MGMT 304 - 102 & 104
Strategic Management
Fall 2018

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Office Location: Schreiber Center 822
Office Hours: Monday/Wednesday 3-5 PM or by appointment
Meeting Days & Room: Section 102 – TuTh 11:30-12:45 AM, Schreiber 201
Section 104 – TuTh 2:30-3:45 AM, Corboy 207

Course Description
This is a capstone course that analyzes the responsibilities of general management in formulating, communicating and implementing a strategic plan. Through case studies, the course applies the principles of strategic analysis to business situations so as to integrate all of the core courses in the undergraduate business program.

Outcomes: Students will develop executive and general management skills through an understanding of how the various functions of an organization operate as a whole. Students will also build their skills in conducting strategic analyses in a variety of industries and competitive situations and gain a stronger understanding of the competitive challenges of the market environment. Pre-requisites: MGMT 201, MARK 201, FINC 332, OMPG/ISOM 332 with grades of C- or better. Senior standing or above.

Course Overview
Strategic decision makers continually respond to complex and evolving situations, both internal and external to the firm. This class is intended to develop a general management perspective, which incorporates the different functional areas into an overall competitive strategy by taking into account complex and uncertain situations. By the end of the course, you should be able to analyze strategic problems and opportunities in an integrative manner.

Course Objectives and Learning Outcomes
1. Sharpen your skills in analyzing strategic issues, opportunities and challenges through cases and class materials, and gain a systematic and concrete understanding of various theories and frameworks,
2. Refine writing and critical discussion and communication skills,
3. Learn and experience different kinds of leadership through course materials and group work, and reflect on what kind of colleague and leader you aspire to be.

Required Materials
2. Case Packet – A case packet will be available to purchase online. More details to be announced.
3. Other materials include academic papers, book chapters, news articles, and videos. Please check Sakai for weekly assignments.
**Deliverables and Evaluation of Course Performance:** Your grade in this course will be based on the following deliverables, weighted as follows:

1. Class participation & Attendance 10%
2. Short reports of recent news (2 times) 5%
3. Individual project 5%
4. Exam #1 – Midterm exam 20%
5. Exam #2 – Final exam 20%
6. Group project 40%

**Grading:** The following grading scale distribution will be used to determine your grades:

- **A** 100-94%
- **A-** 93-90%
- **B+** 89-87%
- **B** 86-83%
- **B-** 82-80%
- **C+** 79-77%
- **C** 76-73%
- **C-** 72-70%
- **D+** 69-67%
- **D** 66-60%
- **F** 59% and below

**Important dates and deadlines:**

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<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Details</th>
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<tbody>
<tr>
<td>September 19th</td>
<td>Group Project Phase 1 due (one per group)</td>
<td>Submit on Sakai</td>
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<td>September 27th</td>
<td>Individual project short presentations</td>
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<td>October 11th</td>
<td>Mid-term exam</td>
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<tr>
<td>October 22nd</td>
<td>Group Project Phase 2 due (one per group)</td>
<td>Submit on Sakai</td>
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<td>October 25th</td>
<td>Group Project Presentation #1 (Presentation for Phase 1 &amp; 2)</td>
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<td>December 3rd</td>
<td>Group project Phase 3 &amp; Conclusion due (one per group)</td>
<td>Team member contribution #2 due (individual submission)</td>
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<td>December 6th</td>
<td>Group Project Final Presentations</td>
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<td>December 11th &amp;</td>
<td>Final exams:</td>
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<td>15th</td>
<td>- Section 102: December 11 (Tuesday): 9-11am</td>
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<td></td>
<td>- Section 104: December 15 (Saturday): 4:15-6:15pm</td>
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**Classroom conduct:** All students in class must treat others with respect and conduct themselves in a way that does not unreasonably interfere with the learning environment.

- **Electronic Devices** – Electronic devices are strongly discouraged in the classroom unless instructed otherwise for in-class exercises or group work.
- **Leaving early.** If there is an urgent reason to leave class early, let me know in advance.

These are examples of distracting behavior. Students who distract the learning environment will be provided reasonable warning of the consequences of such conduct (including a verbal reminder/emailed note, reporting to the appropriate university authorities). Repetition of behavior not related to the lecture (e.g., internet browsing, instant messaging, reading/writing unrelated to class, repeatedly leaving class early) will result in grades being deducted up to a maximum of 5 points.
Deliverables: Details

1) **Class Participation & Attendance (10%)**. Class participation by each student is an essential part of the learning process in this course. Your insights and comments during class discussions will help your peers in this process. Also, you will find that your thoughts and logics crystalize as you vocalize your thoughts.
   - **Grading**: Your grade in class participation will be based on both the **quantity and quality** of your participation. I will evaluate your participation after each class. Please note that contributions are **not** equivalent to only attending class or merely talking in class.
   - **You are expected to attend ALL class sessions in order to pass the course**.
   - **Missing classes without notice will lead to deductions in your grade. Email me before class if an unavoidable emergency or conflicts prevent you from attending the class**.

2) **Short reports of recent news (2 times, 5%)**. At the beginning of each class, assigned students will individually give a brief report on current news relating to the subject of the class session.
   - The report should include a brief overview of the news article, how it relates to the subject matter, and what can be learned about the relationship between the business and society.
   - Please submit the news article to youm@luc.edu before class starts.

3) **Individual project (5%)**. There has been increasing attention towards empathy in the workplace (e.g., empathy as an essential skill for effective leadership, empathy as a source for innovation). This individual project is an attempt to increase and strengthen our empathy by challenging ourselves and walking in others’ shoes. **You have the option to develop this into the group project**.
   - You will volunteer at a nonprofit organization before Sep. 27, 2018.
   - On Sep. 27, 2018, you will give a short presentation (5 minutes) of where you volunteered and what you have learned through that experience.
   - More detailed instructions will be provided throughout the course.

4) **Exam #1 - Midterm Exam (20%)**. The midterm will cover all materials till the exam date. It is a closed book, in-class exam. Question formats may include True-False, Multiple Choice, and short open-ended questions.

5) **Exam #2 - Final Exam (20%)**. The final-exam will include all materials covered after the midterm. It is a closed book, in-class exam. Question formats may include True-False, Multiple Choice, and short open-ended questions.

6) **Group Project (40%)**. **Choose Option 1 or 2 for the group project** (Details in the Appendices).
   1. **Group reports (20%)**: There are three phases in the group project (5% each for Phase 1 & 2, and 10% for Phase 3 & Conclusion). Each group needs to submit each phase by the deadline as specified in the Course Schedule.
   2. **Group presentation (10%)**: 2 group presentations - one for Phase 1 & 2 and a final presentation.
   3. **Team Member Contributions (10%)**: Each member of the team is expected to contribute equally to each part of the project. Sometimes, despite our best efforts, some team members end up not pulling their fair share of the weight. To identify such problems early on and to ensure that each team member is given a project grade reflecting individual contributions, an individual **Team Member Contribution Form** is part of the deliverable **twice** throughout the course. Each of you must individually turn in the **confidential** Team Member Contribution Form to report the relative effort/contribution of each person (including yourself). For the final grade, I will take the average of the two.
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<tr>
<th>Dates &amp; Topics</th>
<th>Assignment/Readings</th>
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<tr>
<td><strong>WEEK 1 – What is Strategy?</strong></td>
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| Aug. 28 (Tue) Course Introduction & Overview | Required readings:  
• Syllabus  
• Rothaermel (2016), Chapter 1 |
| Aug. 30 (Thur) What is strategy? | Required readings:  
• Rothaermel (2016), Chapter 1  
Main issue/topics:  
• What is strategy and how is it different from operational effectiveness?  
• What is stakeholder management? How can effective stakeholder management benefit firm performance? |
| **WEEK 2 – Strategic Leadership** |
| Sep. 4 (Tue) Strategic Leadership | Requirements:  
• Read: Rothaermel (2016), Chapter 2 - Chapter Case: Marissa Mayer: Turnaround at Yahoo?  
• Listen: “The 10 Greatest CEOs” by Jim Collins ([http://www.jimcollins.com/media_topics/media.html#*whatissgreat](http://www.jimcollins.com/media_topics/media.html#*whatissgreat))  
• “The best leaders are humble leaders” (2014). Harvard Business Review.  
Recommended:  
Discussion questions:  
If you could choose one CEO among the 10 CEOs mentioned in Jim Collins talk to run your new start-up, who would you choose and why?  
Main issue/topics:  
1. Strategic leadership – different types of leadership (person-focused leadership, charismatic leadership, servant leadership, etc) and their impact on organizational outcome  
2. The strategic management process (top-down strategic planning, scenario planning, strategy as planned emergence) |
| Sep. 6 (Thur) Strategic Leadership | Required reading:  
• Rothaermel (2016), Chapter 2  
Recommended:  
Discussion questions:  
*Look up the vision or mission statement of the company/organization for your group project,*  
1. Evaluate the vision or mission statements. Is it more product-oriented or more customer-oriented? |
2. Can you envision what actions would be consistent with the vision or mission statement? Provide examples.

3. Is it clear how success would be measured? Provide concrete examples/ideas of how success can be measured.

**[Group project]:**
- Overview of data sources

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### WEEK 3 – External Analysis

**Sep. 11 (Tue)**  
**External analysis:** PESTEL

**Required reading:**
- Rothaermel (2016), Chapter 3  
  Recommended:
  - “The Uncertainty Advantage” – strategy+business (Feb. 22, 2017),  
    [https://www.strategy-business.com/article/The-Uncertainty-Advantage?gko=6b60b](https://www.strategy-business.com/article/The-Uncertainty-Advantage?gko=6b60b)

**Discussion questions:**
- For the industry for your group project,  
  - Among the PESTEL framework (refer to textbook pp. 64-72), discuss which factor is likely to be the most critical.

**Sep. 13 (Thur)**  
**External analysis:** Industry analysis

**Required reading:**
- Rothaermel (2016), Chapter 3  

**Discussion question:**
- For the industry for your group project, discuss its profit potential. For this analysis, use Porter’s Five Forces framework.  
  - (in-class exercise) Industry analysis (industry ratios, averages, etc) using Mergent online

**[Group project]:**
- The importance of proper citations in writing your group paper

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### WEEK 4 – Internal Analysis

**Sep. 18 (Tue)**  
**Internal analysis – The VRIO Framework**

**Required readings:**
- Rothaermel (2016), Chapter 4  
  - MiniCase 8: “Nike’s Core Competency: The Risky Business of Fairy Tales” (Rothaermel 2016 pp. 446-448)

**Discussion question:**
- The MiniCase indicates that Nike’s core competency is to create heroes. Does it obey the VRIO attributes?

**Sep. 20 (Thur)**  
**Internal analysis – Isolating Mechanisms: How to Sustain a Competitive Advantage**

**Group project**
- Phase 1 & Team member form #1 due!

**Required readings:**
- Rothaermel (2016), Chapter 4  
  Recommended:  
  - “How Disney milks its hits for profits every after”, WSJ (2015/6/9)  
  - “How Zara grew into the world’s largest fashion retailer”, NYT (2012/11/9)

**Discussion question:**
- Think of products/services/companies that failed to sustain its competitive advantage and the reasons why (refer to textbook pp. 118-122)  
  - What are various isolating mechanism to sustain competitive advantage?

**[Group project]:**
- Phase 1 (External Analysis) due! **Due before class:** by Sep. 19 (Wednesday), 11:59 PM (One submission per group)  
- Team member contribution form #1 due! **Due before class:** by Sep. 19 (Wednesday), 11:59 PM (Individual submission)
## Week 5 – Individual Project

### Sep. 25 (Tue)
**Increasing empathy**

**Required readings:**
- Read: “Microsoft CEO Satya Nadella: How Empathy Sparks Innovation”
  ([http://knowledge.wharton.upenn.edu/article/microsofts-ceo-on-how-empathy-sparks-innovation/](http://knowledge.wharton.upenn.edu/article/microsofts-ceo-on-how-empathy-sparks-innovation/))

**[Individual Project]:**
- Volunteer at a non-profit organization before Sep. 27, 2018
- On Sep. 27, 2018, you will give a short presentation (5 minutes) of where you volunteered and what you have learned through that experience
- More detailed instructions will be provided throughout the course.

### Sep. 27 (Thu)
**Increasing empathy**

**Requirements:**
- 5 minutes presentations of the places that you have volunteered

## Week 6 – Firm Performance & Business Strategy: Differentiation, Cost Leadership, and Blue Oceans

### Oct. 2 (Tue)
**Firm performance & Business strategy**

**Required readings:**
- Rothaermel (2016), Chapter 5 & 6
  - Chapter case: The Quest for Competitive Advantage: Apple vs. Microsoft

**Discussion question:**
- [Chapter case] looking at the different ways to assess competitive advantage discussed in this chapter, does Apple have a competitive advantage over Microsoft using any of the approaches? Why or why not?

### Oct. 4 (Thu)
**Business strategy & Review for Midterm**

**Required readings:**
- Rothaermel (2016), Chapter 6

**Discussion questions:**
- More recently, the Porsche brand is repositioning itself from focused differentiation to broad differentiation by changing its competitive scope.
  1. What are the risks inherent in such strategic positioning? What are the benefits?
  - Do you think Porsche will be successful in carving out a new strategic position as a broad differentiator? Why or why not?

**Review for Midterm**
- Review of the materials (cases, concepts, etc) covered in class so far

## Week 7 - Mid-semester break & Midterm exam

### Oct. 9 (Tue)
**No class. Mid-semester break**

### Oct. 11 (Thur)
**MIDTERM EXAM**
(Chapters 1-6 & all related materials covered so far)

## Week 8 – Business Strategy: Innovation and Entrepreneurship

### Oct. 16 (Tue)
**Innovation**

**Required readings:**
- Rothaermel (2016), Chapter 7

**Discussion questions:**
- Is Uber a disruptive innovation? Does it depend on which business you examine (taxi business vs. limousine business)?
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<tr>
<th>Date</th>
<th>Topic</th>
<th>Required reading</th>
<th>Discussion questions</th>
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| Oct. 18 (Thur) | Entrepreneurship             | **Required reading:**                                                             | 1. What are some of Wilson and Pitruzelli’s background/characteristics that put them in an advantage as successful entrepreneurs? What are some that put them at risk?  
2. What are some of the unique organizational culture of Wurstküche, and how do you think they have benefited or impeded its operations/expansions?  
3. Let’s think about the role of timing in the success of entrepreneurial success – How was timing an important factor in the opening and expansions of Wurstküche?  
4. What should Wilson and Pitruzzelli’s next steps be? |
| Oct. 23 (Tue) | Vertical Integration and Diversification | **Required readings:**                                                             | 1. Rothaermel (2016), Chapter 8  
3. MiniCase 19: “A” is for Alphabet and “G” is for Google: Alphabet’s Corporate strategy and Google’s strategy process |
| Oct. 25 (Thur) | Presentation #1               | **Group project:**                                                               | 1. During class, you will give a short presentation about your Group Project Phase 1 & 2 |
| Oct. 30 (Tue) | Strategic Alliances and Mergers and Acquisitions | **Required readings:**                                                             | 1. Rothaermel (2016), Chapter 9  
2. Find a recent news article about a strategic alliance or mergers & acquisitions. Explain the (expected) benefits of the identified strategic alliance or mergers & acquisitions based on the theories provided in the book chapter. |
| Nov. 1 (Thur) | Global strategy               | **Required readings:**                                                             | 1. Rothaermel (2016), Chapter 10  
3. [MiniCase] How would you prioritize which nations to expand distribution into if you were working for a major Hollywood movie studio? |
| Nov. 6 (Tue) | Issues in global strategy (1) | **Required readings:**                                                             | 1. “Strategies that fit emerging markets”, HBR (2005)  
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<th>Date</th>
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<th>Required readings</th>
<th>Discussion questions</th>
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<tr>
<td>Nov. 8 (Thur)</td>
<td>Issues in global strategy (2)</td>
<td><strong>Required readings:</strong>&lt;br&gt; Italian Tax Mores in Ethical Issues in Business: A Philosophical Approach. Donaldson and Werhane (8e). (pp. 54-56)&lt;br&gt; Donaldson “Values in Tension”, HBR (Sep. 1, 1996), <a href="http://lovola-primo.hosted.exlibrisgroup.com/01LUC:Library_Collections:TN_proquest227755543">http://lovola-primo.hosted.exlibrisgroup.com/01LUC:Library_Collections:TN_proquest227755543</a></td>
<td><strong>Discussion questions:</strong>&lt;br&gt; Did the American manager do anything wrong? Why or why not?&lt;br&gt; What would you have done in his place?</td>
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<td>Nov. 13 (Tue)</td>
<td>Organizational design</td>
<td><strong>Required readings:</strong>&lt;br&gt; Rothaermel (2016), Chapter 11&lt;br&gt; [Chapter Case] Zappos: From happiness to holacracy</td>
<td><strong>Discussion questions:</strong>&lt;br&gt; Why is it so difficult to make changes in an organization?&lt;br&gt; (ChapterCase) Why is Zappos experiencing significant implementation problems with holacracy? What else could Zappos do to help implementing the new structure more effectively?</td>
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<td>Nov. 15 (Thur)</td>
<td>Challenges to changing and developing new capabilities</td>
<td><strong>Required readings:</strong>&lt;br&gt; Case: “Texas Instruments: Death of a Computer” (on Sakai)</td>
<td><strong>Discussion questions:</strong>&lt;br&gt; 1. What are the underlying reasons why TI’s personal computer was unsuccessful?&lt;br&gt; 2. Why did TI follow the path that it did in marketing their computer?</td>
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<td>Nov. 20 (Tue)</td>
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<td><strong>Required readings:</strong>&lt;br&gt; Rothaermel (2016), Chapter 12&lt;br&gt; MiniCase 28: UBS: A Pattern of Ethics Scandals</td>
<td><strong>Discussion questions:</strong>&lt;br&gt; What is the role of the Board of Directors? Think in lines with the principle-agent problem (adverse selection, moral hazard, etc.).</td>
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<td>Nov. 22 (Thur)</td>
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<td><strong>Required readings:</strong>&lt;br&gt;</td>
<td><strong>Week 13 – Ethical issues in business</strong>&lt;br&gt; No Class. Thanks-giving break.</td>
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**Recommended:**

**Discussion questions:**
1. In what ways was reading this paper helpful? For example, did reading the paper give you a better understanding of social entrepreneurs & social enterprises? Explain.
2. How is the prosocial cost-benefit analysis different from the traditional/rational cost-benefit analysis?

### Week 15 – Review for Finals & Group Presentations

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<tr>
<td>Dec. 4 (Tue)</td>
<td>Review for finals</td>
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<td>- Review of the materials (cases, concepts, etc) covered in class since the midterm</td>
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<tr>
<td>Dec. 6 (Thur)</td>
<td><strong>Group project</strong></td>
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<td>- Phase 3 &amp; Conclusion due, Due before class: by Dec. 5 (Wed), 11:59 PM (One submission per group)</td>
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<td>- Team Member Contribution form #2, Due before class: by Dec. 5 (Wed), 11:59 PM (individual submission)</td>
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<td>- Final presentation! (in class on Thursday Dec. 6)</td>
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<td><strong>Course wrap-up</strong></td>
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### Finals Week (Apr. 30-May 5)

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<th>Date</th>
<th>Event</th>
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<tr>
<td>Final exam</td>
<td>Section 102: December 11 (Tuesday), 9-11am</td>
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<td></td>
<td>Section 104: December 15 (Saturday), 4:15-6:15pm</td>
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**Please note:** This class may occasionally deviate from the course outlined above. The instructor reserves the right to make changes as needed to the course syllabus.
Each group will choose one of the following companies to assess its potential or existing international expansion plan to the following countries:

*Apparel:*
1. Under Armour (USA) to Chile
   - “Under Armour (UAA) Up 47% YTD: What's Behind the Rally?”

*Food & Beverages:*
2. Peet’s Coffee (USA) to China
   - “China’s budding coffee culture propels Starbucks, attracts rivals” (https://www.reuters.com/article/us-starbucks-china/chinas-budding-coffee-culture-propels-starbucks-attracts-rivals-idUSKBN1DZ0TO)
3. Panera (USA) to (your decision)
   - “Starbucks food woes look worse with JAB’s Panera acquisition”

*Healthcare:*
4. CVS Health (USA) to (your decision)
   - “UPDATE 4-CVS buys Brazil's Onofre in first international deal”

*Retail:*
5. Aldi (Germany) to China
   - “German discounter Aldi to start online sales in China”
   - “German supermarket giant Aldi eyes China expansion”
   (http://www.chinadaily.com.cn/a/201803/09/WS5aa1f33da106e7dcc140a2c.html)

There are three phases to the group project with individual deadlines for each phase. Details of the three phases are as follows:

1) **Phase 1 – Industry analysis (5%). Due date: Sep. 19 (Mon), 11:59 pm**
   - Content requirements:
     1. Conduct an industry analysis (e.g., use Porter’s Five Forces)
   - Format requirements:
     1. Cover page with title, group names, and date
     2. Table of contents
     3. List of references
     4. Maximum 5 pages (Double-spaced, 12-point font) excluding the cover page, table of contents, and list of reference

2) **Phase 2 – Company analysis (5%). Due date: Oct. 22 (Mon), 11:59 pm**
   - Content requirements:
     1. General information about the company (e.g., brief history, financials, etc)
2. Purpose of the product/service
3. Targeted market(s)
4. (Optional) Include any of the following issues if they are of particular importance to the firm – Corporate governance (e.g., composition of the board of directors, etc); price and promotion; production and logistics; human resources

- **Format requirements:**
  1. Cover page with title, group names, and date
  2. Table of contents
  3. List of references
  4. **Maximum 5 pages** (Double-spaced, 12-point font) excluding the cover page, table of contents, and list of reference

3) **Phase 3 – Expansion strategy (10%). Due date: Dec. 5 (Wed), 11:59 pm**

- **Content requirements:**
  1. **Global strategy** – *What is your strategy to enter the market?*
     1) *(industry analysis of the host country #1)* Describe business strengths, weaknesses, opportunities, and threats (SWOT) of going into the new country
        - In analyzing the strengths and weakness of the company, use your analysis from Phase 2
        - In analyzing opportunities and strengths, use the PESTEL analysis to conduct an external analysis of the host country (i.e., the country that the company is expanding to). Consider the question, *Why is this host country a potential market for your product/service?* For the external analysis consider,
          - Political factors (e.g., political system, structure, political parties, political risk)
          - Economic factors (e.g., economic system, currency risk, trade environment)
          - Sociocultural factors (e.g., demographics, cultures, norms, and values)
          - Technological factors
          - Ecological factors
          - Legal factors (e.g., legal system, legal issues in international business, legal risk)
     2) *(industry analysis of the host country #2)* Identify domestic and international companies involved in similar business activities
  3) Justify the mode of entry
  2. **Conclusion** – *Is your product/service viable in the targeted market?*
     1) Viability analysis – is the international expansion to the targeted market possible?
     2) Recommendations to the company

- **Format requirements:**
  1. Cover page with title, group names, and date
  2. Table of contents
  3. List of references
  4. **Maximum 15 pages** (Double-spaced, 12-point font) excluding the cover page, table of contents, and list of reference

2) In addition to what you have learned throughout the course, you should use various resources to complete your assignment, including the company’s website, company’s 10K forms, newspaper articles (Economist, Financial Times, New York Times, etc.), etc.
The goal of this project is to help you to apply your knowledge and skills to a current situation facing a real-life organization. In addition, by applying the strategic frameworks and tools that we have typically examined in terms of for-profit organizations, you will be able to broaden your analytical skills by applying them to non-profit organizations (e.g., What worked and what did not? What kind of adaptations did you have to make to the frameworks & tools in analyzing the nonprofit organization? What issues become more salient for nonprofit organizations?). Your team will research the organization’s current situation, identify key strategic issue/s facing the organization, and then present its strategic recommendations for the organization.

Similarly to Option 1, there are three phases with individual deadlines for each phase. Details of the three phases are as follows (*Specific organizations will be announced):

1) Phase 1 – External analysis (5%). Due date: Sep. 19 (Mon), 11:59 pm
   - Content requirements:
     1. Conduct an external analysis of the organization (apply the PESTEL and Porter’s Five Forces frameworks). Questions to consider,
       - What is the current state of the issue? For example, you can get some understanding of the current state by looking at relevant statistics (e.g., statistics of homelessness in the U.S., https://endhomelessness.org/homelessness-in-america/homelessness-statistics/state-of-homelessness-report/)
       - What are the donor and beneficiary trends in the field?
       - Who are some of the main/closest organizations with similar purposes?
   - Format requirements:
     1. Cover page with title, group names, and date
     2. Table of contents
     3. List of references
     4. Maximum 5 pages (Double-spaced, 12-point font) excluding the cover page, table of contents, and list of reference

2) Phase 2 – Organization analysis (5%). Due date: Oct. 22 (Mon), 11:59 pm
   - Content requirements:
     1. General information about the organization. Some questions/issue to consider,
       - Brief history of the organization
       - What is the organization’s mission and goal? What is their intended impact (e.g., who are their targeted beneficiaries)? What is the purpose of their products/services?
       - What is the organization’s strengths and weakness relative to others’ in the field?
       - How does the organization fit into the broader ecosystem?
     2. (Optional) Include any of the following issues if they are of particular importance to the organization – Corporate governance (e.g., composition of the board of directors, etc); price and promotion; production and logistics; human resources
     3. What are some issues/challenges that you have identified during your volunteering activity?*
   - Format requirements:
3) Phase 3 – Strategic Planning (10%). Due date: Dec. 5 (Wed), 11:59 pm

- Content requirements:
  1. (from Phase 2) What is the strategic issue/challenge that you have identified for the organization (through your analysis and/or volunteering experience)?
  2. After you have identified the strategic issue(s), analyze*,
     - Strategic priorities: what specific actions and activities need to take place to achieve the intended goal?
     - Resource implications: what kind of implication will the proposed actions/activities have on the organization’s resources (financial, human, organization)?
     - Performance measure: how would you measure the impact?
       - What is the unit of analysis in measuring the impact? Individual-based, organization-based, both, others?
       - What are quantitative or qualitative measures you can use?

3. Conclusion & Final recommendation to the organization

- Format requirements:
  1. Cover page with title, group names, and date
  2. Table of contents
  3. List of references
  4. Maximum 15 pages (Double-spaced, 12-point font) excluding the cover page, table of contents, and list of reference
Quinlan School of Business Policies

**Attendance and Class Etiquette:**
Students are expected to attend all classes, on time and for the duration of each class. If a student must miss class, notify me by email prior to the class to be missed to validate an excused absence.
As a courtesy to the instructor and to the class members, cell phones must be placed in mute or vibrate mode during the class. Critically important calls should be taken outside of the classroom. Please inform me upfront of the class start of known critically important phone calls that you will be stepping out to take.

**Quinlan School of Business Policy on Make-Up Examinations:**
Loyola University academic policy provides the tests or examinations may be given during the semester or summer sessions as often as deemed advisable by the instructor. Because Quinlan faculty believes examinations represent a critical component of student learning, required examinations should be taken during the regularly scheduled class period. Make-up examinations are discouraged. Exceptions may be granted only the faculty member or department chair, and only for unavoidable circumstances (illness verified by a signed physician’s note, participation in intercollegiate athletic events, subpoenas, jury duty, military service, bereavement, or religious observances). A make-up examination may be scheduled only with the permission of the appropriate Quinlan Assistant or Associate Dean.
If a make-up examination must be given, it is the responsibility of the faculty member to prepare, schedule, and proctor the exam. The only regular exception is for the student – athlete, who may use the testing services of the Athletic Department to complete a make-up examination. Students with documented special testing needs will be accommodated.

**Academic Integrity:**
All members of the Quinlan School shall refrain from academic dishonesty and misconduct in all forms, including plagiarism, cheating, misrepresentation, fabrication, and falsehood…Plagiarism or cheating on the part of the student in individual or group academic work or in examination behavior will result minimally in the instructor assigning the grade of “F” for the assignment or examination. In addition, all instances of academic dishonesty must be reported to the chairperson of the department involved.

**Disability support**
Any student who feels s/he may need an accommodation based on a disability should contact me privately to discuss specific needs. You must contact Services for Students with Disabilities (SSWD) to establish eligibility. For additional information, please refer to, [http://www.luc.edu/sswd/index.shtml](http://www.luc.edu/sswd/index.shtml)