE:**
3. You will prepare an oral presentation and create a **PowerPoint** to supplement your oral presentation. This presentation will be no more than 4 minutes. **DUE:**
4. You will create an **Excel workbook** for the trip budget. **DUE:**

### {step one} Research

- Select a country to research, we will draw from a hat in class to determine the order in which people may choose. There will only be 2 of the same countries allowed.
- Search and browse through articles in the MCC database on global business etiquette \*\*you must have a pin # from the library in order to access these from home
- Search the internet for reliable sources
- Find articles that will help you explain the following cultural perspectives to the President of Bling:
  - Body Language
    - What is acceptable during business meetings? Sitting, standing, and crouching?
    - Is it different for a women vs. a man?
    - What gestures have meanings in this culture? When should you use them?
    - Are people encouraged to show emotions?
    - What emotions are acceptable for men and women to show in business situations?
    - Do men and women show the same emotion in the same way?
    - Is one sex considered more emotional than the other? Why?
  - Greetings – how would you greet the following:
    - Someone you are being introduced for the first time?
    - An acquaintance?
    - The boss?
    - A very good friend?
    - Would the answers change if the person were opposite sex rather than same sex?
  - Expectations around time
    - How late could a person be to a business meeting before being considered rude?
    - During a meeting with one person, would it be polite to answer a phone call from someone else?
    - What are normal work hours? Workdays?

- Dress
  - What would you wear to school, work, and a party?
  - Are there certain colors or styles to consider?
  - Is one sex expected to dress a certain way? Why?
- Entertainment
  - What specific forms of entertainment are acceptable in a business setting?
- Other
  - Find another topic you find interesting.
  - Highlight the most interesting aspects and those that are most different from the US.
  - Such topics may include:
    - Religion
    - Climate
    - Historical background
    - Holidays
    - Traditions
    - Sports
    - Recreation
    - Food
- Find at least 2 reliable sources for the cultural perspective portion
  - 1 **MUST** be a popular source, and 1 **MUST** be from a scholarly journal
  - Please find articles that were published within the last 5 years
  - If you are struggling to find sources, please see a librarian for assistance
- Other information to find out (You may use this internet for this information from a reliable source). Remember, you are planning 3 trips (January, May, and October) for 2 travelers (each will have their own room).
  - Lodging
  - Currency exchange
  - Flights
  - Transportation – public, rental?
  - Average breakfast, lunch, dinner costs
  - Entertainment – 1 live show, 1 museum fee
  - Anything else you want to add to the trip budget? Go for it, be creative, but remember, you are trying to get this job and represent your professional brand!

**{step two} Write a 500 - 600 word Memo**

**Using the following prompts as guidelines, prepare a memo for Bling's President.**

A business memo will include the same kind of information at the top as a business email: to, from, cc, subject, and date

**Summary:**

- Put in your own words the information you have learned about business etiquette in the country you selected.
- Be sure to touch on body language, greetings, expectations around time, dress, entertainment, and one other topic you found interesting.
- For each piece of information you discuss, you will need to properly cite it in the memo so that the President will know exactly where you found the information.
  - Example:  
According to Dr. Murphy’s article entitled “Global Taboos and Must Dos”, it is unacceptable to reach for your phone during a business meeting (3).

After a business meeting, it is customary to meet at the local karaoke bar for a couple drinks and singing (Murphy 4).

#### **Evaluate:**

- Discuss and explain each of the following:
  - What specific things stood out to you as really important to think about when doing business in that country? **Why?**
  - Provide one example of how business etiquette is different than the US. Why do you think this is?
  - How did what you learned through research influence your trip budget? Why?
    - Insert the 3 month trip budget chart
  - If you had not done this research, what one cultural faux pas would you have committed?
  - How would you interact with someone of the opposite gender? Why do you think that is important/not important to that culture? How do you feel about this?

#### **Technical requirements:**

- Follow the guidelines as described in your textbook for formatting MLA research papers to properly cite your sources.
- Create a memo document so that it says who prepared, date prepared, subject, and includes titled sections “summary” and “evaluate”.
- You must use **Manage Sources** in Word while composing your assignment.
- You also must include a **Works Cited** page so that the President of Bling will know what reliable sources you used in your Manage Sources.
- **You will upload this document** to Blackboard.

#### **Additional Resources**

MLA in-text citation: <https://www.middlesex.mass.edu/RL0s/463/mlaintxt.pdf> Please review MCC’s “Understanding Plagiarism” document.

<https://www.middlesex.mass.edu/RL0s/465/plagrism.pdf>. If you have any questions or concerns, please ask. **It is highly recommended that you make an appointment with the Writing Lab to review your work with a specialist.** This will give you plenty of time to make corrections to your grammar, punctuation, sentence structure, etc. **I will provide extra credit of**

**5 points** if you go to the Writing Lab to utilize their services. YOU MUST turn in the appointment and corrections sheet they sign off on to get credit.

### **{step three} Create an Excel Workbook**

You will create an **Excel workbook** to keep track of the trip budget use **Charts** to organize this data about Bling.

#### **Technical requirements:**

- FOR EACH TRIP:
  - Make clear the total budget amount, total expenses, and the difference
    - Include a currency exchange comparison
  - Make a chart showing total expenses
    - Organize by description, category, quantity, unit cost, total cost
    - Make this chart sortable
    - Calculations must use FUNCTIONS
  - Show where total expenses are going by category
    - Show with a doughnut pie chart
  - Put each trip into its own color coded sheet
  - Remember, these trips are January, May, and October, so the rates should all be different
- FOR ALL THREE TRIPS:
  - Make a chart that shows each trip by month for the whole 2016 year
    - Show total for all 3 trips
    - Show average for all 3 trips
    - Show minimum for all 3 trips
    - Show maximum for all 3 trips
  - Make clear the total budget amount, total expenses, and the difference
    - Include a currency exchange comparison
  - Create a line chart which will show the whole year's travel budget
    - Use markers on the line for each month
  - Put this chart into its own color coded sheet
  - Calculations must use FUNCTIONS
- Each chart must be clearly organized in a logical way
  - Easy to read
  - Easy to understand
  - Nice to look at
  - Utilizing tables, cell styles, and a theme
- **You will upload this document** to Blackboard.

### **{step four} Create a PowerPoint & give an oral presentation**

You will have to present the research you've conducted and discussed in the memo by giving an oral presentation to the Bling President that summarizes the highlights of what you've learned. This is your chance to prove you are the right person for the job. Focus on the most interesting and important information that you think will best help the President understand proper business etiquette and communication at this new global level.

First think about and outline everything you want to say because you only have 3- 4 minutes to say it. You will use a **PowerPoint Presentation** to supplement your oral presentation. **You must present on DATE, unless you have made prior arrangements, otherwise you will receive a 0 for the presentation part.**

**Technical requirements:**

- Provide an oral presentation that has an introduction, a body with key points, and conclusion
- Create something that is visually appealing, remember, you do not want too many words on each slide
- Have a title slide that introduces your topic and at least 2 other slides to support your oral presentation
- Insert at least 2 images
  - Use picture effects for both
  - Animate 1 of the images
- Use at least 1 transition between slides
- **Print** all the slides on one page, using the Handout format, turn in when you give your presentation

You will have **4 minutes maximum\*** to present to the class. Be sure to dress professionally and follow the tips and guidelines for good presentations that we discussed in class.

\*You will not be allowed to go over time, so please practice. Anyone going over time will receive a reduced grade. So be sure to **practice, practice, practice!**

APPENDIX 9:  
Student Learning Outcomes – BUS 221 Financial Accounting Assignment:  
Annual Report Project

**BUS 221: FINANCIAL ACCOUNTING  
BUSINESS DEPARTMENT  
BEDFORD CAMPUS  
HENDERSON HALL**

**ANNUAL REPORT PROJECT**

**Annual Report Project  
Nancy A. Herring, PhD, CPA**

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Annual Report Project | 1  
**Annual Report Project**

The Annual Report Project (ARP) provides you the opportunity to analyze a corporate annual report. You will obtain the annual report of a Fortune 500 company and answer questions regarding

the application of concepts studied in your financial accounting course.

The Annual Report Project:

- ☒ Will increase your interest in financial accounting by allowing you to personally choose the annual report you will review
  - ☒ Provides hands-on exposure to financial statements of real-world companies
  - ☒ Emphasizes the importance of the notes to the financial statements
  - ☒ Provides an opportunity to examine the application of procedures and methods discussed in your accounting textbook
  - ☒ Encourages you to work with spreadsheets
- The Annual Report Project consists of twelve assignments and is designed to be a useful supplement

both for undergraduate financial accounting courses and for introductory financial accounting at the M.B.A. level. The following is a list of the topics covered in each Annual Report Project assignment:

- ☒ ARP 1 Obtaining the Annual Report
- ☒ ARP 2 Company Information
- ☒ ARP 3 Overview of the Annual Report
- ☒ ARP 4 The Balance Sheet
- ☒ ARP 5 The Income Statement
- ☒ ARP 6 Current Assets
- ☒ ARP 7 Long-lived Assets
- ☒ ARP 8 Liabilities
- ☒ ARP 9 Stockholders' Equity
- ☒ ARP 10 Statement of Cash Flow
- ☒ ARP 11 International Financial Reporting Standards
- ☒ ARP 12 Overall Evaluation

## 2 | Annual Report Project

### **ORGANIZATION OF EACH ASSIGNMENT**

Beginning with Assignment 4, each assignment consists of three parts:

- ☒ **THE BASICS** requires you to find information in the annual report and may require the calculation of some financial statement ratios.
- ☒ **FURTHER ANALYSIS** often includes calculating and interpreting financial statement ratios. It also requires comparing these ratios to industry averages.
- ☒ **INFORMATION FOR DECISION MAKING** asks you to evaluate the information obtained in other parts of the assignment.

The Annual Report Project (ARP) works best if each student obtains a different annual report. In your classroom, students can highlight differences and similarities among companies. Even if class discussion is limited, students have the opportunity to learn something about these differences

and similarities as they prepare their assignments and discuss them with each other outside the classroom. They see that terminology, format, and level of disclosure vary. For larger classes, you might have your students work in groups. Each group would examine a different annual

report. Students might also work in industry groups. Each student in a group would examine

an annual report in the same industry as those of other group members.

### **NOTES TO SPECIFIC ASSIGNMENTS**

ARP 1 & 2. The first assignment asks the student to select a Fortune 500 company. This limitation

enhances the likelihood that the report will contain all the disclosures required in the assignments.

Assignment 1 also places some limits on industry type in order to avoid specialized industry practices. Because receipt of the annual reports can take 2 – 3 weeks, it is important that Assignment 1 be completed during the first day or two of the school term. Alternatively, the student

may download the annual report from the company's web site. This is the preferred method of obtaining an annual report. Fortune.com provides links to web sites of Fortune 500 companies.

Because each student is required to obtain a different annual report, the instructor may ask students to e-mail their choices as soon as the annual reports have been ordered. The instructor

can then assign preferred companies to students on a first-come-first-served basis.

Assignments 1 and 2 ask each student to order an annual report for and obtain a profile of each of

three companies. This requirement provides alternative annual reports if (1) the instructor requires

each student to obtain a different annual report and the student's first choice has already been selected by another student, or (2) there is an unforeseen delay in receiving an annual report.

By the time the student prepares Assignment 3, each will have narrowed the focus to one company.

Information for ARP 2 can be obtained from the Internet and business periodicals. Students are not expected to have received their annual reports at this time. Internet search engines have a menu option labeled stock or stock quotes where students can find a company profile which will

include the information required in the assignment. Another useful source for students is fortune.

com.

ARP 3. This assignment provides an overview and a table of contents for later assignments. It helps students familiarize themselves with the content of an annual report. In class discussion the

Annual Report Project | 3

instructor can make note of the optimistic tone of the chairman's letter and the items included in

the management discussion and analysis. More importantly, this assignment provides an opportunity

to discuss management's responsibility for the financial statements, the auditor's responsibility,

the expectation gap problem, internal control and audit committees. Optional Oral Presentation:

If the instructor is seeking an opportunity for students to demonstrate oral communication skills, it may be appropriate at this point to have each student give a brief report about his or her company.

ARP 4 & 5. Instructors will need to refer the students to the discussion of vertical analysis in the financial statement analysis chapter of their textbook for guidance in preparing the common-size balance sheets and income statements.

ARP 6. In-class comparisons of ratios, receivables collection and inventory turnover are useful and interesting. These comparisons also provide an opportunity for the class to discuss the reasonableness of the numbers, given the characteristics of that particular company—for example, the nature of its inventory or its type of customer.

ARP 7. In addition to reviewing plant assets, intangibles and depreciation methods, this assignment asks students to examine cash flow effects related to accounting for long-lived assets.

ARP 8. Here is an opportunity to discuss operating leases and the fact that, although they may fit the definition of a liability, they are not included in the balance sheet. The discussion could include other types of off-balance-sheet financing arrangements. This assignment also addresses cash flow.

ARP 9. The instructor will need to refer the students to the financial highlights (or financial summary) in the annual report for a review of stock performance in recent years. That information, along with the information in the financial statements, will enable the students to complete the required calculations.

ARP 10. This assignment examines the statement of cash flows (SCF) and provides an opportunity for students to look at the relationship between the SCF and the balance sheet and between the SCF and the income statement. It also asks students to examine the primary differences between the cash-based numbers and the accrual-based numbers. In addition, the assignment asks students to compute some amounts for operating activities as they would appear if the direct method were used.

ARP 11. This assignment introduces International Financial Reporting Standards (IFRS) and provides an opportunity for students to assess the financial statement impact of IFRS adoption.

Each student will also examine the annual report of a company in the European Union (EU).

ARP 12. This assignment asks students to analyze information contained in the previous assignments.

The final analysis can be written and/or oral. If a group of students have analyzed companies within the same industry, a group presentation may be appropriate. Alternatively, the instructor may wish to limit this assignment to a consideration of the accounting methods chosen by the company.

### ***USING THE ANNUAL REPORT PROJECT IN THE CLASSROOM***

The Annual Report Project can be adapted to meet the needs of instructors at institutions of various sizes, with large and small classes, and with various instructor course loads. There is flexibility in the amount of class time devoted to the assignments. The instructor will probably wish to

#### **4 | Annual Report Project**

schedule some time to discuss management's responsibility for the financial statements, the auditor's responsibility, comparison of accounting methods used, and some comparison of ratios.

### ***CUSTOMIZING THE ANNUAL REPORT PROJECT***

The assignments are organized so that the instructor can adjust the requirements as needed for the

specific course. Beginning with Assignment 4, each assignment is divided into The Basics, Further

Analysis, and Information for Decision Making. The purpose of this division is to allow the instructor to ask students to complete only the first or the first two sections for some of the assignments,

as appropriate to the structure of the course. The amount of time required by the project can thereby be adjusted as needed. The instructor will want to make students aware that some annual reports may not contain every item required to complete the assignments. If a student

determines that there is insufficient data to answer a particular question, he or she should indicate that conclusion in the space provided for the answer. Students may also require additional pages to answer some questions.

#### Annual Report Project | 5

### **ANNUAL REPORT PROJECT**

#### **ASSIGNMENT 1**

### ***OBTAINING THE ANNUAL REPORT***

Obtain the most recent annual reports of three U.S. corporations which are Fortune 500 companies

and are traded on a national stock exchange (NYSE, NASDAQ). You will obtain three annual reports so that you will have an alternate if you are unable to use your first choice.

**Do not select a public utility, financial institution or brokerage firm, insurance company, co-operative or government entity. In addition, please note that summary annual reports are not acceptable.**

*The completion of your annual report project assignments will be easier if you obtain a printed copy of the annual report rather than retrieve the report from an Internet site. However, your instructor may allow you to download the annual report from the company Web site.*

A useful resource is **fortune.com**. This site provides links to the Web sites of Fortune 500 companies.

To obtain a printed copy of the annual report, contact the company's Investor Relations department.

**OTHER USEFUL SOURCES ARE:**

- ☐ The Investor Relations Information Network (www.irin.com)
- ☐ The Wall Street Journal Annual Reports Service (www.icbinc.com)
- ☐ The Public Register's Annual Report Service (www.prars.com) (800-4-ANNUAL)
- ☐ Barron's Annual Report and Earnings Service (www.icbinc.com) (800-965-2929).

**1. Choosing a company**

*Choose companies in which you are interested. Perhaps the company has been featured in the news lately. Perhaps you own stock in the company. Perhaps you would like to own stock in the company. If you want to look at a list of possibilities, find a copy of the April issue of Fortune magazine which lists the Fortune 500 or try [www.fortune.com](http://www.fortune.com)*

**2. Place your order. Answer the following questions.**

Names of companies chosen: (Remember that you will conduct a thorough analysis of one of the companies. Please list the companies in the order of your preference.)

Company Fortune 500 Rank

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

Date you placed your order: \_\_\_\_\_

**6 | Annual Report Project**

How did you request the annual report? (Indicate phone number called, Internet address, etc.)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

Why did you select these particular companies?

- a.

- b.
- c.

Annual Report Project | 7  
**ANNUAL REPORT PROJECT**  
**ASSIGNMENT 2**

**INFORMATION ABOUT THE COMPANY**

NOTE: Make two additional copies of this annual report project form. Then complete and submit

Assignment 2 for each of the three companies you chose in Assignment 1. If you have not yet received the annual reports, use the Internet to answer the following questions.

**GUIDANCE FOR THIS AND THE FOLLOWING ASSIGNMENTS:**

- *When a question asks you to explain, describe, analyze, etc., use complete sentences and well-organized paragraphs.*
- *The space provided for the answer indicates the expected length of your answer.*

**1. Name of company chosen:** \_\_\_\_\_

**2. Information about the company:**

What is the industry classification for the company (according to *Fortune* or the Internet site you are using)?

Describe the nature of the company's business.

List the company's primary products or services (use brand names where available).

What is the address of the company's corporate headquarters?

What is the address of the company's Web site?

List other countries in which the company operates:

**8 | Annual Report Project**

What were the company's revenues for the most recent fiscal year? \_\_\_\_\_

Who is the chairman of the company's board of directors?

\_\_\_\_\_  
Who is the company's CEO?

**3. Provide the following market data:**

On what stock exchange is the company's stock traded?

\_\_\_\_\_  
What is the ticker symbol for the company? \_\_\_\_\_

What was the price of the company's stock at the end of one day during this past week?

Price: \_\_\_\_\_ Date: \_\_\_\_\_

What were the lowest and highest stock prices during the past year?

52-week low: \_\_\_\_\_ 52-week high: \_\_\_\_\_

**4. Obtain a copy of an article about the company. Attach a copy of the article.**

Name of article: \_\_\_\_\_

Source of article (name of magazine or newspaper, date, page numbers):

\_\_\_\_\_  
Summarize the article. Use complete sentences and well-organized paragraphs. Your summary should be no fewer than 100 words in length.

Annual Report Project | 9  
**ANNUAL REPORT PROJECT**  
**ASSIGNMENT 3**

**OVERVIEW OF ANNUAL REPORT**

*By now you have received your annual reports and have narrowed your focus to one company. This assignment will provide both an overview of the annual report of your chosen company and a table of contents to help you complete future assignments more efficiently.*

\*\*\*\*\*

**HELPFUL ADVICE:** You will be able to complete the remaining assignments more readily if you take the time now to:

- a. Make copies of pages 2 and 3 of this assignment after you have completed them. It will serve as your table of contents for future assignments.
- b. Make a copy of the five-year (or more) summary of selected financial data from your annual report. It contains several key numbers that will be required in future assignments.
- c. Print industry comparisons. One useful Web site is Reuters.com.\*
  - Under the “News and Markets” tab, click on Stocks.
  - Enter either the ticker symbol or company name.
  - Across the top of the next screen, you will see an extensive menu of options for obtaining more information about your company. You will find much of this useful.
  - For ratios and industry comparisons, choose the Financials option from this menu.
  - Print the resulting pages.

\*\*\*\*\*

1. Staple these three items together and place them and your company’s annual report in the front pocket of a folder that has both pockets and prongs.
2. Write your name on the outside of the folder in the upper right-hand corner.
3. As you complete your Annual Report Project assignments, place them in the prongs with the most recent assignment on top.

\*\*\*\*\*

\*Another useful Web site is finance.yahoo.com

Name of company chosen: \_\_\_\_\_

Balance sheet date: \_\_\_\_\_

**1. REVIEW THE ANNUAL REPORT THAT YOU HAVE RECEIVED. IT WILL CONTAIN SEVERAL SECTIONS:**

a. **FINANCIAL HIGHLIGHTS.** This section provides a summary of selected financial results over a number of years. You may find two schedules providing highlights: one brief summary near the front of the annual report and a more detailed summary in the financial section.

**Market Update:**

(Stock price this week)

Price \_\_\_\_\_ on

date \_\_\_\_\_

**10 | Annual Report Project**

This second schedule may be called Five-Year Summary of Selected Financial Data.

Note its page number here. **Page(s)** \_\_\_\_\_

**b. THE CHAIRMAN’S LETTER.** This letter provides the chairman’s overview of the past year and developments which will affect the next year. **Page(s)** \_\_\_\_\_

**c. THE COMPANY, ITS PRODUCTS, ITS EMPLOYEES.** This section may contain a number of color photographs and will highlight the products and accomplishments of the company. **Pages** \_\_\_\_\_

**d. MANAGEMENT DISCUSSION AND ANALYSIS.** This section discusses operating results, industries in which the company operates, financing and investing activities, significant events, trends and developments. **Page** \_\_\_\_\_

**e. THE FINANCIAL STATEMENTS AND NOTES TO THE FINANCIAL STATEMENTS.**

This section contains the balance sheet(also called statement of financial position), income statement, statement of cash flows and statement of stockholders’ equity. The accompanying notes, as indicated at the bottom of each of the above statements, are an integral part of the financial statements. The financial statements cannotbe understood without reference to the notes.

*The financial statements and **Balance Sheet Page** \_\_\_\_\_  
accompanying notes will be the **Income Statement Page** \_\_\_\_\_  
focus of your Annual Report Project. **Statement of Cash Flows Page** \_\_\_\_\_  
**Statement of Stockholders’ Equity Page** \_\_\_\_\_*

**Notes to the financial statements:**

*(Include ALL notes. Attach an additional page if necessary.)*

*Summary of significant accounting policies Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Inventories Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Plant assets Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Long-term debt Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Income taxes Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Employee benefit plans Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Commitments and contingencies Note # \_\_\_\_\_ Page \_\_\_\_\_*

**Other notes:**

Title of note Note # \_\_\_\_\_ Page \_\_\_\_\_

**f. MANAGEMENT REPORT ON INTERNAL CONTROL Page** \_\_\_\_\_

**g. THE INDEPENDENT AUDITOR’S REPORT:**

**REPORT ON INTERNAL CONTROL Page** \_\_\_\_\_

**REPORT ON THE FINANCIAL STATEMENTS Page** \_\_\_\_\_

**h. Other:**

\_\_\_\_\_ Page \_\_\_\_\_  
\_\_\_\_\_ Page \_\_\_\_\_  
\_\_\_\_\_ Page \_\_\_\_\_

**2. REVIEW THE CHAIRMAN’S LETTER TO THE SHAREHOLDERS.**

Summarize the major points made in the letter.

Page(s) on which letter appears: \_\_\_\_\_

Annual Report Project | 11

**Locate the management report(s) and the independent auditor's report(s).**

*Answer the following questions. Page(s)\_\_\_\_\_*

- a) Who is responsible for the preparation and integrity of the financial statements?
- b) Does the company maintain a system of internal controls? Why?
- c) Does the company have an audit committee? \_\_\_\_\_ What is its purpose?
- d) What is the name of the independent public accountant (auditor)?

**(Note: There are two independent auditor's reports: (1) a report on internal control, and (2) a report**

**on the financial statements. The following questions relate to the financial statement audit.)**

- e) According to the auditor's report on the financial statements, what is the auditor's responsibility?
- f) According to the audit report, what is an audit?
- g) Summarize the auditor's opinion.

12 |

***Annual Report Project***

***Nancy A. Herring, PhD, CPA***

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Annual Report Project | 1

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☑ ARP 2 Company Information

☑ ARP 3 Overview of the Annual Report

☑ ARP 4 The Balance Sheet

☑ ARP 5 The Income Statement

☑ ARP 6 Current Assets

☑ ARP 7 Long-lived Assets

☑ ARP 8 Liabilities

☑ ARP 9 Stockholders' Equity

☑ ARP 10 Statement of Cash Flow

☑ ARP 11 International Financial Reporting Standards

☑ ARP 12 Overall Evaluation

**2 | Annual Report Project**

#### ***ORGANIZATION OF EACH ASSIGNMENT***

Beginning with Assignment 4, each assignment consists of three parts:

☑ **THE BASICS** requires you to find information in the annual report and may require the calculation of some financial statement ratios.

☑ **FURTHER ANALYSIS** often includes calculating and interpreting financial statement ratios. It also requires comparing these ratios to industry averages.

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### ***NOTES TO SPECIFIC ASSIGNMENTS***

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Assignment 1 also places some limits on industry type in order to avoid specialized industry practices. Because receipt of the annual reports can take 2 – 3 weeks, it is important that Assignment 1 be completed during the first day or two of the school term. Alternatively, the student may download the annual report from the company's web site. This is the preferred method of obtaining an annual report. Fortune.com provides links to web sites of Fortune 500 companies.

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three companies. This requirement provides alternative annual reports if (1) the instructor requires

each student to obtain a different annual report and the student's first choice has already been selected by another student, or (2) there is an unforeseen delay in receiving an annual report.

By the time the student prepares Assignment 3, each will have narrowed the focus to one company.

Information for ARP 2 can be obtained from the Internet and business periodicals. Students are not expected to have received their annual reports at this time. Internet search engines have a menu option labeled stock or stock quotes where students can find a company profile which will

include the information required in the assignment. Another useful source for students is fortune.

com.

ARP 3. This assignment provides an overview and a table of contents for later assignments. It helps students familiarize themselves with the content of an annual report. In class discussion the

Annual Report Project | 3

instructor can make note of the optimistic tone of the chairman's letter and the items included in

the management discussion and analysis. More importantly, this assignment provides an opportunity

to discuss management's responsibility for the financial statements, the auditor's responsibility, the expectation gap problem, internal control and audit committees. Optional Oral

Presentation:

If the instructor is seeking an opportunity for students to demonstrate oral communication skills, it may be appropriate at this point to have each student give a brief report about his or her

company.

ARP 4 & 5. Instructors will need to refer the students to the discussion of vertical analysis in the financial statement analysis chapter of their textbook for guidance in preparing the common-size

balance sheets and income statements.

ARP 6. In-class comparisons of ratios, receivables collection and inventory turnover are useful and interesting. These comparisons also provide an opportunity for the class to discuss the reasonableness

of the numbers, given the characteristics of that particular company—for example, the nature of its inventory or its type of customer.

ARP 7. In addition to reviewing plant assets, intangibles and depreciation methods, this assignment

asks students to examine cash flow effects related to accounting for long-lived assets.

ARP 8. Here is an opportunity to discuss operating leases and the fact that, although they may fit

the definition of a liability, they are not included in the balance sheet. The discussion could include

other types of off-balance-sheet financing arrangements. This assignment also addresses cash flow.

ARP 9. The instructor will need to refer the students to the financial highlights (or financial summary) in the annual report for a review of stock performance in recent years. That information,

along with the information in the financial statements, will enable the students to complete the required calculations.

ARP 10. This assignment examines the statement of cash flows (SCF) and provides an opportunity

for students to look at the relationship between the SCF and the balance sheet and between the SCF and the income statement. It also asks students to examine the primary differences between

the cash-based numbers and the accrual-based numbers. In addition, the assignment asks students to compute some amounts for operating activities as they would appear if the direct method were used.

ARP 11. This assignment introduces International Financial Reporting Standards (IFRS) and provides an opportunity for students to assess the financial statement impact of IFRS adoption. Each student will also examine the annual report of a company in the European Union (EU).

ARP 12. This assignment asks students to analyze information contained in the previous assignments.

The final analysis can be written and/or oral. If a group of students have analyzed companies within the same industry, a group presentation may be appropriate. Alternatively, the instructor

may wish to limit this assignment to a consideration of the accounting methods chosen by the company.

### ***USING THE ANNUAL REPORT PROJECT IN THE CLASSROOM***

The Annual Report Project can be adapted to meet the needs of instructors at institutions of various

sizes, with large and small classes, and with various instructor course loads. There is flexibility in the amount of class time devoted to the assignments. The instructor will probably wish to

**4 | Annual Report Project**

schedule some time to discuss management's responsibility for the financial statements, the auditor's

responsibility, comparison of accounting methods used, and some comparison of ratios.

### ***CUSTOMIZING THE ANNUAL REPORT PROJECT***

The assignments are organized so that the instructor can adjust the requirements as needed for the

specific course. Beginning with Assignment 4, each assignment is divided into The Basics, Further

Analysis, and Information for Decision Making. The purpose of this division is to allow the instructor to ask students to complete only the first or the first two sections for some of the assignments,

as appropriate to the structure of the course. The amount of time required by the project can thereby be adjusted as needed. The instructor will want to make students aware that some annual reports may not contain every item required to complete the assignments. If a student

determines that there is insufficient data to answer a particular question, he or she should indicate that conclusion in the space provided for the answer. Students may also require additional

pages to answer some questions.

Annual Report Project | **5**

## **ANNUAL REPORT PROJECT**

### **ASSIGNMENT 1**

#### ***OBTAINING THE ANNUAL REPORT***

Obtain the most recent annual reports of three U.S. corporations which are Fortune 500 companies and are traded on a national stock exchange (NYSE, NASDAQ). You will obtain three annual reports so that you will have an alternate if you are unable to use your first choice.

**Do not select a public utility, financial institution or brokerage firm, insurance company, co-operative or government entity. In addition, please note that summary annual reports are not acceptable.**

*The completion of your annual report project assignments will be easier if you obtain a printed copy of the annual report rather than retrieve the report from an Internet site. However, your instructor may allow you to download the annual report from the company Web site.*

A useful resource is **fortune.com**. This site provides links to the Web sites of Fortune 500 companies.

To obtain a printed copy of the annual report, contact the company's Investor Relations department.

**OTHER USEFUL SOURCES ARE:**

- ☐ The Investor Relations Information Network ([www.irin.com](http://www.irin.com))
- ☐ The Wall Street Journal Annual Reports Service ([www.icbinc.com](http://www.icbinc.com))
- ☐ The Public Register's Annual Report Service ([www.prars.com](http://www.prars.com)) (800-4-ANNUAL)
- ☐ Barron's Annual Report and Earnings Service ([www.icbinc.com](http://www.icbinc.com)) (800-965-2929).

**1. Choosing a company**

*Choose companies in which you are interested. Perhaps the company has been featured in the news lately. Perhaps you own stock in the company. Perhaps you would like to own stock in the company. If you want to look at a list of possibilities, find a copy of the April issue of Fortune magazine which lists the Fortune 500 or try [www.fortune.com](http://www.fortune.com)*

**2. Place your order. Answer the following questions.**

Names of companies chosen: (Remember that you will conduct a thorough analysis of one of the companies. Please list the companies in the order of your preference.)

Company Fortune 500 Rank

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

Date you placed your order: \_\_\_\_\_

**6 | Annual Report Project**

How did you request the annual report? (Indicate phone number called, Internet address, etc.)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

Why did you select these particular companies?

- a.
- b.
- c.

**ANNUAL REPORT PROJECT**

**ASSIGNMENT 2**

**INFORMATION ABOUT THE COMPANY**

NOTE: Make two additional copies of this annual report project form. Then complete and submit

Assignment 2 for each of the three companies you chose in Assignment 1. If you have not yet received the annual reports, use the Internet to answer the following questions.

**GUIDANCE FOR THIS AND THE FOLLOWING ASSIGNMENTS:**

- *When a question asks you to explain, describe, analyze, etc., use complete sentences and well-organized paragraphs.*

- *The space provided for the answer indicates the expected length of your answer.*

**1. Name of company chosen:** \_\_\_\_\_

**2. Information about the company:**

What is the industry classification for the company (according to *Fortune* or the Internet site you are using)?

Describe the nature of the company's business.

List the company's primary products or services (use brand names where available).

What is the address of the company's corporate headquarters?

What is the address of the company's Web site?

List other countries in which the company operates:

**8 | Annual Report Project**

What were the company's revenues for the most recent fiscal year? \_\_\_\_\_

Who is the chairman of the company's board of directors?

\_\_\_\_\_  
Who is the company's CEO?

**3. Provide the following market data:**

On what stock exchange is the company's stock traded?

\_\_\_\_\_  
What is the ticker symbol for the company? \_\_\_\_\_

What was the price of the company's stock at the end of one day during this past week?

Price: \_\_\_\_\_ Date: \_\_\_\_\_

What were the lowest and highest stock prices during the past year?

52-week low: \_\_\_\_\_ 52-week high: \_\_\_\_\_

**4. Obtain a copy of an article about the company. Attach a copy of the article.**

Name of article: \_\_\_\_\_

Source of article (name of magazine or newspaper, date, page numbers):

\_\_\_\_\_  
Summarize the article. Use complete sentences and well-organized paragraphs. Your summary should be no fewer than 100 words in length.

### ASSIGNMENT 3

#### OVERVIEW OF ANNUAL REPORT

*By now you have received your annual reports and have narrowed your focus to one company. This assignment will provide both an overview of the annual report of your chosen company and a table of contents to help you complete future assignments more efficiently.*

\*\*\*\*\*

**HELPFUL ADVICE:** You will be able to complete the remaining assignments more readily if you take the time now to:

a. Make copies of pages 2 and 3 of this assignment after you have completed them. It will serve as your table of contents for future assignments.

b. Make a copy of the five-year (or more) summary of selected financial data from your annual report. It contains several key numbers that will be required in future assignments.

c. Print industry comparisons. One useful Web site is Reuters.com.\*

- Under the “News and Markets” tab, click on Stocks.
- Enter either the ticker symbol or company name.
- Across the top of the next screen, you will see an extensive menu of options for obtaining more information about your company. You will find much of this useful.
- For ratios and industry comparisons, choose the Financials option from this menu.

• Print the resulting pages.

\*\*\*\*\*

1. Staple these three items together and place them and your company’s annual report in the front pocket of a folder that has both pockets and prongs.

2. Write your name on the outside of the folder in the upper right-hand corner.

3. As you complete your Annual Report Project assignments, place them in the prongs with the most recent assignment on top.

\*\*\*\*\*

\*Another useful Web site is [finance.yahoo.com](http://finance.yahoo.com)

Name of company chosen: \_\_\_\_\_

Balance sheet date: \_\_\_\_\_

#### **1. REVIEW THE ANNUAL REPORT THAT YOU HAVE RECEIVED. IT WILL CONTAIN SEVERAL SECTIONS:**

a. **FINANCIAL HIGHLIGHTS.** This section provides a summary of selected financial results over a number of years. You may find two schedules providing highlights: one brief summary near the front of the annual report and a more detailed summary in the financial section.

#### **Market Update:**

(Stock price this week)

Price \_\_\_\_\_ on

date \_\_\_\_\_

#### **10 | Annual Report Project**

This second schedule may be called Five-Year Summary of Selected Financial Data.

Note its page number here. **Page(s)**\_\_\_\_\_

**b. THE CHAIRMAN’S LETTER.** This letter provides the chairman’s overview of the past year and developments which will affect the next year. **Page(s)**\_\_\_\_\_

**c. THE COMPANY, ITS PRODUCTS, ITS EMPLOYEES.** This section may contain a number of color photographs and will highlight the products and accomplishments of the company. **Pages**\_\_\_\_\_

**d. MANAGEMENT DISCUSSION AND ANALYSIS.** This section discusses operating results, industries in which the company operates, financing and investing activities, significant events, trends and developments. **Page**\_\_\_\_\_

**e. THE FINANCIAL STATEMENTS AND NOTES TO THE FINANCIAL STATEMENTS.**

This section contains the balance sheet(also called statement of financial position), income statement, statement of cash flows and statement of stockholders’ equity. The accompanying notes, as indicated at the bottom of each of the above statements, are an integral part of the financial statements. The financial statements cannotbe understood without reference to the notes.

*The financial statements and **Balance Sheet Page**\_\_\_\_\_ accompanying notes will be the **Income Statement Page**\_\_\_\_\_ focus of your Annual Report Project. **Statement of Cash Flows Page**\_\_\_\_\_ **Statement of Stockholders’ Equity Page**\_\_\_\_\_*

**Notes to the financial statements:**

*(Include ALL notes. Attach an additional page if necessary.)*

*Summary of significant accounting policies Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Inventories Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Plant assets Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Long-term debt Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Income taxes Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Employee benefit plans Note # \_\_\_\_\_ Page \_\_\_\_\_*

*Commitments and contingencies Note # \_\_\_\_\_ Page \_\_\_\_\_*

**Other notes:**

Title of note Note # \_\_\_\_\_ Page \_\_\_\_\_

**f. MANAGEMENT REPORT ON INTERNAL CONTROL Page**\_\_\_\_\_

**g. THE INDEPENDENT AUDITOR’S REPORT:**

**REPORT ON INTERNAL CONTROL Page**\_\_\_\_\_

**REPORT ON THE FINANCIAL STATEMENTS Page**\_\_\_\_\_

**h. Other:**

\_\_\_\_\_ Page \_\_\_\_\_  
\_\_\_\_\_ Page \_\_\_\_\_  
\_\_\_\_\_ Page \_\_\_\_\_

**2. REVIEW THE CHAIRMAN’S LETTER TO THE SHAREHOLDERS.**

**Summarize the major points made in the letter.**

Page(s) on which letter appears: \_\_\_\_\_

**Locate the management report(s) and the independent auditor's report(s).**

*Answer the following questions. Page(s) \_\_\_\_\_*

- a) Who is responsible for the preparation and integrity of the financial statements?
- b) Does the company maintain a system of internal controls? Why?
- c) Does the company have an audit committee? \_\_\_\_\_ What is its purpose?
- d) What is the name of the independent public accountant (auditor)?

**(Note: There are two independent auditor's reports: (1) a report on internal control, and (2) a report**

**on the financial statements. The following questions relate to the financial statement audit.)**

- e) According to the auditor's report on the financial statements, what is the auditor's responsibility?
- f) According to the audit report, what is an audit?
- g) Summarize the auditor's opinion.

12 |

## Assignment X

### **Zetar PLC and Tootsie Roll Industries Inc.**

<http://www.zetarplc.com/LinkClick.aspx?fileticket=7vYwYM7qJYw%3d&tabid=40>

<http://www.tootsie.com/financials/>

In this assignment you will examine the Annual Reports of Zetar PLC and Tootsie Roll for 2012. Use the above links to see the annual reports of the two companies and answer the following:

#### **I. Zetar PLC**

- A) What is the business of this corporation?
- B) Where is this company headquartered? Where are the markets that this company serves?
- C) What are the major brands of this company?
- D) What are 4 Principal Risks faced by this company? Briefly explain each of these risks in your own words.
- E) Who is the auditor of this company? Where are the auditors' headquarters?
- F) What is the Net Income (or Net Profit) of this company?
- G) What are the Total Current Assets for this company?
- H) What are the Total Non-Current Assets for this company?
- I) What are the Total Assets for this company?

#### **II. Tootsie Roll Industries Inc.**

- A) What is the business of this corporation?
- B) Where is this company headquartered? Where are the markets that this company serves?
- C) What are the major brands of this company?
- D) What are 4 Principal Risks faced by this company? Briefly explain each of these risks in your own words.
- E) Who is the auditor of this company? Where are the auditors' headquarters?
- F) What is the Net Income (or Net Profit) of this company?
- G) What are the Total Current Assets for this company?

- H) What are the Total Non-Current Assets for this company?  
I) What are the Total Assets for this company?

III. Income Statement:

- A. What are the similarities in the format of the Income Statements of the 2 companies?  
B. The following  
B. What, if any, are the differences in the format of the Income Statements of the 2 companies?

IV. Balance Sheet:

- A. What are the similarities in the format of the Balance Sheet of the 2 companies?  
B. What, if any, are the differences in the format of the Balance Sheet of the 2 companies?

V. IASB and FASB.

- A. What are the full forms of FASB and IASB.  
B. Do these companies follow the guidelines of FASB or IASB?  
C. Where are the headquarters of FASB and IASB?  
C. List some countries that use IASB for its accounting standards, and name the countries that use FASB for its accounting standards.  
D. What is the difference in standards of FASB and IASB?  
E. What are the reasons for convergence of the standards of FASB and IASB?  
F. Explain at least 4 benefits from this convergence.  
G. Explain at least 4 limitations of this convergence.  
H. Elaborately explain your views on this convergence. Are you for this convergence or against it? Why?

Your responses should be presented in a MS WORD document.

Times New Roman Font

1" margins

Double spaced.

Please use complete sentences.

You may use tables.

Include a cover sheet

Page numbers (not on cover sheet)

Citations required.

## BUS 2XX Managerial Accounting

### Assignment 1: Jamie's Hat Shop

Jamie is a retailer of hats. Jamie sells each hat for \$25. Expected sales for the month are: 100 hats in May, 150 hats in June, 200 hats in July, 210 hats in August, 250 hats in September, 300 hats in October. 30% of Jamie's customers purchase on credit, and they are given a credit of one month.

Jamie purchases each hat for \$15. Jamie's suppliers give Jamie 60 days credit. Jamie wishes to maintain an ending inventory each month equaling 20% of next month's sales.

Jamie has the following outgoings per month:

Rent	\$120	50% selling, 50% general
Utilities	\$ 200	80% selling
Salaries	\$500	60% selling
Depreciation	\$200	70% selling
Advertising	\$400	
Commission	\$2 per hat	

Jamie has prepaid the rent for the entire year in January. Jamie pays salaries and utilities in the month when they are incurred, and pays all the other expenses in the following month. Jamie also pays \$300 in dividends each month.

Jamie's ending cash balance for the month of June is \$20,000.

Prepare the Master Budget for the 3<sup>rd</sup> Quarter. Additionally, prepare the budgeted income statement and the CVP income statement for the 3<sup>rd</sup> quarter.

## Assignment 2: California Surfing Company

California Surfing, a merchandiser for surf boards is beginning its sales operations on January 1, 2016. The selling price for each board is \$30. Expected sales, in units, are: January 400, February 350, March 500, April 800. 20% of customers purchase on credit, and they are given a credit of two months.

The cost price of each board is \$10. California Surfing has negotiated credit terms with its vendors for 30 days. The company wishes to maintain an ending inventory each month equaling 30% of next month's sales.

The following are the expenditures per month:

Rent	\$2000	90% selling, 10% general
Utilities	\$ 400	60% selling
Salaries	\$5000	70% selling
Depreciation	\$1000	50% selling
Advertising	\$500	
Commission	\$3 per board	

The company plans to prepay the rent for the entire first quarter in January. Salaries and Advertising are paid in the month in which they are incurred. All the other expenses are paid the following month, except commission, which is paid after 2 months. Dividends \$ 500 are paid each month.

The beginning cash balance for January is \$50,000. California Surf Board wishes to maintain a cash balance of at least \$5,000 each month and can borrow funds if necessary.

Prepare the Master Budget for the 1st Quarter. Additionally, prepare the budgeted income statement and the CVP income statement for the 1st quarter.

Your Master Budget must be prepared on an Excel Spreadsheet. It should have multiple worksheets – 1) Key Information Sheet and 2) Sales Budget 3) Purchases Budget 4) Selling Expenses Budget 5) General and Administrative Expenses Budget 6) Cash Budget 7) Budgeted Income Statement 8) CVP Income Statement with break even analysis. All the worksheets should be renamed appropriately.

All the worksheets (excluding worksheet 1) should be 100% sensitive with respect to the numbers. (NO NUMBERS SHOULD BE TYPED IN THE SECOND WORK SHEET).

2 sets of printouts -- one with numbers, the second with formulae (press control~ or use show formulas and then print)

Please have one cover sheet with relevant details.

### Assignment 3:

We have completed Allison, a Master Budget. Now you will be placed in groups of four. Together you are to create a Master Budget for an event. You will need to use Excel to create the following budgets with supporting schedules as we did with Problem Allison:

Sales Budget  
Direct Materials Purchases Budget, Overhead (all ONE Budget)  
Cost of Goods Sold Budget  
Ending Inventory  
Cash Budget  
Pro Forma Income Statement

The budget should be created on one Excel Workbook with individual sheets for each budget. You will need to provide supporting data for all schedules.

After completion of the budget, you will present your budget and supporting documentation will be submitted to me (you may give me a web link or hard copy paper). You will need to convince management why your project should be chosen over others. Here are some criteria to follow:

The project should be profitable and realistic.  
All event information needs to be clearly documented and submitted. I will verify all your numbers. For example if you are purchasing paper products at BJ's Wholesale

The following is an example of a scenario:

Our company MCC Inc is hosting an event for students graduating this spring. You will need to create the budgets above to accommodate this event. I expect that you will provide all guests with a dinner and entertainment.

Create the menu and the cost of each item. Be all inclusive from the menu to the dinner napkins. Not only will you create a menu for the event, and but must entertain the guests in some manner and should provide costs for this as well.

Supporting cost documentation should be submitted. You may use the internet to obtain the information. In addition, you are expected to arrive at a sales price for each ticket to the event. Do not just make an event with elegant dining and entertainment with the price of the ticket being one that will not sell due to price or lack of interest. You do not have to limit ticket sales to MCC students. This should be realistic. You should not plan that you could not do yourself. For example, entertainment such as having Taylor Swift perform is not realistic. You could not get her to come to Lowell on your own (unless she is your distant cousin and owes you a favor). This event should be something you could actually do yourself.

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