



**Continuous Improvement Review Report**  
**AACSB International**  
**School of Management**  
**University of San Francisco**  
**January 5, 2016**

**APPENDICES**

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## **APPENDIX 1**

### **University of San Francisco Vision, Mission, and Values Statement and Basic Information**

**University of San Francisco**  
**Vision, Mission, and Values Statement**

**Vision**

The University of San Francisco will be internationally recognized as a premier Jesuit Catholic, urban University with a global perspective that educates leaders who will fashion a more humane and just world.

**Mission**

The core mission of the University is to promote learning in the Jesuit Catholic tradition. The University offers undergraduate, graduate and professional students the knowledge and skills needed to succeed as persons and professionals, and the values and sensitivity necessary to be men and women for others.

The University will distinguish itself as a diverse, socially responsible learning community of high quality scholarship and academic rigor sustained by a faith that does justice. The University will draw from the cultural, intellectual and economic resources of the San Francisco Bay Area and its location on the Pacific Rim to enrich and strengthen its educational programs.

**Core Values**

The University's core values include a belief in and a commitment to:

1. the Jesuit Catholic tradition that views faith and reason as complementary resources in the search for truth and authentic human development, and that welcomes persons of all faiths or no religious beliefs as fully contributing partners to the University;
2. the freedom and the responsibility to pursue truth and follow evidence to its conclusion;
3. learning as a humanizing, social activity rather than a competitive exercise;
4. a common good that transcends the interests of particular individuals or groups; and reasoned discourse rather than coercion as the norm for decision making;
5. diversity of perspectives, experiences and traditions as essential components of a quality education in our global context;
6. excellence as the standard for teaching, scholarship, creative expression and service to the University community;
7. social responsibility in fulfilling the University's mission to create, communicate and apply knowledge to a world shared by all people and held in trust for future generations;
8. the moral dimension of every significant human choice: taking seriously how and who we choose to be in the world;
9. the full, integral development of each person and all persons, with the belief that no individual or group may rightfully prosper at the expense of others;
10. a culture of service that respects and promotes the dignity of every person.

**Strategic Initiatives**

The following initiatives are key to the University's achieving recognition as a premier Jesuit Catholic urban University:

1. Recruit and retain a diverse faculty of outstanding teachers and scholars and a diverse, highly qualified, service-oriented staff committed to advancing the University's mission and core values.
2. Enroll, support and graduate a diverse student body; which demonstrates high academic achievement, strong leadership capability, concern for others and a sense of responsibility for the weak and the vulnerable.
3. Provide an attractive campus environment and the resources necessary to promote learning throughout the University:
  - Technology solutions to enhance learning and improve service
  - Facilities to support outstanding educational programs
  - Learning resources that improve curriculum and support scholarship
4. Continue to strengthen the University's financial base to support its educational mission.

### **Basic Information**

#### **A Brief History**

The University of San Francisco began in 1855 as a one-room schoolhouse named St. Ignatius Academy. Its founding is interwoven with the establishment of the Jesuit Order in California, European immigration to the western United States, and the population growth of California and San Francisco as a result of the California Gold Rush.

On October 15, 1855, the school opened its doors to its first class. Three students showed up, a number that gradually grew to 65 by 1858. In 1859, Anthony Maraschi, S.J., the founding president of St. Ignatius Academy, incorporated the institution under California state law, obtained a charter to issue college degrees, formed a board of trustees, and renamed the institution St. Ignatius College. Student enrollment, composed largely of first- and second-generation Irish and Italian immigrants, increased to 457 by 1862. Further growth in the number of students and rising property taxes prompted St. Ignatius Church and College to move in 1880 to the corner of Hayes Street and Van Ness Avenue, the current site of the Louise M. Davies Symphony Hall. The college opened its doors to 650 students and rave reviews in the local press. The institution occupied a full city block and was described as having "scientific laboratories and departments" as "thoroughly equipped as money can make them" and a library that contained "the cream of knowledge on all necessary subjects." The attached church was described as "magnificent" and could hold up to 4,000 people. In 1903, the college added a "splendid new gymnasium," described as the best in the city. The history of St. Ignatius Church and College at this location came to an abrupt end on April 18, 1906. On the morning of that day, an earthquake, followed by several days of fire, brought the church and college, and most of San Francisco, to almost complete ruin. The city and the institution, however, quickly rebuilt from the devastation. In September 1906, St. Ignatius Church and School reopened in temporary quarters, known as the "shirt factory," on the southwest corner of Hayes and Shrader streets, currently the site of one of the buildings of St Mary's Medical Center. In 1927, St. Ignatius College moved into its new Liberal Arts Building, the present Kalmanovitz Hall, near the corner of Fulton and Parker Streets. In 1930, at the request of several alumni groups, St. Ignatius College changed its name to the University of San Francisco.

For 160 years, the University of San Francisco has served the citizens of San Francisco and enriched the lives of thousands of people. The institution has graduated students who went on to become leaders in government, education, business, journalism, sports, the sciences, nursing and health care, and the legal and medical professions. Among its alumni, the university counts three San Francisco mayors, a United States Senator, four California Supreme Court Justices, a California Lieutenant Governor, two Pulitzer Prize winners, three Olympic medalists, several professional athletes, and the former president of Peru.

Today the University of San Francisco enrolls more than 10,700 students in its five schools and colleges: The School of Law, founded in 1912; the College of Arts and Sciences, organized in 1925; the School of Management, which began in 1925 as the College of Commerce and Finance and was merged with the College of Professional Studies in 2009; the School of Education, which started as the Department of Education in 1947 and was upgraded to a school in 1972; and the School of Nursing and Health Professions, which began as the Department of Nursing in 1948 and became a school in 1954. USF is one of the most ethnically diverse universities in the nation. Among the entire fall 2014 student population, 47 percent were Asian, African-American, Latino, Native Hawaiian/Pacific Islander, or Native American, and 16 percent were international. In 1964, USF became completely coeducational, though women had been enrolled in the evening programs in law and business since 1927, in education since 1947, and in nursing since 1948. In the fall of 2014, 63 percent of the overall student population was female.

Central to the mission of the University of San Francisco is the preparation of men and women to shape a multicultural world with generosity, compassion, and justice. The institution's Vision, Mission, and Values Statement, approved by the Board of Trustees on September 11, 2001, after a year of formulation and campus-wide participation, captures the essence of this commitment in its opening paragraph: "The University of San Francisco will be internationally recognized as a premier Jesuit Catholic, urban University with a global perspective that educates leaders who will fashion a more humane and just world." This mission permeates all aspects of the institution, including student learning and faculty development, curriculum design, program and degree offerings, alumni relations, publications, and a host of other institutional features. In 2005, the University of San Francisco celebrated the 150th anniversary of its founding. The main USF campus currently occupies 55 acres near Golden Gate Park in San Francisco. In addition, the university offers classes at four Northern California branch campuses (Sacramento, San Jose, Santa Rosa and Pleasanton), at a Southern California branch campus, and at locations in downtown San Francisco, including the Folger Building at 101 Howard Street and at the Presidio. The schools and colleges comprising the institution also offer students a multitude of international experiences and study-abroad programs that enrich the learning community and fulfill the university's mission. The institution has grown dramatically since its modest beginning. It continues, however, to fulfill a mission that stretches back in time to the founding of the Society of Jesus in 1540 by St. Ignatius of Loyola, that took root in San Francisco in 1855, and that flourishes today in a premier Jesuit Catholic University.

## Basic Facts

### Full Name of Institution:

University of San Francisco

### Address:

2130 Fulton Street, San Francisco, CA 94117-1080

### Web Site Address:

[www.usfca.edu](http://www.usfca.edu)

### General Information Phone Number:

415-422-5555

### President:

Paul J. Fitzgerald, S.J.

### Interim Provost:

James L. Wiser

### Sponsorship and Control:

USF is an independent, private, non-profit institution of higher education governed by a 42-member Board of Trustees. It is one of the 28 Jesuit Catholic colleges and universities in the United States.

### Founding and Charter:

USF was founded in 1855 and was granted a charter by the State of California to issue college degrees in 1859.

### Accreditation:

The University of San Francisco is accredited by the Western Association of Schools and Colleges (WASC), an accreditation first granted in 1950 by the Western College Association (WCA), the antecedent of WASC. In 2010, WASC reaffirmed USF's accreditation for 9 years. WASC is now known as WSCUC.

USF is also accredited by several professional accrediting bodies, including, but not limited to, the American Bar Association (ABA), the California Commission on Teacher Credentialing, AACSB International–The Association to Advance Collegiate Schools of Business, the Commission on Collegiate Nursing Education (CCNE), the National Association of Schools of Public Affairs and Administration (NASPAA), and the Council on Education for Public Health (CEPH).

### Classification by the Carnegie Foundation for the Advancement of Teaching:

USF is classified as a Doctoral/Research and Community Engaged University.

Under the Carnegie Foundation classification system, USF is characterized as balancing arts, sciences, and the professions at the undergraduate level; as doctoral/professional dominant at the graduate level; with the majority of its students being undergraduates; as selective, with a high level of transfer-in students; and as a medium-sized, four-year, and primarily residential institution. In 2006, USF received the community engagement classification in both possible categories, curriculum engagement and outreach and partnership. This classification was renewed in 2015 for 10 years.

### Select Firsts, Honors, and Achievements in 2014-15

- USF was listed as a Tier One National University in the 2015 *U.S. News & World Report*, was 8th in undergraduate student ethnic diversity, and was tied for 7th in the percentage of international students, among 280 national universities.
- For the eighth straight year, USF was named to the President's Higher Education Community Service Honor Roll by the Corporation for National and Community Service. This honor highlights USF students' exemplary service on issues ranging from poverty and homelessness, to environmental justice. Honorees are chosen on the basis of the scope and impact of service projects, percentage of students participating in service activities, and the extent to which the school offers academic service-learning courses.
- USF was listed as a College of Distinction in 2014 for its excellent teaching, innovative learning experiences, opportunities for personal development, and high value by graduate school, and employers.
- Graduateprograms.com ranked USF's MBA program as 45th among its top 50 Graduate Programs in the spring of 2015, based on rating and reviews from current or recent graduate students, posted by more than 70,000 students participating in over 1,600 graduate programs nationwide.
- *The Washington Monthly* ranked USF as 18th out of 257 national universities on a combined measure of the number of staff and students supporting community service, and 20th overall for its contribution to the public good for academic research, community service, and support for lower-income students.
- *The Princeton Review* named USF one of the "Best Western Colleges" and San Francisco 16th in the nation for "Great College Towns."
- *Forbes Magazine* ranked USF 21st on its 2014 list of the nation's most entrepreneurial universities by calculating each school's entrepreneurial ratio: the number of students and alumni who started their own company relative to the school's total student body.
- USF Chancellor and former President Stephen A. Privett, S.J., was named Most Admired CEO of the Year in 2014 by the *San Francisco Business Times*, in the large nonprofit category for his commitment to innovation and dedication to the local community.
- Former Provost and current Professor of Sociology Jennifer Turpin was named by the *San Francisco Business Times* to the list of the most influential women in the Bay Area for the fourth straight year in 2014. The list recognizes 150 outstanding women professionals who make a difference in their companies, industries, and communities.
- Elizabeth Davis, Dean of the School of Management, was named by the *San Francisco Times* to its 2015 list of the most influential women in the Bay Area.
- Mary Wardell-Ghirarduzzi, Vice Provost for Diversity Engagement and Community Outreach, was named a San Francisco Human Rights Commission Hero Award winner in 2014, and was appointed to the city's Library Commission.
- Law School Dean John Trasviña won the City of San Francisco's 2014 Latino Heritage Education Award, which recognizes Latino leaders in art, business, and education.
- In 2014, the National Law Journal ranked USF's School of Law 99th among 168 law schools for placing graduating students as associates at the nation's 250 largest law firms.
- The USF School of Law was ranked in the top tier of law schools by *U.S. News and World*



*Report* in 2016. It is in a tie for 138th due to gains in graduates' California bar passage and employment rates.

- Payscale ranked USF among the top 10 schools in terms of salary potential for students who earn a degree in social sciences in its 2014-2015 Payscale Potential Salary Reports
- Graduateprograms.com ranked USF's online graduate programs in nursing as 18th in the nation and its public health graduate program as 14th in the nation, based on reviews by current students or recent graduates of USF's School of Nursing and Health Professions. Students at 1,500 schools nationwide were surveyed regarding their quality of education, faculty accessibility, and career support.
- The California Commission on Teacher Credentialing unanimously recommended the re-accreditation of USF's School of Education credential programs for the maximum period of seven years.
- USF School of Law students scored a national victory in ABA Tax Moot court competition, and won the regional moot court competition for the International Trademarks Association in January 2015. The USF Kinesiology Department was ranked 3rd in the nation in 2014 by College Factual, based on overall academic quality.
- In 2014, the Doctor of Nursing Practice (DNP) program was ranked first among non-HBCUs (Historically Black Colleges and Universities) for having an excellent program in place for minority students.
- USF's one-year, intensive Master of Science Analytics program made the "23 Great" list by MastersInDataScience.org, a firm specializing in online guides of schools and educational programs, for its connections to Silicon Valley internships and career opportunities. The program was praised for its emphasis on the technical and business sides of the field, with courses in predictive analytics, econometrics, business communications, and management science.
- The Online Masters in Collegiate Athletics was ranked the third best online master sport management program in the nation in 2015 by Bestschools.com.
- USF became the first university in the nation to implement a new online system for reporting college sexual assaults, an approach to encourage students who are hesitant to come forward in person.

### **USF Student Profile**

As of September 5, 2014 (Census Date), the University of San Francisco enrolled 10,701 students, including 6,745 undergraduate students, 3,247 graduate students, 557 law students, and 152 special/non-degree students.

USF's coed student body (37 percent male and 63 percent female) represents diverse ethnic, religious, social, and economic backgrounds, 87 foreign countries, and 49 states.

### **USF Student Awards and Honors**

- Three USF students were awarded Fulbright English Teaching Assistantships (ETA) to teach abroad for the academic year 2014-2015: Bobbi Arduini (MA International and Multicultural Education) will travel to Bulgaria, Keyaira Lock (Sociology major) to South Africa, and Keala Pacheco (Psychology major) to Malaysia.

- The International Society for Technology in Education (ISTE) named USF doctoral student and high school English teacher Diana Neebe '17 its outstanding young educator of the year in 2015, for her innovative classroom use of iPads and other technology.
- Three USF students received a Gillman award (for Pell recipients who wish to study abroad and who will conduct a project of significance to “change the world”). The highly competitive program awarded three scholarships to the University of San Francisco students for Spring 2014: Clifford Alonzo - Sophia University (Tokyo, Japan), Kevin Buena - Victoria University (Wellington, New Zealand), and Nicolas Large - SIT (Ho Chi Minh City, Vietnam)
- Lydia P. Stanford (Nursing and Health Professions major), was awarded a Gilman Scholarship Summer Award for \$5,000 to study in Zambia in summer 2014.
- Two School of Management students (Mona Ahmadi, part-time MBA, and Alissa Oropeza, business undergraduate) were awarded scholarships in 2014 by the Financial Women of San Francisco Association for their extraordinary talent and great desire to pursue careers in finance and financial services.
- Victoria Isabel Duran and Annie Adamian, both IME EdD students, received a 2014 Teacher for Social Justice Award from Bay Area non-profit Teachers 4 Social Justice (T4SJ). The award recognizes educators that are dedicated to generating social justice in their classroom or community. Recipients are nominated for their work with students, parents of students, or colleagues.
- Justin Grider, an IDEC master’s student, and a resident minister at USF, won the 2014 International New Economic Talent competition in Prague with an econometric paper that used a propensity-score matching econometric technique to study the economic and social impacts of wheelchairs among the disabled in Ethiopia.

## Student Enrollment

### Student enrollment by college, as of census date (September 5, 2014):

College of Arts and Sciences:	4,471
(3,641 undergraduate students, 830 graduate students)	
School of Management:	2,984
(2,306 undergraduate students, 678 graduate students)	
School of Nursing and Health Professions:	1,479
(798 undergraduate students, 681 graduate students)	
School of Education:	1,058
(all graduate students)	
School of Law:	557
Special Students:	152
(100 undergraduate students, 52 graduate students)	

### Annual Student Costs (2015-2016)

Traditional Undergraduate:	
Tuition:	\$42,180/year
Room and Board (average):	\$14,104/year

Management Degree Completion:	
Undergraduate tuition, per unit:	\$1,020

Graduate:	
Arts and Sciences, per unit:	\$1,245
Business (MBA), per unit:	\$1,330
Education, on-campus masters, per unit:	\$1,110
Education, doctoral, per unit:	\$1,245
Nursing, on-campus masters per unit:	\$1,245
Nursing, on-campus doctoral per unit:	\$1,245

School of Law:	
Full-Time Tuition:	\$46,780/year
Part-Time (evening) Tuition:	\$1,670/unit

### Financial Aid

During the 2013-2014 academic year, 66% of all undergraduates were awarded financial aid and 26% were awarded Pell Grants. Average amount of all aid awarded was \$28,620. 27% of full-time, first-time freshman students were awarded Pell Grants, 67% were awarded institutional grants averaging \$21,123, and 71% were awarded some type of financial aid.

### Freshman Facts

The University of San Francisco enrolled 1,690 first-time freshmen in the fall semester of 2014. Salient facts about the freshman class include:

The class entered with an average GPA of 3.58.

The class had an average combined SAT score of 1144.

The first-time freshman class had 1,063 females (62.9%) and 627 males (37.1%)

### In the fall of 2014, the freshman student population, by ethnicity was:

Asian:	416 (24.6%)
African American:	77 (4.6%)
Latino:	337 (19.9%)
Native American:	23 (1.4%)
Native Hawai'ian/Pacific Islander:	14 (0.8%)
International:	345 (20.4%)
White:	458 (27.1%)
Other/Prefer not to Disclose:	20 (1.2%)
<b>Total:</b>	<b>1,690</b>

### Community Service and Service Learning

For the academic year ending in May 2014, 2,167 undergraduate students participated in service learning courses, representing 32.1% of the undergraduate enrollment.

USF has more than 50 student organizations, and four living-learning communities dedicated to community service.

During the 2013-2014 academic year, USF students engaged in nearly 600,000 hours of community service work.

### Student Ethnicity and Religious Affiliations

#### In fall 2014, the total student population, by ethnicity was:

	2,252
Asian:	(21.0%)
African American:	599 (5.6%)
	1,923
Latino:	(18.0%)
Native American:	141 (1.3%)
Native Hawai'ian/Pacific	
Islander:	89 (0.8%)
	1,750
International:	(16.4%)
Unspecified:	453 (4.2%)
	3,494
White:	(32.7%)
<b>Total:</b>	<b>10,701</b>

#### In fall 2014, the traditional undergraduate student population, by ethnicity was:

	1,560
Asian:	(24.0%)
African American:	265 (4.1%)
	1,253
Latino:	(19.2%)
Native American:	108 (1.7%)
Native Hawai'ian/Pacific	
Islander:	49 (0.8%)
	1,277
International:	(19.6%)
Unspecified:	113 (1.7%)
	1,887
White:	(29.0%)
<b>Total:</b>	<b>6,512</b>

#### In fall 2014, among traditional undergraduate students, the religious affiliations were:

Buddhist:	2.0%
Catholic:	28.1%
Hindu:	0.8%
Jewish:	1.6%
Muslim:	1.5%
No religion:	15.5%
Other:	7.6%
Protestant:	5.6%
Unspecified:	37.1%

### Retention Rates and Graduation Data

For the freshman class beginning in the fall of 2013, the freshman-to-sophomore retention rate was 87.2%.

The six-year graduation rate for full-time first-time freshmen entering in fall 2008 was 69.7%, and the four-year graduation rate for the same group was 60.6%.

## Degrees Awarded

**During 2013-2014, USF awarded 3,143 degrees, including:**

bachelor's degrees	1,507
master's degrees	1,306
doctoral degrees (including law)	330

## Student Evaluations

**On the May 2014 USF graduating student survey,**

- 96.5% of the undergraduate students reported that the university prepared them “very well” or “well” with the “knowledge and skills to work effectively with people from different cultures or from different cultural backgrounds.”
- 92.3% of the undergraduate students reported that USF contributed “very much” or “much” to their “commitment to scholarly excellence.”
- 96.5% of the undergraduate students reported that “overall, I was strongly satisfied or satisfied with my USF education.”

**On the Spring 2014 National Survey of Student Engagement,**

- 87% of the seniors reported that their experience at USF contributed “quite a bit” or “very much” to “thinking critically and analytically.”
- 76% of the seniors reported that their experience at USF contributed “quite a bit” or “very much” to “working effectively with others.”
- 90% of the seniors evaluated their “entire educational experience” at USF as “good” or “excellent.”

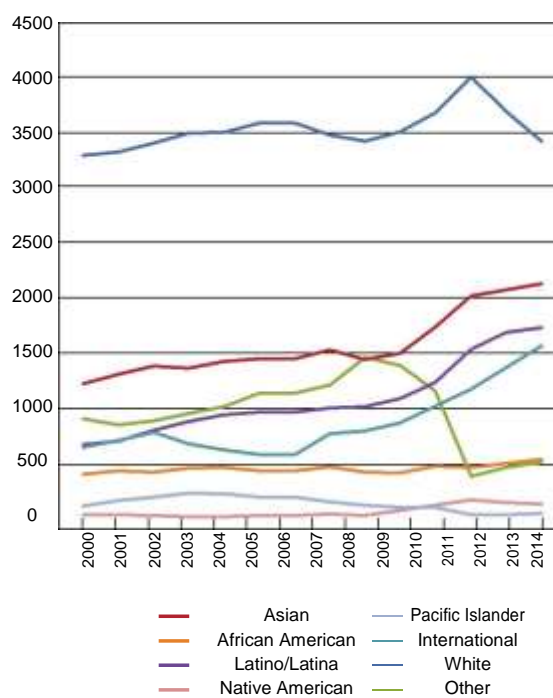
## Career and Educational Plans

- In 2013, 24.6% of USF’s graduating seniors reported that they planned to attend graduate school after graduation.
- In 2013, 19.8% of USF’s graduating seniors reported that they planned to start a new job or continue a current job.
- From 2001 to 2014, 65.7% of USF students who went through the USF Pre-Professional Health Committee were successful in gaining admittance to medical school, whereas nationally the acceptance rate during this period was 44.7%.

## Change in USF Student Enrollment by Ethnicity, 2000-2014

Category	Enrollment in 2000	Enrollment in 2014	Percentage Change
Asian	1,232	2,252	82.8%
African American	418	599	43.3%
Latino/Latina	684	1,923	181.1%
Native American	49	141	187.8%
Pacific Islander	128	89	-30.5%
International	657	1,750	166.4%
White	3,284	3,494	6.4%
Other	914	453	-50.4%
<b>Total</b>	<b>7,366</b>	<b>10,701</b>	<b>45.3%</b>

## Headcount Enrollment by Ethnicity 2000-2014



## USF Alumni Profile

USF has 105,900 alumni living in all 50 states, 6 United States territories, and 129 countries.

Among USF's living alumni, there are 3,524 teachers, 1,549 educational administrators, 604 engineers, 3,328 attorneys, 427 college professors, 718 elected and non-elected government officials, 620 accountants, 1,701 health care providers, 2,236 nurses, 409 physicians, 169 dentists, 271 social workers, 891 computer scientists, and 165 scientists.

338 USF alumni have joined the Peace Corps since that agency was established in 1961, placing USF in the top twenty five among institutions of comparable size regarding the average annual placement number of Peace Corps volunteers.

From 1912 (the year the USF School of Law was founded) to 2014, 274 law school alumni became judges.

Among USF's alumni, 51 percent live in the Bay Area, 24 percent live in California outside the Bay Area, 20 percent live in the United States outside of California, and 5 percent live outside the United States

### Notable USF Alumni Include:

- A current California Supreme Court Justice (Ming Chin), and three former California Supreme Court Justices (Matthew Sullivan, Jeremiah Sullivan, and Raymond Sullivan)
- A former California Lieutenant Governor (Leo T. McCarthy) A former United States Senator (James Phelan)
- Three former members of the United States House of Representatives (Lynn Woolsey, John Burton, and John Shelley)
- Three former San Francisco Mayors (James Phelan, John Shelley, and Frank Jordan)
- Two Pulitzer Prize winners (Joseph Rosenthal, Foster Church)
- The former Undersecretary for the Smithsonian Institute (Sheila Burke)
- The former Undersecretary of the Department of Education (Martha Kanter)
- The former President of Peru (Alejandro Toledo) The current San Francisco Police Chief (Greg Suhr)
- The former San Francisco Police Chief (Heather Fong), the first woman and second Asian to hold that position
- The Director of Public Health for San Francisco (Barbara Garcia)
- President of the San Francisco Board of Supervisors (London Breed) The current California Senate Majority leader (Bill Monning)
- The first Asian admitted to the practice of law in California history (Chan Chung Wing)
- The former Press Secretary for President John F. Kennedy (Pierre Salinger)
- The former chairman of Price Waterhouse World Firm (Dominic Tarantino)
- The award-winning historian and former California State Librarian (Kevin Starr)
- The former Commissioner of the National Football League (Pete Rozelle)
- The head coach for an Olympic Gold Medal team (Jimmy Needles) and Three Olympic Medal winners (Ollie Matson, Bill Russell, and K.C. Jones)
- Three members of the Pro Football Hall of Fame (Ollie Matson, Gino Marchetti, Bob St. Clair)
- Numerous star players in the National Basketball Association (Bill Russell, K.C. Jones, Mike Farmer, Bill Cartwright, Phil Smith)
- A Member of the Order of the British Empire for his work helping South African street children (Tom Hewitt)
- Two recipients of MacArthur Fellowship "Genius" Grants: The National Forensics Coach of the Year (Tommie Lindsey), the
- Founder of the Street Soldiers National Consortium (Joseph Marshall, Jr.)
- The recipient of the PGA's lifetime achievement award in journalism (Jaime Diaz)
- Philanthropist, composer, civic leader (Gordon Getty)
- The Bishop of the Catholic Diocese of Salt Lake City (John C. Wester)
- Auxiliary Bishop of the Archdiocese of San Francisco (Fr. William Justice)
- San Francisco Human Rights Commissioners (Sheryl Davis and Susan Christian)
- Co-founder of the Point Foundation (Carl Strickland)
- The current city administrator for the city and country of San Francisco (Naomi Kelly)
- California Teacher of the Year for 2010 (Valerie Ziegler) and for 2011 (Kadmir Rajagopal)
- California Assistant Principal of the Year for 2013 (Cynthia Rapaido) Co-founder of Starbucks Coffee (Gordon Bowker)

## Academic Programs by School or College

### College of Arts and Sciences

Dean: Marcelo Camperi

#### Undergraduate Majors

Advertising  
Architecture and Community Design/Honors Concentration Art History/Arts Management  
Asian Studies Biology Chemistry  
Communication Studies Comparative Literature and Culture Computer Science  
Critical Diversity Studies Data Science  
Design Economics  
Education, Dual Degree in Teaching English with Literature Emphasis English with Writing Emphasis  
Environmental Science Environmental Studies  
Fine Arts French Studies History

International Studies Japanese Studies Kinesiology  
Latin American Studies Mathematics  
Media Studies  
Performing Arts and Social Justice Philosophy  
Physics and Astronomy  
Politics  
Psychology  
Rhetoric and Language  
Sociology  
Spanish Studies  
Theology and Religious Studies

#### **Undergraduate Minors**

Advertising  
Astronomy  
Astrophysics  
Biochemistry  
Biology  
Chemistry  
Chemical Physics  
Chinese Studies  
Communication Studies  
Comparative Literature and Culture  
Computer Science  
Dance  
Design  
Economics  
English Minor in Literature  
English Minor in Writing  
Environmental Science  
Environmental Studies  
Film Studies  
French Studies  
German Studies  
History  
Japanese Studies  
Journalism  
Latin American Studies  
Literature  
Mathematics  
Media Studies  
Music  
Natural Science  
Philosophy  
Physics  
Politics  
Psychology  
Public Relations  
Science, Technology, Engineering, and Math Education (STEM)  
Sociology  
Spanish Studies  
Theater  
Theology and Religious Studies  
Writing

#### **Interdisciplinary Undergraduate Minors**

African Studies  
African American Studies  
Asian Pacific American Studies  
Asian Studies  
Catholic Studies and Social Thought  
Chicana-Latina Studies  
Child and Youth Studies  
Classical Studies  
Criminal Justice Studies



Cultural Anthropology  
Ethnic Studies  
European Studies  
Gender and Sexualities Studies  
Gerontology  
Health Studies  
Jewish Studies and Social Justice  
Latin American Studies  
Legal Studies  
Middle Eastern Studies  
Neuroscience  
Peace and Justice Studies  
Philippine Studies  
Public Service and Community Engagement  
Urban Agriculture

#### **Masters Programs**

Analytics  
Asia Pacific Studies  
Biology  
Biotechnology  
Chemistry  
Collegiate Athletics (online)  
Computer Science  
Economics  
Environmental Management  
International and Development Economics  
International Studies  
Museum Studies  
Public Affairs and Practical Politics  
Sport Management  
Urban Affairs  
Writing, MFA

#### **Certificate Programs**

Asia Pacific Graduate Studies  
Be Your Own Economist  
Basic Wetland Delineation  
Advanced Wetland Delineations

#### **Special Programs**

Arrupe Justice Immersions  
Casa Bayanihan  
3+3 Law Program  
4+3 Law Program  
Davies Forum  
Dual Degree Program in Teacher Preparation  
First-Year Seminars  
Honors Program in the Humanities

#### **School of Management**

Dean: Elizabeth Davis

#### **Undergraduate Programs**

Bachelor of Science in Business Administration (BSBA)  
*Major in Accounting*  
*Major in Entrepreneurship and Innovation*  
*Major in Business Administration*  
*Major in Finance*  
*Major in Hospitality Management*  
*Major in International Business*  
*Major in Marketing*  
*Major in Organizational Behavior*  
Bachelor of Science in Management (BSM)  
Interdisciplinary Studies and Extended Education  
Military Science/ROTC

## **Minors**

- Business
  - Entrepreneurship and Innovation
  - Hospitality Management

## **Graduate Programs**

- Financial Analysis
  - Professional Financial Analysis
  - Accelerated Financial Analysis
- Global Entrepreneurship and Management Information Systems
- Biotechnology Concentration Information Security Concentration
- Nonprofit Administration
- Organization Development
- Public Administration (also offered online)
- MBA (with Concentrations in)
  - Entrepreneurship and Innovation Finance
  - International Business Marketing
  - Organization Development
- MBA for Executives
- Executive Education Immersion Programs

## **Dual Degree Programs**

- Asia Pacific Studies/MBA Environmental Management/MBA Financial Analysis/MBA
- Juris Doctor/MBA

## **School of Law**

Dean: John Trasviña

## **Doctoral Programs**

- Juris Doctor (JD)
- JD/MBA

## **Masters Programs**

- LLM in International Transactions and Comparative Law
- LLM in Intellectual Property and Technology Law
- LLM in Taxation
- Master in Legal Studies in Taxation

## **Certificate Programs**

- Labor and Employment Law
- Business Law
- International and Comparative Law
- Intellectual Property and Technology Law
- Public Interest Law
- Tax Law

## **School of Education**

Dean: Kevin Kumashiro

## **Credentials/Master of Arts Programs**

- School Counseling / Pupil Personnel Services (PPS) Credential Special Education with Mild/Moderate Education Specialist
- Credential
- Teacher Education

## **Preliminary CA Teaching Credential with one of the following master's degrees:**

- Masters in Teaching
  - Masters in Teaching Reading/Certificate in Teaching Reading
  - Masters in Teaching Urban Education and Social Justice
- Masters in Teaching with Concentration in Catholic School Teaching Masters in Digital Technologies for Teaching and Learning with Teaching Credential
- Masters in Teaching English to Speakers of Other Languages with Teaching Credential
  - San Francisco Teacher Residency
  - Bilingual Authorization

## **Master of Arts Programs**

- Catholic Educational Leadership
- Digital Technologies for Teaching and Learning
- Higher Education and Student Affairs
- Human Rights Education

International and Multicultural Education  
Marriage and Family Therapy  
Organization and Leadership  
TESOL  
TESOL Online

#### **Doctoral Programs (EdD)**

Catholic Educational Leadership International and Multicultural Education  
Human Rights Education (concentration) Second Language Acquisition (concentration)  
Learning and Instruction Organization and Leadership Special Education

#### **Certificate Programs**

Catholic Educational Leadership Advanced Studies Certificate  
Teaching Reading Certificate

#### **School of Nursing and Health Professions**

Dean: Judith Karshmer

#### **Undergraduate Major**

Nursing  
Health Services

#### **Certificate Programs**

Post Masters Clinical Nurse Leader  
Family Nurse Practitioner  
Instructional Systems Leadership

#### **Masters Program**

MPH Public Health (online in Fall 2015) MSN (Clinical Nurse Leader)  
MSN (Non-Nurses) MSN (Registered Nurses) MSN (online)  
MSBH (Behavioral Health)  
MS in Healthcare Simulation (online in Fall 2015) MS of Health Informatics (online)  
4+1 (Blended BSN to MSN) RN Transition Program

#### **Doctoral Programs**

Doctor of Nursing Practice (DNP)  
DNP (Family Nurse Practitioner)  
DNP (Health Care Systems Leadership) (online in Fall 2015)  
DNP (Executive Leadership)  
DNP (Mental Health Nurse Practitioner)  
DNP Completion  
Doctor of Psychology  
PsyD (Clinical Psychology with an Emphasis in Behavioral Health)

#### **Library Holdings**

**At the close of the 2015 academic year, the Gleeson Library/Geschke Learning Resource Center had the following holdings:**

Books:	738,947
Bound Volumes of	
Periodicals:	150,782
AV Materials:	27,087
CDs:	75
DVDs:	1,911
Microforms:	739,556
Maps:	3,825
Electronic Resources:	472,290

(includes eBooks, eJournals, Reference Databases)

#### **Financial Resources**

##### **(Fiscal Year 2015)**

Total operating base budget (FY 2015):	\$400,145,000
Total endowment (as of May 31, 2015):	\$310,727,000
Recent capital campaign goal (ended June 2007):	\$175,000,000
Total received in capital campaign:	\$178,410,357

**APPENDIX 2**  
**2014-15 BSQ Finances Module**

San Francisco, University of, School of Management
2014-15 BSQ Finances Module

Budgets and Funds (Northern America)

† = Only data provided for sections or questions marked by a dagger may be published by AACSB International in ways that attribute the data to the school.
\* = required field
Please note:
You may enter either the grand totals or the breakdowns in the financial calculations. If there is a number in the total field, the breakdown fields will show as gray. If there is a number in the breakdown field, the total will auto-calculate.

1. Fiscal Year \*

	Month	Year
Ending month and year of your most recently completed fiscal year	May	2014

2. Operating Budget † \*

Indicate the total business operating budget for the most recent complete 12 month period for which the budget is based. Include business unit faculty and staff salaries and benefits compensation. Estimate benefits compensation if necessary. Include all non-personnel budgets in which expenditures are controlled by the business unit, excluding scholarship payments. Include budgeted earnings from endowments, except those earmarked for scholarships. Include budgeted amount for annual giving.

	\$	Reported Last Year
Operating budget	32,325,425	27,292,473

3. Tuition and Required Fees †

- a. Undergraduate degree program academic year tuition and required fees
Typical total tuition and required fees for a full-time undergraduate business student for the current academic year. The academic year refers to the period of time generally extending from September to June; usually equating two semesters to trimesters, three quarters, or the period covered by a four-one-four plan. Do not include any optional or indirect costs, such as housing, books, utilities, food, personal expenses, transportation or other living expenses. Leave blank only if your school does not offer programs at this level. Enter "0" only if your school does offer programs at this level, but does not charge tuition for them.
- b. Full-time MBA degree total program tuition and required fees
Total program costs (from initial enrollment through graduation) tuition and required fees for a full-time MBA student who enters in the current academic year having met all program prerequisites. If necessary, estimate this number. Do not include any optional or indirect costs, such as housing, books, utilities, food, personal expenses, transportation or other living expenses. Leave blank only if your school does not offer programs at this level. Enter "0" only if your school does offer programs at this level, but does not charge tuition for them.

	My school offers this type of program:	Within Province/State	Out of Province/State	Out of Country	Online
a. Undergraduate degree program academic year tuition and required fees (provide for single academic year only)	x Yes o No	41,450	41,450	41,450	
Reported last year		39,840	39,840	39,840	
b. Full-time MBA degree total program tuition and required fees (provide Total Program Costs from initial enrollment through graduation)	x Yes o No	72,296	72,296	72,296	
Reported last year		70,280	70,280	70,280	

#### 4. Uses of Operating Funds

Report the total operating funds that were expended by the business unit in the most recently completed fiscal year for each category. Break these funds into Salary and Non-Salary amounts. Only include expenditures that are controlled by the business unit. Do not include expenditures by the institution's central administration even if used directly to benefit the business unit, unless otherwise instructed for the specific category. Enter amounts directly on the Total row (row q) only if you are unable to break the uses of funds down into the listed categories.

	Salary Expenditures	Non-Salary Expenditures	Total
a. Degree programs & instructional activity	13,093,156	1,095,643	14,188,799
b. Total benefits compensation	5,826,557		
c. Research	71,688	43,252	114,940
d. Public service	34,760	30,506	65,266
e1. Non-degree management education instruction - Open enrollment	6,214	188,202	194,416
e2. Non-degree management education instruction - Custom programs	194,048	39,935	233,983
e3. Non-degree management education instruction - Unallocated	0	0	0
e. Non-degree management education instruction - Total	200,262	228,137	428,399
f. Library	0	0	0
g. Technology	9,744	16,166	25,910
h. Student services and admissions	1,118,354	483,910	1,602,264
i. Scholarships	0	885,136	885,136
j. Administrative support	2,512,282	226,106	2,738,388
k. Auxiliary enterprises	0	0	0
l. Operation & maintenance of facilities	8,760	237,156	245,916
m. Faculty/staff recruiting expenditures	0	31,883	31,883
n. Alumni programs/services	169,356	133,616	302,972
o. Marketing & advertising	264,568	724,853	989,421
p. Other	3,087	122,980	126,067
q. Total of all uses of operating funds by the business unit	23,312,574	4,259,344	27,571,918
Total reported last year	23,427,363	4,059,848	27,487,211

#### 5. Sources of Operating Funds

Include funds received and available to the business unit. Include funds available for benefits compensation in the appropriate category regardless if the business unit controls these funds. Otherwise, include only funds controlled by the business unit.

	Amount
a1. General tuition & fees revenue	58,892,080
a2. Government appropriations (other than grants and contracts)	
a3. Institutional/University allocations	
a. General tuition & fees revenue, and government appropriations and institutional/university allocations - Total	58,892,080
b. Other charges to students for educational purposes	
c1. Government grants and contracts - Research	2,262
c2. Government grants and contracts - Other	
c. Government grants and contracts - Total	2,262
d1. Private contracts – Research	15,732
d2. Private contracts – Other	100
d. Private contracts - Total	15,832
e1. Non-degree management education - Open enrollment	152,788
e2. Non-degree management education - Custom programs	327,750
e3. Non-degree management education instruction - Unallocated	
e. Non-degree management education - Total	480,538
f.1. Private gifts and grants - Capital Purposes (not counted in Total below)	
f.2. Private gifts and grants - Current Operations: Restricted	286,681
f.3. Private gifts and grants - Current Operations: Unrestricted	
g. Total funds received and available from business unit endowment - Total	211,533
h. Other sources of operating funds	17,819
i. Total from all sources of operating funds	59,906,745
Total reported last year	56,633,833

6. Fundraising †

For the most recently ended fiscal year, please indicate what percentage of the Private Gifts and Grants amount in lines f.1. through f.3. above came from the following donor sources, in the corresponding columns. Each column should total 100 percent (if used). Please leave blank if no amounts are entered in lines f.1. through f.3. above.

	Capital Purposes Percentage (from row f1)	Current Operations: Restricted Percentage (from row f2)	Current Operations: Unrestricted Percentage (from row f3)
a1. Donations from individuals - Alumni		34.9	
a2. Donations from individuals - Non-alumni		35.0	
a. Donations from individuals - Total		69.9	
b. Donations from private charitable organizations/ foundations		22.4	
c. Donations from public organizations/foundations		3.1	
d. Donations from corporations		4.6	
e. Total		100.0	

#### 7. Endowment Market Value † \*

Endowment assets consist of gross investments of endowment funds, term endowment funds (e.g., quasi-endowment), and funds functioning as endowment for the business unit and any of its affiliated foundations and other affiliated organizations. If endowment assets are centralized with the institution, indicate only the value of assets whose income is used specifically to support the business unit. Report zero (0) if the institution does not clearly separate endowment by academic units.

In general, an endowment is a sum of money given to an institution with the requirement that its capital value is to be maintained, but the interest on it is to be used to support the work of the institution.

	\$	Reported Last Year
Total market value of the business unit endowment	22,473,708	13,736,178

#### Comments and Suggestions for Budgets & Funds Section

Optional: Please enter any comments or suggestions for this section, including: missing items that would be helpful to include; questions that are particularly relevant (or irrelevant) to your school's context; suggestions on how to improve specific questions; etc. This feedback will remain on file with your survey, but will not be reported in any way that will identify your school. AACSB will use these comments and suggestions to enhance the survey based on member requests.

Comments/Suggestions	
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**APPENDIX 3**  
**USF School of Management Faculty Qualifications**

### USF Faculty Qualifications

The School of Management (SOM) contributes to the lives of the students, faculty, staff, and community as a premier Jesuit teaching, research and service institution. The SOM offers management education for graduate and undergraduate students, which integrates its global connections with a distinctive regional network in the West.

The School of Management is a catalyst for change in business, government and non-profit managerial practices in the City of San Francisco and at the national level. Through research and teaching its impact can be felt through engagement in global diversity activities while fueling the entrepreneurial energy and social innovation of our region. We equally emphasize the importance of teaching, research and service in the academic community. We integrate experiential learning into our classrooms and encourage scholarship, which has impact in the disciplines and in the wider environment whether basic, applied or pedagogical.

We educate and prepare the next generation of conscious leaders to build effective, productive and socially responsible organizations in furtherance of the University mission and values.

We value human dignity and integrity, open and disciplined inquiry, combined with a collaborative and enterprising spirit. This provides a strong foundation to facilitate significant contributions by our graduates, students, faculty, and staff.

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	<b>Scholarly Academic (SA)</b>	<b>Practice Academic (PA)</b>	<b>Scholarly Practitioner (SP)</b>	<b>Instructional Practitioner (IP)</b>
<b>Standard Degree Requirements</b>	Ph.D.*	Ph.D.	Master's	Master's
<b>Relevant Contribution Lists</b> (see Appendices)	IC	PC, IC	IC, PC	PC, IC
<b>Minimum Points Required</b>	Six (6)	Six (6)	Six (6)	Six (6)** or Four (4)***
<b>Additional Requirements</b>	Four (4) points from peer- reviewed journals	At least four (4) points from PC List	At least four (4) points from the IC list	At least four (4) points from PC List

\* Alternative doctorates (ex. DPA, EdD, DBA, DM, etc.) may qualify as SA. (See Below.)

\*\* Six (6) points for Full-Time and Adjunct Participating Faculty

\*\*\* Four (4) points for Adjunct, Supporting Faculty

### **Faculty Qualifications for Scholarly Academic (SA) Status**

SA faculty members who are full-time are deemed to be participating faculty.

A faculty member in the USF School of Management qualifies as a Scholarly Academic (SA) provided s/he meets the following conditions:

- Possesses a research doctorate or equivalent terminal degree in a field related to the area of teaching. Graduate degrees in law or taxation will be considered sufficient for faculty teaching business law or taxation, respectively,  
*and*
- Has completed over the past five years
  - a) at least three (3) published, peer-reviewed journal articles related to the field in which the faculty member teaches for a total of six (6) points;  
*or*
  - b) at least two (2) published, peer-reviewed journal articles related to the field in which the faculty member teaches (equal to four (4) points) and two (2) additional points from the SA Intellectual Contribution (IC) list for a total of six (6) points. The IC list is in Appendix A.
  - c) Interdisciplinary research contributions will be judged in the same context as contributions in a single disciplinary area.

A faculty member who has earned a research doctorate or equivalent terminal degree in the past five (5) years qualifies as SA if s/he teaches in the field related to his/her doctoral degree.

A faculty member who is ABD qualifies as SA for three (3) years from the date they entered ABD status and if s/he teaches in the field related to his/her doctoral field of study.

A faculty member with a research doctorate, for example Ph.D. or DPA, who teaches in a discipline not related to his/her doctoral degree or a faculty member with a non-research doctorate (for example, Ed.D., DBA, DM, Executive DM, etc.) qualifies as SA provided s/he has completed a Bridge Program, which establishes a one-time, 5-year period for building an active research pipeline, related to the field in which the faculty member teaches.

A faculty member with a research doctorate but who teaches in a discipline not related to his/her doctoral degree or a faculty member with a doctorate other than a Ph.D. or DPA (for example, Ed.D., DBA, DM, Executive DM) qualifies as SA provided s/he has completed over the past five (5) years at least three (3) published, peer-reviewed journal articles related to the field in which the faculty member teaches (equal to six (6) points) and two (2) additional points from the Intellectual Contribution list for a total of eight (8) points. After a faculty member has achieved SA status, six (6) points must be earned from the IC list, four (4) of which must be from PRJs, to maintain SA status.

A faculty member may qualify as a Scholarly Academic in more than one discipline, provided s/he can demonstrate the appropriate academic preparation and scholarly activity.

### **Faculty Qualifications for Practice Academic (PA) Status**

Practice Academic status is granted to a faculty member who has appropriate academic preparation and relevant professional experience. Normally, a PA faculty member will have a research doctorate or equivalent terminal degree (*e.g.*, DBA, DM, JD, Master's in Taxation) in a field related to the area of teaching. In some cases, PA faculty may have previously served as SA faculty members who have shifted their scope of activities.

PA faculty members who are full-time are deemed to be participating faculty.

A faculty member in the USF School of Management qualifies as a Practice Academic (PA) provided s/he meets the following conditions:

1. Has accumulated six (6) points over the past five years from the Practice Contribution (PC) and IC lists, with at least four (4) points from the PC list. The PC list is in Appendix B.
2. Contributions must be related to the field in which the faculty member teaches. Interdisciplinary research contributions will be judged in the same context as contributions in a single disciplinary area.

#### **Faculty Qualifications for Scholarly Practitioner (SP) Status**

Scholarly Practitioner (SP) status is granted to a faculty member who has a master's degree in a field related to the area of the teaching assignment. For example, this might be an MBA degree or a specialized master's degree.

SP faculty members have master's degrees in disciplines related to their fields of teaching. In limited cases, SP status may be appropriate for individuals without master's degrees if the current depth, duration, sophistication, and complexity of their professional experience outweigh their lack of master's degree qualifications. In such cases, the burden of proof is on the individual faculty member to make her/his case.

SP faculty members who are full-time are deemed to be participating faculty.

For sustained SP status, the faculty member must have accumulated over the past five (5) years a total of six (6) points from the IC and PC lists. At least four (4) points must come from the IC list. Contributions must be related to the field in which the faculty member teaches. Interdisciplinary research contributions will be judged in the same context as contributions in a single disciplinary area.

#### **Faculty Qualifications for Instructional Practitioner (IP) Status**

Instructional Practitioner status (IP) is granted to a faculty member who has appropriate academic preparation and relevant professional experience. Normally, an IP faculty member will have a master's degree in a field related to the area of the teaching assignment. For example, this might be an MBA degree or a specialized master's degree in the area of instruction.

IP faculty members have master's degrees in disciplines related to their fields of teaching. In limited cases, IP status may be appropriate for individuals without master's degrees if the current depth, duration, sophistication, and complexity of their professional experience outweigh their lack of master's degree qualifications. In such cases, the burden of proof is on the individual faculty to make her/his case.

A faculty member is expected to maintain both currency and relevancy as an instructor by engaging in or contributing to practice or other forms of professional engagement on a regular basis.

IP faculty members who are full-time are deemed to be participating faculty.

For sustained IP status, a full-time, participating faculty member must have accumulated over the past five (5) years a total of six (6) points from the IC or PC lists. At least four (4) points must come from the PC list. Contributions must be related to the field in which the faculty member teaches. Interdisciplinary research contributions will be judged in the same context as contributions in a single disciplinary area.

For sustained IP status, an adjunct, supporting faculty member must have accumulated over the past five (5) years a total of four (4) points from the PC list. Contributions must be related to the field in which the faculty member teaches. Interdisciplinary contributions will be judged in the same context as contributions in a single disciplinary area.

## APPENDIX A – Intellectual Contribution (IC) List

The following lists of intellectual contributions are non-exhaustive:

### Intellectual Contributions valued at two (2) points each:

- Publishing a peer-reviewed journal article.
- Publishing a scholarly book.
- Publishing a textbook that has been widely adopted by peer schools.
- Publishing an article in an edited volume of readings or an invited chapter in a peer-edited scholarly book related to the field in which the faculty member teaches.
- Serving as an editor of an academic journal related to the field in which the faculty member teaches.
- Publishing in a trade journal, as defined by the faculty member's discipline, related to the field in which the faculty member teaches.
- Publishing a popular press book related to the field in which the faculty member teaches that achieves national or international distribution.
- Publishing a refereed proceedings paper from a conference related to the field in which the faculty member teaches.
- Publishing a scholarly monograph related to the field in which the faculty member teaches.
- Receiving a best paper award for a refereed presentation at a national conference related to the field in which the faculty member teaches.
- Serving as program chair for a conference related to the field in which the faculty member teaches.
- Delivering a refereed paper presentation at an academic or professional meeting related to the field in which the faculty member teaches.
- Publishing a written case study with instructional materials in a peer-reviewed journal related to the field in which the faculty member teaches, related to the field in which the faculty member teaches.
- Publishing an invited article in an academic journal or an edited scholarly book related to the field in which the faculty member teaches.

### Intellectual Contributions valued at one (1) point each:

- Serving as an associate editor of an academic journal related to the field in which the faculty member teaches.
- Ad hoc reviewing for an academic journal related to the field in which the faculty member teaches.
- Editing a scholarly book related to the field in which the faculty member teaches.
- Revising a previously published textbook related to the field in which the faculty member teaches.
- Serving as a member of the editorial board of an academic journal related to the field in which the faculty member teaches.
- Receiving significant media attention and recognition on a research topic related to the field in which the faculty member teaches.
- Serving as a track chair for a recognized conference related to the field in which the faculty member teaches.
- Publishing a book or e-book for application or pedagogy related to the field in which the faculty member teaches.
- Publishing a non-refereed paper in a conference proceedings related to the field in which the faculty member teaches.
- A major media publication, such as an op-ed piece, newspaper article or invited column, related to scholarly work and field in which the faculty member teaches.
- A major media presentation, such as serving on a panel of experts or as an invited expert, on a topic related to the scholarly work in which the faculty member teaches.
- Serving on the board of a national association related to the field in which the faculty member teaches.
- Reviewing papers submitted for possible presentation at a conference related to the field in which the faculty member teaches.
- Publishing a paper in a volume of non-refereed proceedings from a conference related to the field in which the faculty member teaches.
- An invited or peer reviewed address, presentation, lecture, or colloquium that includes written materials in a faculty member's area of expertise.
- Publishing a written case study with instructional materials not subjected to peer review before publication or other distribution, related to the field in which the faculty member teaches.
- Publishing a widely-adopted software program or simulation related to the field in which the faculty member teaches.
- Writing a grant proposal funded by a major funding agency that is related to the field in which the faculty member teaches.
- Authoring a widely-disseminated report from a sponsored research project related to the field in which the faculty member teaches.
- Publishing the second (or higher) edition of a textbook.
- Revising a scholarly book, monograph, textbook, textbook chapter, or trade book related to the field in which the faculty member teaches.

## APPENDIX B – Practice (PC) List

The following lists of intellectual contributions are non-exhaustive:

### Practice Contributions valued at two (2) points each:

- Developing and delivering on a regular basis executive education seminars or continuing professional education (CPE) classes related to the field in which the faculty member teaches.
- Serving as a member of an AACSB peer review team.
- Serving in a significant leadership position in a business, non-profit, or public-service organization related to the field in which the faculty member teaches, *e.g.*, on a Board of Directors
- Consulting activities of a significant level and/or duration, related to the field in which the faculty member teaches, for either a for-profit, non-profit, or public-service organization, in either a paid or volunteer capacity.

### Practice Contributions valued at one (1) point each:

- Receiving significant media attention and recognition on a research topic related to the field in which the faculty member teaches.
- Publishing a widely-read professional newsletter or blog related to the field in which the faculty member teaches.
- Serving as an expert witness on a topic related to area of teaching.
- Maintaining or earning professional or technical certifications, or obtaining or maintaining a professional license related to the field in which the faculty member teaches.
- Attending on a regular basis continuing education classes related to the field in which the faculty member teaches.
- Attending on a regular basis professional workshops or seminars offered in a field related to the field in which the faculty member teaches.
- Completing a faculty internship at a business, non-profit, or public-service organization related to the field in which the faculty member teaches.
- Managing or participating in a business related to the field in which the faculty member teaches.
- Publishing a non-peer reviewed article in a widely-disseminated trade publication related to the field in which the faculty member teaches.
- Enrolling on a regular basis in continuing professional education classes offered in the relevant area of teaching.

### Practice Contributions valued at one (1) point each:

- Participate in professional workshops and/or conferences that focus on area of teaching.
- An invited address, presentation, or lecture, in a faculty member's area of expertise.
- Authoring a widely-disseminated report from a sponsored research project related to the field in which the faculty member teaches.
- Active service on a professional committee for a business, non-profit, or public-service organization, related to the field in which the faculty member teaches.
- Developing innovative instructional tools that are widely adopted within professional or educational organizations by the education or professional industries related to the field in which the faculty member teaches.
- Participating in educational workshops or professional education classes (CPE) intended to improve teaching performance, related to the field in which the faculty member teaches
- Creating a new course (undergraduate or masters) related to area of teaching related to the field in which the faculty member teaches
- Developing written materials that incorporate industry best practices of a significant nature for existing courses; this may include current content and design, or other improvements and innovations

#### **APPENDIX D – Faculty Members Serving in Administrative Roles**

Faculty members who possess a research doctorate or equivalent terminal degree, who serve in key administrative roles (e.g., dean, associate dean, department chairs, and program directors) and who are teaching are deemed Practice Academic (PA) unless during their administrative tenure they maintain a SA status.

An administrator who returns to a department in compliance with SA standard shall be SA. Otherwise, the administrator shall be deemed PA for two years. By the third year, the former administrator must have accrued four (4) points from the IC or PC lists to remain PA. By the fifth year, the former administrator is expected to achieve the standards for SA or PA.

#### **APPENDIX E – Faculty Members On Leave**

A full-time faculty member who spent at least one quarter during the past five years on family leave or sick leave taken under the Family and Medical Leave Act is qualified if his or her scholarly/professional record meets the requirements over the most recent 60 months in which he or she actively served on the faculty. For example, a faculty member who took three months of family leave or sick leave is qualified if his or her scholarly/professional record over the past 63 months meets the relevant standard.

#### **APPENDIX F – Part-Time Faculty Standards to be Deemed Participating**

Part-Time Faculty will be deemed “Supporting” unless they spend substantive time and effort engaged in:

1. Curriculum development, such as course development, workshops, etc.
2. Committee service, such as curriculum development/revision, program assessment, etc.
3. Work on/with program advisor board.
4. Advising of students and/or student organizations.
5. Regular attendance at department meetings.
6. Responsibility for student advising.
7. Regular service on the School of Management Undergraduate Program Committee, Graduate Program Committee, Faculty Development Committee, and/or School or University constituted task forces/committees.
8. Regular service as faculty advisor to a student organization.
9. Regular participation in formulating and executing the assurance of learning/continuous improvement process.

**APPENDIX 4**  
**AACSB Required Tables**



Table 2-1 Intellectual Contributions													
Part A: Five-Year Summary of Intellectual Contributions													
Faculty	Portfolio of Intellectual Contributions			Types of Intellectual Contributions								Percentages of Faculty producing ICs	
	Basic or Discovery Scholarship	Applied or Integration/ Application Scholarship	Teaching and Learning Scholarship	Peer-Reviewed Journals	Research Monographs	Academic/Professional Meeting Proceedings	Competitive Research Awards Received	Textbooks	Cases	Other Teaching Materials	Other IC Type Selected by the School	Percent of Participating Faculty Producing ICs *= <i>Is Participating</i>	Percentage of Total FTE Faculty Producing ICs % <i>Dedicated to mission</i>
Aggregate and summarize data to reflect the organizational structure of the school's faculty (e.g. departments, research groups). Do not list by individual faculty member.													
<b>Accounting</b>													
<b>Professor</b>													
Diane Roberts	17	3	0	5	0	4	0	0	0	0	11	*	100%
<b>Total Professor</b>	17	3	0	5	0	4	0	0	0	0	11	100%	100%
<b>Associate Professor</b>													
Carol Graham	2 (2)	0	3 (2)	2 (1)	0	0	0	0	0	0	3 (3)	*	100%
John Koeplin	1 (1)	3 (2)	3 (2)	4 (3)	0	1	0	0	0	0	2 (2)	*	100%
Todd Sayre	5	0	2 (2)	2 (1)	0	0	0	0	0	0	5 (1)	*	100%
<b>Total Associate Professor</b>	8 (3)	3 (2)	8 (6)	8 (5)	0	1	0	0	0	0	10 (6)	100%	100%
<b>Assistant Professor</b>													
Fernando Comiran	2	0	0	1	0	0	0	0	0	0	1	*	100%
Tatiana Fedyk	12	0	1	0	0	0	0	0	0	0	13	*	100%
Joohyung Ha	7	0	0	1	0	0	1	0	0	0	5	*	100%
Nicholas Ross <sup>1</sup>	1	6	0	1	0	0	0	0	0	0	6	*	58.5%
<b>Total Assistant Professor</b>	22	6	1	3	0	0	1	0	0	0	25	100%	100%
<b>Adjunct Faculty</b>													
Nikhil Bassi	0	0	0	0	0	0	0	0	0	0	0		33%
Dominic Daher	0	0	0	0	0	0	0	0	0	0	0	*	100%
George DeVries	0	0	0	0	0	0	0	0	0	0	0		66%
Lynn Henley	0	0	0	0	0	0	0	0	0	0	0		17%
Maleeha Khan	0	0	0	0	0	0	0	0	0	0	0		33%
Barbara Lougee <sup>2</sup>	0	0	0	0	0	0	0	0	0	0	0		20%

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Dawn Mayer	1	0	0	0	0	0	0	0	0	0	1		20%
Masooma Mir	0	0	0	0	0	0	0	0	0	0	0		33%
John O'Shaughnessy	2	12	0	2	0	0	0	0	0	0	12		33%
Zola Rodgers	0	0	0	0	0	0	0	0	0	0	0		33%
Wesley Selke	0	0	0	0	0	0	0	0	0	0	0		33%
Kathryn Troxel	0	0	0	0	0	0	0	0	0	0	0		20%
Jennifer Wells	0	0	0	0	0	0	0	0	0	0	0		33%
<b>Total Adjunct Faculty</b>	3	12	0	2	0	0	0	0	0	0	13	0%	11.18%
<b>Term Instructor</b>													
Claudia Roehl	0	1	2	0	0	0	0	0	0	0	3	*	100%
<b>Total Term Instructor</b>	0	1	2	0	0	0	0	0	0	0	3	100%	100%
<b>Total Accounting</b>	50 <sup>(3)</sup>	25 <sup>(2)</sup>	11 <sup>(6)</sup>	18 <sup>(5)</sup>	0	5	1	0	0	0	62 <sup>(6)</sup>	90%	68.41%

<b>Business Analytics and Information Systems</b>													
<b>Professor</b>													
Steven Alter	77 <sup>(1)</sup>	0	1	17	0	17 <sup>(1)</sup>	0	0	0	0	44	*	100%
Thomas Grossman	2 <sup>(1)</sup>	6	3 <sup>(3)</sup>	1	0	2 <sup>(1)</sup>	0	0	0	0	8 <sup>(3)</sup>	*	100%
Stephen Huxley	2 <sup>(1)</sup>	27 <sup>(4)</sup>	1	2 <sup>(2)</sup>	0	0	2	0	0	0	26 <sup>(3)</sup>	*	100%
Paul Lorton Jr	5 <sup>(4)</sup>	3	4 <sup>(1)</sup>	4 <sup>(3)</sup>	0	1 <sup>(1)</sup>	0	0	0	0	7 <sup>(1)</sup>	*	100%
Vijay Mehrotra	5 <sup>(1)</sup>	38	9 <sup>(3)</sup>	3	0	2 <sup>(1)</sup>	0	0	0	0	47 <sup>(3)</sup>	*	100%
Joel Oberstone	2 <sup>(2)</sup>	1	7	3 <sup>(1)</sup>	0	2	0	0	0	0	5 <sup>(1)</sup>	*	100%
<b>Total Professor</b>	93 <sup>(10)</sup>	75 <sup>(4)</sup>	25 <sup>(7)</sup>	30 <sup>(6)</sup>	0	24 <sup>(4)</sup>	2	0	0	0	137 <sup>(11)</sup>	100%	100%
<b>Assistant Professor</b>													
Moirra Gunn	13 <sup>(4)</sup>	12 <sup>(2)</sup>	5 <sup>(1)</sup>	4 <sup>(3)</sup>	0	1 <sup>(1)</sup>	0	0	0	0	25 <sup>(3)</sup>	*	100%
<b>Total Assistant Professor</b>	13 <sup>(4)</sup>	12 <sup>(2)</sup>	5 <sup>(1)</sup>	4 <sup>(3)</sup>	0	1 <sup>(1)</sup>	0	0	0	0	25 <sup>(3)</sup>	100%	100%
<b>Adjunct Faculty</b>													
Ornella Bonamassa	0	0	0	0	0	0	0	0	0	0	0		33%
Helmut Buehler	0	0	0	0	0	0	0	0	0	0	0		25%
Andrew Buteau <sup>3</sup>	0	0	0	0	0	0	0	0	0	0	0		8%
Robert Chow	0	0	0	0	0	0	0	0	0	0	0		25%
Donald Danner	0	0	0	0	0	0	0	0	0	0	0		33%
Daryoush Farsi	0	0	0	0	0	0	0	0	0	0	0		33%
Mary Holcomb	0	0	0	0	0	0	0	0	0	0	0		25%
Yannet Interian <sup>4</sup>	0	4	3	1	0	0	0	0	0	0	6		33%
Paul Intrevado	5	0	0	1	0	0	2	0	0	0	2	*	100%
Payson Johnston	2 <sup>(2)</sup>	0	0	0	0	1 <sup>(1)</sup>	0	0	0	0	1 <sup>(1)</sup>		66%
Velitchka Kaltcheva <sup>5</sup>	21 <sup>(14)</sup>	0	5 <sup>(1)</sup>	11 <sup>(8)</sup>	0	0	3	0	0	0	12 <sup>(7)</sup>		16%
Vera Klimkovskaia	0	0	0	0	0	0	0	0	0	0	0		33%
William Kolb	0	0	0	0	0	0	0	0	0	0	0	*	25%

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Edward Kreutzer	0	0	0	0	0	0	0	0	0	0	0		58%
Steven Lopez	0	0	0	0	0	0	0	0	0	0	0		25%
Brian MacDonald	0	0	0	0	0	0	0	0	0	0	0		22%
Marco Massenzio <sup>6</sup>	0	0	0	0	0	0	0	0	0	0	0		8%
Nola Masterson	1 <sup>(1)</sup>	0	0	1 <sup>(1)</sup>	0	0	0	0	0	0	0		33%
Kevin Potcner	0	6	0	1	0	0	0	0	0	0	5		17%
John Sander	0	0	0	0	0	0	0	0	0	0	0		33%
<b>Total Adjunct Faculty</b>	29 <sup>(17)</sup>	10	8 <sup>(1)</sup>	15 <sup>(9)</sup>	0	1 <sup>(1)</sup>	5	0	0	0	26 <sup>(8)</sup>	50%	40.71%
<b>Term Assistant Professor</b>													
Muhammad Al-Abdullah	2	3	0	0	0	3	0	0	0	0	2	*	100%
<b>Total Term Assistant Professor</b>	2	3	0	0	0	3	0	0	0	0	2	100%	100%
<b>Term Associate Professor</b>													
Stephen Morris	2	3 <sup>(1)</sup>	1	1	0	0	0	0	0	0	5 <sup>(1)</sup>	*	100%
Mouwafac Sidaoui	2	0	4 <sup>(2)</sup>	0	0	0	0	0	0	0	6 <sup>(2)</sup>	*	100%
<b>Total Term Associate Professor</b>	4	3 <sup>(1)</sup>	5 <sup>(2)</sup>	1	0	0	0	0	0	0	11 <sup>(3)</sup>	100%	100%
<b>Total Business Analytics and Information Systems</b>	141 <sup>(31)</sup>	103 <sup>(7)</sup>	43 <sup>(11)</sup>	50 <sup>(18)</sup>	0	29 <sup>(6)</sup>	7	0	0	0	201 <sup>(25)</sup>	91.67%	76.62%

<b>Economics, Law, and International Business</b>													
<b>Professor</b>													
W Becker	1 <sup>(1)</sup>	0	0	1 <sup>(1)</sup>	0	0	0	0	0	0	0	*	100%
Daniel Blakley	5 <sup>(3)</sup>	0	0	1 <sup>(1)</sup>	0	0	0	0	0	0	4 <sup>(2)</sup>	*	100%
Karl Boedecker	13 <sup>(1)</sup>	2	2 <sup>(2)</sup>	4 <sup>(1)</sup>	0	0	0	0	0	0	13 <sup>(2)</sup>	*	100%
James Shaw	0	1	2	0	0	0	0	0	0	0	3	*	100%
Xiaohua Yang	41 <sup>(6)</sup>	10 <sup>(4)</sup>	17 <sup>(3)</sup>	10 <sup>(2)</sup>	0	9 <sup>(1)</sup>	6	0	4 <sup>(2)</sup>	0	39 <sup>(8)</sup>	*	100%
<b>Total Professor</b>	60 <sup>(11)</sup>	13 <sup>(4)</sup>	21 <sup>(5)</sup>	16 <sup>(5)</sup>	0	9 <sup>(1)</sup>	6	0	4 <sup>(2)</sup>	0	59 <sup>(12)</sup>	100%	100%
<b>Associate Professor</b>													
Richard Johnson III <sup>7</sup>	51	1	2	9	0	0	1	0	0	0	44	*	100%
Peggy Takahashi	3 <sup>(3)</sup>	0	1 <sup>(1)</sup>	1 <sup>(1)</sup>	0	0	0	0	0	0	3 <sup>(3)</sup>	*	100%
<b>Total Associate Professor</b>	54 <sup>(3)</sup>	1	3 <sup>(1)</sup>	10 <sup>(1)</sup>	0	0	1	0	0	0	47 <sup>(3)</sup>	100%	100%
<b>Adjunct Faculty</b>													
Ronald Babin <sup>8</sup>	0	0	0	0	0	0	0	0	0	0	0		25%
Robert Derbin	0	0	0	0	0	0	0	0	0	0	0		33%
Reza Dibadj <sup>9</sup>	2	0	0	1	0	0	0	0	0	0	1		24%
Vivian Faustino-Pulliam	0	0	2	0	0	0	0	0	0	0	2		66%
Steven Fichera	0	0	0	0	0	0	0	0	0	0	0		66%
David Griffis	0	0	2	0	0	0	0	0	0	0	2	*	66%
Bikku Kuruvila	0	0	0	0	0	0	0	0	0	0	0		16%
Stanley Kwong	0	5	1 <sup>(1)</sup>	0	0	0	0	0	1 <sup>(1)</sup>	0	5	*	73.2%

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Michael Lehmann	0	0	0	0	0	0	0	0	0	0	0		33%
Mitesh Patel	0	0	0	0	0	0	0	0	0	0	0		66%
Carolyn Shaw	0	0	0	0	0	0	0	0	0	0	0		33%
Loran Simon	0	2	0	0	0	0	0	0	0	0	2		33%
Alan Spector	0	0	0	0	0	0	0	0	0	0	0		33%
<b>Total Adjunct Faculty</b>	2	7	5 (1)	1	0	0	0	0	1 (1)	0	12	100%	46.23%
<b>Term Assistant Professor</b>													
Isabelle Lescent-Giles	1	0	0	0	0	0	0	0	0	0	1	*	77.3%
<b>Total Term Assistant Professor</b>	1	0	0	0	0	0	0	0	0	0	1	100%	100%
<b>Total Economics, Law, and International Business</b>	117 (14)	21 (4)	29 (7)	27 (6)	0	9 (1)	7	0	5 (3)	0	119 (15)	100%	77.31%

<b>Entrepreneurship, Innovation, and Strategy</b>													
<b>Professor</b>													
Jonathan Allen	15 (2)	7	9	6 (2)	0	7	0	0	0	0	18	*	100%
David Batstone	1	0	0	0	0	0	0	0	0	0	1	*	100%
Mark Cannice	7 (4)	30	6	3 (2)	26	1 (1)	1	3	0	0	9 (1)	*	100%
Roger (Rongxin) Chen	10 (3)	6 (1)	3 (3)	5 (1)	0	0	0	0	2 (2)	0	12 (4)	*	100%
Elizabeth Davis	34	0	6	5	0	11	6	0	0	0	18	*	100%
<b>Total Professor</b>	67 (9)	43 (1)	24 (3)	19 (5)	26	19 (1)	7	3	2 (2)	0	58 (5)	100%	100%
<b>Associate Professor</b>													
Sun-Young Park	9 (1)	14 (3)	9 (5)	12 (4)	0	8 (3)	3	0	0	0	9 (2)	*	100%
<b>Total Associate Professor</b>	9 (1)	14 (3)	9 (5)	12 (4)	0	8 (3)	3	0	0	0	9 (2)	100%	100%
<b>Assistant Professor</b>													
Monika Hudson	12	7 (1)	32 (4)	8 (2)	0	0	4 (1)	0	1	0	38 (2)	*	100%
Jennifer Walske	20	4	12	3	0	2	0	0	3	0	28	*	100%
Liang Wang	19	0	0	4	0	1	0	0	0	0	14	*	100%
<b>Total Assistant Professor</b>	51	11 (1)	44 (4)	15 (2)	0	3	4 (1)	0	4	0	80 (2)	100%	100%
<b>Adjunct Faculty</b>													
Brett Bonthron	0	0	0	0	0	0	0	0	0	0	0		17%
John Branch <sup>10</sup>	0	0	0	0	0	0	0	0	0	0	0		17%
Majid Dadgar <sup>11</sup>	1	9	0	0	0	4	0	0	0	0	6		22%
David Epstein	0	0	0	0	0	0	0	0	0	0	0		33%
Goodarz Goodarzi	0	0	0	0	0	0	0	0	0	0	0	*	20%
Dan Himelstein	0	0	0	0	0	0	0	0	0	0	0		66%
Eric Lacy	0	0	0	0	0	0	0	0	0	0	0		33%
James Lee	0	0	0	0	0	0	0	0	0	0	0		33%
Jonathan Littman	1	0	0	0	0	0	0	0	0	0	1		33%
Luigi Lucaccini	0	0	0	0	0	0	0	0	0	0	0		33%

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Patrick O'Regan Jr	0	0	1	0	0	0	0	0	0	0	1	*	33%
Susan Stryker	0	0	0	0	0	0	0	0	0	0	0		66%
<b>Total Adjunct Faculty</b>	2	9	1	0	0	4	0	0	0	0	8	50%	21.67%
<b>Term Assistant Professor</b>													
Lan-Huong Nguyen	0	0	0	0	0	0	0	0	0	0	0	*	100%
<b>Total Term Assistant Professor</b>	0	0	0	0	0	0	0	0	0	0	0	0%	0%
<b>Term Associate Professor</b>													
Laurie MacPherson	0	5	1	0	0	0	0	0	0	0	6	*	100%
<b>Total Term Associate Professor</b>	0	5	1	0	0	0	0	0	0	0	6	100%	100%
<b>Term Instructor</b>													
Gleb Nikitenko	1	3	3 <sup>(2)</sup>	2 <sup>(1)</sup>	0	1	0	0	0	0	4 <sup>(1)</sup>	*	100%
<b>Total Term Instructor</b>	1	3	3 <sup>(2)</sup>	2 <sup>(1)</sup>	0	1	0	0	0	0	4 <sup>(1)</sup>	100%	100%
<b>Total Entrepreneurship, Innovation, and Strategy</b>	130 <sup>(10)</sup>	85 <sup>(5)</sup>	82 <sup>(14)</sup>	48 <sup>(12)</sup>	26	35 <sup>(4)</sup>	14 <sup>(1)</sup>	3	6 <sup>(2)</sup>	0	165 <sup>(10)</sup>	85.71%	73.97%

<b>Finance</b>													
<b>Professor</b>													
Barry Doyle	3 <sup>(3)</sup>	4 <sup>(4)</sup>	0	1 <sup>(1)</sup>	0	3 <sup>(3)</sup>	0	0	0	0	3 <sup>(3)</sup>	*	100%
Robert Mefford	2 <sup>(2)</sup>	15 <sup>(3)</sup>	0	5	0	7 <sup>(3)</sup>	0	0	0	0	5 <sup>(2)</sup>	*	100%
Manuel Tarrazo	6	3 <sup>(1)</sup>	3	6 <sup>(1)</sup>	0	2	0	0	0	0	4	*	100%
Nicholas Tay	4	8 <sup>(4)</sup>	1	3	0	2 <sup>(2)</sup>	0	0	0	0	8 <sup>(2)</sup>	*	100%
John Veitch	1 <sup>(1)</sup>	0	0	1 <sup>(1)</sup>	0	0	0	0	0	0	0	*	100%
<b>Total Professor</b>	16 <sup>(6)</sup>	30 <sup>(12)</sup>	4	16 <sup>(3)</sup>	0	14 <sup>(8)</sup>	0	0	0	0	20 <sup>(7)</sup>	100%	100%
<b>Associate Professor</b>													
Ludwig Chincarini	22	21	1	7	0	0	0	0	0	0	37	*	100%
Cathy Goldberg	4 <sup>(2)</sup>	0	0	2 <sup>(2)</sup>	0	1	0	0	0	0	1	*	100%
Man-Lui Lau <sup>12</sup>	0	0	0	0	0	0	0	0	0	0	0		66.5%
<b>Total Associate Professor</b>	26 <sup>(2)</sup>	21	1	9 <sup>(2)</sup>	0	1	0	0	0	0	38	100%	75.05%
<b>Assistant Professor</b>													
Xiaoya Ding	27	0	0	0	0	0	0	0	0	0	27	*	100%
<b>Total Assistant Professor</b>	27	0	0	0	0	0	0	0	0	0	27	100%	100%
<b>Adjunct Faculty</b>													
Daniel Amir	0	0	0	0	0	0	0	0	0	0	0		33%
Satish Ananthaswamy	0	0	0	0	0	0	0	0	0	0	0	*	66%
Jeffrey Breyer	0	0	0	0	0	0	0	0	0	0	0		0%
Brent Burns	0	5 <sup>(3)</sup>	0	0	0	0	0	0	0	0	5 <sup>(3)</sup>		66%
Peter Chau	0	0	0	0	0	0	0	0	0	0	0		11.7%
Patrick Collins	0	0	0	0	0	0	0	0	0	0	0		20%
J. Brad Craig	0	0	0	0	0	0	0	0	0	0	0		17%

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George Devine	0	0	0	0	0	0	0	0	0	0	0		33%
April Elam	0	0	0	0	0	0	0	0	0	0	0		16%
Mariia Eroshin	0	0	0	0	0	0	0	0	0	0	0		17%
Yuri Fedyk	0	0	0	0	0	0	0	0	0	0	0	*	20%
Mark Fredenburg	0	0	0	0	0	0	0	0	0	0	0	*	17%
Nabanita Ghosh	0	0	0	0	0	0	0	0	0	0	0		33%
John Green	0	0	0	0	0	0	0	0	0	0	0	*	66%
Kirsten Hilbert	0	0	0	0	0	0	0	0	0	0	0		0%
Michael Jonas <sup>13</sup>	0	0	0	0	0	0	0	0	0	0	0	*	100%
Damon Krytzer	0	0	0	0	0	0	0	0	0	0	0		37%
Richard Libby	0	0	0	0	0	0	0	0	0	0	0		20%
Michael Maestas	0	0	0	0	0	0	0	0	0	0	0	*	33%
Jonathan Mandle	0	0	0	0	0	0	0	0	0	0	0		20%
Michael Pastena	0	0	0	0	0	0	0	0	0	0	0	*	33%
Jonathan Rico	0	0	0	0	0	0	0	0	0	0	0		20%
Andrew Shamiya	0	0	0	0	0	0	0	0	0	0	0		20%
Mark Sherman	0	0	0	0	0	0	0	0	0	0	0		25%
Lawrence Souza	0	0	0	0	0	0	0	0	0	0	0		33%
Torben Voetmann	2	4	0	3	0	0	0	0	0	0	3		17%
Loren Walden	0	0	0	0	0	0	0	0	0	0	0	*	33%
Christopher Winiarz	0	0	0	0	0	0	0	0	0	0	0		20%
Man Chiu Wong <sup>14</sup>	9	3	0	8	0	0	2	0	0	0	2	*	17%
<b>Total Adjunct Faculty</b>	11	12 <sub>(3)</sub>	0	11	0	0	2	0	0	0	10 <sub>(3)</sub>	11.11%	11.85%
<b>Term Assistant Professor</b>													
Ivan Asensio	2	9	0	0	0	0	2	0	0	0	9	*	100%
John Gonzales	0	1	0	1	0	0	0	0	0	0	0	*	100%
<b>Total Term Assistant Professor</b>	2	10	0	1	0	0	2	0	0	0	9	100%	100%
<b>Term Associate Professor</b>													
Frank Ohara	1	0	0	0	0	0	0	0	0	0	1	*	100%
Kashi Tiwari	27	0	0	0	0	0	0	0	0	0	27	*	100%
<b>Total Term Associate Professor</b>	28	0	0	0	0	0	0	0	0	0	28	100%	100%
<b>Total Finance</b>	110 <sub>(8)</sub>	73 <sub>(15)</sub>	5	37 <sub>(5)</sub>	0	15 <sub>(8)</sub>	4	0	0	0	132 <sub>(10)</sub>	61.9%	61.61%

<b>Hospitality Management</b>													
<b>Associate Professor</b>													
Michael Collins	6 <sub>(2)</sub>	18	5 <sub>(1)</sub>	4	0	6 <sub>(1)</sub>	0	0	0	0	19 <sub>(2)</sub>	*	100%
Thomas Maier	5 <sub>(2)</sub>	21 <sub>(1)</sub>	6	13 <sub>(1)</sub>	1	0	4 <sub>(2)</sub>	1	0	0	13	*	100%
<b>Total Associate Professor</b>	11 <sub>(4)</sub>	39 <sub>(1)</sub>	11 <sub>(1)</sub>	17 <sub>(1)</sub>	1	6 <sub>(1)</sub>	4 <sub>(2)</sub>	1	0	0	32 <sub>(2)</sub>	100%	100%
<b>Assistant Professor</b>													

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Michelle Millar	11 <sup>(2)</sup>	17 <sup>(5)</sup>	13 <sup>(6)</sup>	11 <sup>(4)</sup>	0	6 <sup>(4)</sup>	0	0	0	0	24 <sup>(5)</sup>	*	100%
<b>Total Assistant Professor</b>	11 <sup>(2)</sup>	17 <sup>(5)</sup>	13 <sup>(6)</sup>	11 <sup>(4)</sup>	0	6 <sup>(4)</sup>	0	0	0	0	24 <sup>(5)</sup>	100%	100%
<b>Adjunct Faculty</b>													
Kathy Odsather	0	0	0	0	0	0	0	0	0	0	0	*	100%
Jeffrey Scharosch	0	0	0	0	0	0	0	0	0	0	0	*	33%
<b>Total Adjunct Faculty</b>	0	0	0	0	0	0	0	0	0	0	0	0%	0%
<b>Term Instructor</b>													
Jean-Marc Fullsack	0	0	0	0	0	0	0	0	0	0	0	*	100%
<b>Total Term Instructor</b>	0	0	0	0	0	0	0	0	0	0	0	0%	0%
<b>Total Hospitality Management</b>	22 <sup>(6)</sup>	56 <sup>(6)</sup>	24 <sup>(7)</sup>	28 <sup>(5)</sup>	1	12 <sup>(5)</sup>	4 <sup>(2)</sup>	1	0	0	56 <sup>(7)</sup>	50%	56.29%

<b>Marketing</b>													
<b>Professor</b>													
Leslie Goldgehn	2 <sup>(1)</sup>	1	12 <sup>(2)</sup>	3 <sup>(1)</sup>	0	0	0	0	0	0	12 <sup>(2)</sup>	*	100%
Nicholas Imparato	5 <sup>(2)</sup>	2 <sup>(1)</sup>	2	3 <sup>(2)</sup>	0	1	0	0	0	0	5 <sup>(1)</sup>	*	100%
<b>Total Professor</b>	7 <sup>(3)</sup>	3 <sup>(1)</sup>	14 <sup>(2)</sup>	6 <sup>(3)</sup>	0	1	0	0	0	0	17 <sup>(3)</sup>	100%	100%
<b>Associate Professor</b>													
Jonathan Barsky	12	0	0	3	0	1	0	0	0	0	8	*	100%
Shenzhao Fu	0	2	0	0	0	0	0	0	0	0	2	*	100%
Anthony Patino	17 <sup>(15)</sup>	2	2 <sup>(1)</sup>	11 <sup>(8)</sup>	0	0	1	0	0	0	9 <sup>(8)</sup>	*	100%
Sweta Thota	17 <sup>(2)</sup>	0	0	7	0	2 <sup>(1)</sup>	5	0	0	0	3 <sup>(1)</sup>	*	100%
Ricardo Villarreal	11 <sup>(2)</sup>	4	5	4	0	1 <sup>(1)</sup>	0	0	0	0	15 <sup>(1)</sup>	*	100%
<b>Total Associate Professor</b>	57 <sup>(19)</sup>	8	7 <sup>(1)</sup>	25 <sup>(8)</sup>	0	4 <sup>(2)</sup>	6	0	0	0	37 <sup>(10)</sup>	100%	100%
<b>Assistant Professor</b>													
Sonja Poole	1	7 <sup>(2)</sup>	9 <sup>(1)</sup>	3	0	5	0	0	0	0	9 <sup>(3)</sup>	*	100%
<b>Total Assistant Professor</b>	1	7 <sup>(2)</sup>	9 <sup>(1)</sup>	3	0	5	0	0	0	0	9 <sup>(3)</sup>	100%	100%
<b>Adjunct Faculty</b>													
John Durham	0	0	0	0	0	0	0	0	0	0	0	*	33%
Robert Koran	0	0	0	0	0	0	0	0	0	0	0		20%
Mohammed Nadeem	0	5	0	3	0	0	0	0	0	0	2		66%
Linda Saytes	0	0	0	0	0	0	0	0	0	0	0		33%
Stephan Sorger	0	0	0	0	0	0	0	0	0	0	0		33%
<b>Total Adjunct Faculty</b>	0	5	0	3	0	0	0	0	0	0	2	0%	35.68%
<b>Term Assistant Professor</b>													
An Tran	4	0	0	0	0	0	0	0	0	0	4	*	100%
<b>Total Term Assistant Professor</b>	4	0	0	0	0	0	0	0	0	0	4	100%	100%

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Term Instructor													
John O'Meara	1	2	2	0	0	0	0	0	0	0	5	*	100%
<b>Total Term Instructor</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>100%</b>	<b>100%</b>
<b>Total Marketing</b>	<b>70</b> <sup>(22)</sup>	<b>25</b> <sup>(3)</sup>	<b>32</b> <sup>(4)</sup>	<b>37</b> <sup>(11)</sup>	<b>0</b>	<b>10</b> <sup>(2)</sup>	<b>6</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>74</b> <sup>(16)</sup>	<b>90.91%</b>	<b>89.96%</b>

## Organization, Leadership, and Communication

Professor													
Kathleen Kane	1 <sup>(1)</sup>	3	19 <sup>(4)</sup>	4 <sup>(2)</sup>	0	1	0	0	0	0	18 <sup>(3)</sup>	*	100%
<b>Total Professor</b>	<b>1</b> <sup>(1)</sup>	<b>3</b>	<b>19</b> <sup>(4)</sup>	<b>4</b> <sup>(2)</sup>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>18</b> <sup>(3)</sup>	<b>100%</b>	<b>100%</b>
Associate Professor													
Linda Henderson	2 <sup>(2)</sup>	0	3 <sup>(3)</sup>	3 <sup>(3)</sup>	0	0	0	0	0	0	2 <sup>(2)</sup>	*	100%
Jennifer Parlamis	26 <sup>(9)</sup>	1	5 <sup>(1)</sup>	6	0	3 <sup>(1)</sup>	0	0	0	0	23 <sup>(9)</sup>	*	100%
Richard Stackman	4 <sup>(2)</sup>	11	0	3 <sup>(2)</sup>	0	0	0	0	0	0	12	*	100%
<b>Total Associate Professor</b>	<b>32</b> <sup>(13)</sup>	<b>12</b>	<b>8</b> <sup>(4)</sup>	<b>12</b> <sup>(5)</sup>	<b>0</b>	<b>3</b> <sup>(1)</sup>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>37</b> <sup>(11)</sup>	<b>100%</b>	<b>100%</b>
Assistant Professor													
Zachary Burns	14	12	0	3	0	0	1	0	0	0	22	*	100%
Rebekah Dibble	11 <sup>(3)</sup>	1	2 <sup>(2)</sup>	2	0	0	1	0	0	0	11 <sup>(5)</sup>	*	100%
Keith Hunter	2	1 <sup>(1)</sup>	9 <sup>(6)</sup>	3 <sup>(3)</sup>	0	0	1 <sup>(1)</sup>	0	0	0	8 <sup>(3)</sup>	*	100%
Eun Kyung Lee	20	0	0	3	0	1	3	0	0	0	13	*	100%
Kevin Lo	20 <sup>(7)</sup>	0	9 <sup>(3)</sup>	6 <sup>(2)</sup>	0	1 <sup>(1)</sup>	3 <sup>(1)</sup>	0	0	0	19 <sup>(6)</sup>	*	100%
Matthew Monnot	16	0	0	4	0	0	5	0	0	0	7	*	100%
Neil Walshe	8	0	7	3	0	0	0	0	0	0	12	*	100%
<b>Total Assistant Professor</b>	<b>91</b> <sup>(10)</sup>	<b>14</b> <sup>(1)</sup>	<b>27</b> <sup>(11)</sup>	<b>24</b> <sup>(5)</sup>	<b>0</b>	<b>2</b> <sup>(1)</sup>	<b>14</b> <sup>(2)</sup>	<b>0</b>	<b>0</b>	<b>0</b>	<b>92</b> <sup>(14)</sup>	<b>100%</b>	<b>100%</b>
Adjunct Faculty													
Jacqueline Alcalde	0	0	0	0	0	0	0	0	0	0	0		33%
Elie Asmar	0	0	0	0	0	0	0	0	0	0	0	*	33%
Paul Axelrod	0	0	0	0	0	0	0	0	0	0	0		33%
Loni Davis	2	0	0	1	0	0	0	0	0	0	1	*	33%
RoJean DeChantal	0	0	0	0	0	0	0	0	0	0	0		25%
Peter DiGiammarino	0	0	0	0	0	0	0	0	0	0	0		0%
Steven Feinberg	0	0	0	0	0	0	0	0	0	0	0		16%
Suzanne Garrett	0	0	0	0	0	0	0	0	0	0	0		0%
Patrick Harper	0	0	0	0	0	0	0	0	0	0	0		66%
Nicole Jackson	2	0	6	0	0	0	1	0	0	0	7		22%
Ali Liaqat	0	0	0	0	0	0	0	0	0	0	0		25%
Marla Lowenthal	0	0	0	0	0	0	0	0	0	0	0	*	33%

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Amy Martin	0	0	0	0	0	0	0	0	0	0	0	*	33%
Stephanie Martin	0	0	0	0	0	0	0	0	0	0	0		25%
Barrett McBride	0	0	1	0	0	0	0	0	0	0	1	*	66%
Keith Merron	0	0	0	0	0	0	0	0	0	0	0		17%
Bradley Morrison	0	0	0	0	0	0	0	0	0	0	0	*	66%
Craig Nathanson	0	0	4	0	0	0	0	0	0	0	4	*	66%
Daniel Newark	0	0	0	0	0	0	0	0	0	0	0		33%
Rene Scudder	0	0	0	0	0	0	0	0	0	0	0		33%
Todd Slingsby	0	0	1	0	0	0	0	0	0	0	1		17%
Lisa Terry	0	7	1	0	0	0	0	0	0	0	8		33%
Mary Wardell	0	0	0	0	0	0	0	0	0	0	0		49.8%
Jacquelyn de l'Eau	0	0	0	0	0	0	0	0	0	0	0		66%
<b>Total Adjunct Faculty</b>	4	7	13	1	0	0	1	0	0	0	22	42.86%	28.77%
<b>Term Assistant Professor</b>													
Edward Kass	2	1	0	0	0	0	0	0	0	0	3	*	100%
Paul Ryder	0	1 <sup>(1)</sup>	5	0	0	0	1	0	0	0	5 <sup>(1)</sup>	*	100%
<b>Total Term Assistant Professor</b>	2	2 <sup>(1)</sup>	5	0	0	0	1	0	0	0	8 <sup>(1)</sup>	100%	100%
<b>Total Organization, Leadership, and Communication</b>	130 <sup>(24)</sup>	38 <sup>(2)</sup>	72 <sup>(19)</sup>	41 <sup>(12)</sup>	0	6 <sup>(2)</sup>	16 <sup>(2)</sup>	0	0	0	177 <sup>(29)</sup>	80%	72.37%

<b>Public and Nonprofit Administration</b>													
<b>Professor</b>													
Larry Brewster	13	6	0	3	0	2	0	0	0	0	14	*	100%
Marco Tavanti	42 <sup>(2)</sup>	9 <sup>(1)</sup>	6	9 <sup>(1)</sup>	0	0	4 <sup>(2)</sup>	0	0	0	44	*	100%
<b>Total Professor</b>	55 <sup>(2)</sup>	15 <sup>(1)</sup>	6	12 <sup>(1)</sup>	0	2	4 <sup>(2)</sup>	0	0	0	58	100%	100%
<b>Associate Professor</b>													
Richard Callahan <sup>15</sup>	45	25	28	3	0	0	13	0	0	0	82	*	100%
Kimberly Connor	19	13 <sup>(1)</sup>	11 <sup>(1)</sup>	4	0	0	4	0	0	0	35 <sup>(2)</sup>	*	100%
Ronald Harris	13	9	2 <sup>(2)</sup>	5 <sup>(1)</sup>	0	0	3	0	0	0	16 <sup>(1)</sup>	*	100%
Catherine Horiuchi	8	1	2	1	0	0	0	0	0	0	10	*	100%
Richard Waters	48 <sup>(2)</sup>	33 <sup>(1)</sup>	22 <sup>(1)</sup>	51 <sup>(2)</sup>	0	0	4	0	0	0	48 <sup>(2)</sup>	*	100%
<b>Total Associate Professor</b>	133 <sup>(2)</sup>	81 <sup>(2)</sup>	65 <sup>(4)</sup>	64 <sup>(3)</sup>	0	0	24	0	0	0	191 <sup>(5)</sup>	100%	100%
<b>Adjunct Faculty</b>													
PK Agarwal	0	0	0	0	0	0	0	0	0	0	0		17%
Roberto Blain	0	0	0	0	0	0	0	0	0	0	0		33%

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Shannon Calder	0	1	0	0	0	0	0	0	0	0	1		0%
Mary Churchill	2	0	0	1	0	0	0	0	0	0	1		33%
Lyn Corbett	0	0	0	0	0	0	0	0	0	0	0		33%
Sheldon Engler	0	0	0	0	0	0	0	0	0	0	0		25%
Tim Gaffaney	0	0	0	0	0	0	0	0	0	0	0		20%
Francisco Gamez	0	0	0	0	0	0	0	0	0	0	0	*	100%
Mary Katherine Garlick	0	0	0	0	0	0	0	0	0	0	0		33%
Joshua Glasgow	3	0	0	0	0	0	0	0	0	0	3		33%
Kenneth Goldstein <sup>16</sup>	13	1	0	5	0	0	0	0	0	0	9	*	33%
Michael Grimaldi	0	0	0	0	0	0	0	0	0	0	0		0%
Kevin Hickey	0	0	0	0	0	0	0	0	0	0	0	*	33%
John Himelright	0	0	0	0	0	0	0	0	0	0	0		33%
Donna Dan-Jing Hom	0	0	0	0	0	0	0	0	0	0	0		25%
Benjamin Jackson	1	0	0	0	0	0	0	0	0	0	1		33%
Adele James	0	0	1	0	0	0	0	0	0	0	1	*	25%
David Kersten	0	0	0	0	0	0	0	0	0	0	0		33%
Margret Kim	0	0	0	0	0	0	0	0	0	0	0	*	33%
Daniel Lawson	0	0	0	0	0	0	0	0	0	0	0		16%
Larry Liberty	0	0	0	0	0	0	0	0	0	0	0		25%
Timothy Loney	1	2	0	0	0	0	0	0	0	0	3	*	83.2%
Anthony Manzanetti	0	0	0	0	0	0	0	0	0	0	0		20%
Katy Martin	1	0	0	0	0	0	0	0	0	0	1		33%
Carol Miller	0	1	0	0	0	0	0	0	0	0	1		20%
Katherine Naff	0	0	0	0	0	0	0	0	0	0	0		25%
Irine Onciano	0	0	0	0	0	0	0	0	0	0	0		33%
Christine Schachter	0	0	0	0	0	0	0	0	0	0	0		20%
Elizabeth Schaffer	2	0	0	0	0	0	0	0	0	0	2		17%
Beverly Schulz	0	0	0	0	0	0	0	0	0	0	0		0%
Bruce Smith	0	1	0	0	0	0	0	0	0	0	1		25%
JoAnne Speers	3	7	0	0	4	0	0	0	3	0	3	*	22%
Martha Stillman	0	0	0	0	0	0	0	0	0	0	0		0%
Sarah Stockton	0	0	0	0	0	0	0	0	0	0	0		0%
Lynn Thull	0	0	0	0	0	0	0	0	0	0	0		25%
Robert Toone	0	0	0	0	0	0	0	0	0	0	0		25%
Peter Wright	0	0	0	0	0	0	0	0	0	0	0		50%

<b>Total Adjunct Faculty</b>	26	13	1	6	4	0	0	0	3	0	27	57.14%	35.22%
<b>Term Assistant Professor</b>													
Anthony Ribera	0	5	0	0	0	0	0	0	0	0	5	*	100%
<b>Total Term Assistant Professor</b>	0	5	0	0	0	0	0	0	0	0	5	100%	100%
<b>Total Public and Nonprofit Administration</b>	214 <sup>(4)</sup>	114 <sup>(3)</sup>	72 <sup>(4)</sup>	82 <sup>(4)</sup>	4	2	28 <sup>(2)</sup>	0	3	0	281 <sup>(5)</sup>	80%	63.79%

<b>SOM Staff</b>													
<b>Staff</b>													
Patricia Kwok	0	0	0	0	0	0	0	0	0	0	0		0%
<b>Total Staff</b>	0	0	0	0	0	0	0	0	0	0	0		0%
<b>Total SOM Staff</b>	0	0	0	0	0	0	0	0	0	0	0		0%

	Portfolio of Intellectual Contributions			Types of Intellectual Contributions								Percentages of Faculty producing ICs	
	Basic or Discovery Scholarship	Applied or Integration/Application Scholarship	Teaching and Learning Scholarship	Peer-Reviewed Journals	Research Monographs	Academic/Professional Meeting Proceedings	Competitive Research Awards Received	Textbooks	Cases	Other Teaching Materials	Other IC Type Selected by the School	Percentage of Participating Faculty Producing ICs	Percentage of Total FTE Faculty Producing ICs
<b>Faculty</b> Aggregate and summarize data to reflect the organizational structure of the school's faculty (e.g. departments, research groups). Do not list by individual faculty member.													
<b>Grand Total</b>	984 <sup>(122)</sup>	540 <sup>(47)</sup>	370 <sup>(72)</sup>	368 <sup>(78)</sup>	31	123 <sup>(28)</sup>	87 <sup>(7)</sup>	4	14 <sup>(5)</sup>	0	1267 <sup>(123)</sup>	80.67%	71.27%

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**AY 2014/2015 Tables 15-1 & 15-2**

AACSB Table 15-1: FACULTY SUFFICIENCY AND QUALIFICATIONS SUMMARY FOR THE MOST RECENTLY COMPLETED NORMAL  
ACADEMIC YEAR USING COURSES TAUGHT (RE: Standards 5 and 15)

Date Range: September 1, 2014 - August 31, 2015

Faculty Portfolio			Faculty Sufficiency		Percent of Time Devoted to Mission for Each Faculty Qualification Group				
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)
Total Accounting			37	29	553.0 (48.5%)	120.0 (10.5%)	20.0 (1.8%)	315.0 (27.6%)	133.0 (11.7%)
			>= 60% requirement for P for AACSB not met (56.1%)		Minimum SA: >= 40% requirement for AACSB met (48.5%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (60.7%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (88.3%)				
Total Business Analytics and Information Systems			58	26	1074.0 (56.2%)	474.0 (24.8%)	33.0 (1.7%)	298.0 (15.6%)	33.0 (1.7%)
			>= 60% requirement for P for AACSB met (69.0%)		Minimum SA: >= 40% requirement for AACSB met (56.2%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (82.7%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (98.3%)				
Total Economics, Law, and International Business			30	15	349.0 (36.9%)	133.0 (14.1%)	0.0 (0.0%)	198.0 (20.9%)	266.0 (28.1%)
			>= 60% requirement for P for AACSB met (66.7%)		Minimum SA: >= 40% requirement for AACSB not met (36.9%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (51.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (71.9%)				
Total Entrepreneurship, Innovation, and Strategy			57	25	700.0 (45.7%)	200.0 (13.0%)	66.0 (4.3%)	434.0 (28.3%)	133.0 (8.7%)
			>= 60% requirement for P for AACSB met (69.5%)		Minimum SA: >= 40% requirement for AACSB met (45.7%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (63.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (91.3%)				
Total Finance			97	37	967.0 (53.9%)	20.0 (1.1%)	73.0 (4.1%)	448.0 (25.0%)	286.0 (15.9%)
			>= 60% requirement for P for AACSB met (72.4%)		Minimum SA: >= 40% requirement for AACSB met (53.9%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (59.1%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (84.1%)				
Total Hospitality Management			27	0	300.0 (47.4%)	0.0 (0.0%)	0.0 (0.0%)	333.0 (52.6%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (100.0%)		Minimum SA: >= 40% requirement for AACSB met (47.4%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (47.4%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total Marketing			57	11	766.0 (68.5%)	0.0 (0.0%)	33.0 (3.0%)	219.0 (19.6%)	100.0 (8.9%)
			>= 60% requirement for P for AACSB met (83.8%)		Minimum SA: >= 40% requirement for AACSB met (68.5%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (71.5%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (91.1%)				
Total Organization, Leadership, and Communication			69	18	1198.0 (65.5%)	50.0 (2.7%)	33.0 (1.8%)	447.0 (24.5%)	100.0 (5.5%)
			>= 60% requirement for P for AACSB met (79.3%)		Minimum SA: >= 40% requirement for AACSB met (65.5%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (70.1%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (94.5%)				
Total Public and Nonprofit Administration			8	5	758.0 (43.8%)	228.0 (13.2%)	222.0 (12.8%)	405.0 (23.4%)	119.0 (6.9%)
			>= 60% requirement for P for AACSB met (61.5%)		Minimum SA: >= 40% requirement for AACSB met (43.8%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (69.7%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.1%)				
Grand Total			440	166	6665.0 (52.7%)	1225.0 (9.7%)	480.0 (3.8%)	3097.0 (24.5%)	1170.0 (9.3%)
			>= 75% requirement for P for AACSB not met (72.6%)		Minimum SA: >= 40% requirement for AACSB met (52.7%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (66.2%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (90.7%)				
Faculty Sufficiency Indicators: <ul style="list-style-type: none"><li>Overall: P/(P+S) &gt;= 75%</li><li>By discipline, location, delivery mode, or program: P/(P+S) &gt;= 60%</li></ul>					Faculty Qualification Indicators: <ul style="list-style-type: none"><li>Minimum SA: (SA)/(SA + PA + SP + IP + O) &gt;= 40%</li><li>Minimum SA + PA + SP: (SA + PA + SP)/(SA + PA + SP + IP + O) &gt;= 60%</li><li>Minimum SA + PA + SP + IP: (SA + PA + SP + IP)/(SA + PA + SP + IP + O) &gt;= 90%</li></ul>				

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**AACSB Table 15-1: FACULTY SUFFICIENCY AND QUALIFICATIONS SUMMARY FOR THE MOST RECENTLY COMPLETED NORMAL  
ACADEMIC YEAR USING COURSES TAUGHT (RE: Standards 5 and 15)  
Date Range: September 1, 2014 - August 31, 2015**

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Accounting: Professor											
Diane Roberts	September 10, 1985	Ph D, 1995	7		UT, MT, RES and SER	100.0					3+ PRJs in past 5 years.
Accounting: Associate Professor											
Carol Graham	August 15, 1998	Ph D, 1995	5		UT, RES and SER	100.0					PhD, Accounting Dept. Chair, Accounting, 2013-present
John Koeplin	September 1, 1985	Ph D, 1998	2		UT, RES and SER		100.0				8/2011-present, Rector, Loyola House Jesuit Community 8/2011-present, BoT, USF 8/2010-presnt, BoT, SCU
Todd Sayre	August 24, 1998	Ph D, 1994	4		UT, RES and SER	100.0					2 PRJs in past 5 years. 4+ Conference presentations.
Accounting: Assistant Professor											
Fernando Comiran	August 15, 2014	Ph D, 2014	4		UT, RES and SER	100.0					PhD, Business Administration, 2014.
Tatiana Fedyk	August 15, 2013	Ph D, 2008	4		UT, RES and SER					100.0	PhD, Accounting, 2008
Joohyung Ha	August 15, 2014	Ph D, 2011	4		UT, RES and SER	100.0					PhD, Accounting, 2011
Accounting: Adjunct Faculty											
George DeVries	July 2013	MBA, 1999		7	UT				66.0		2013- present, Socorro Medical, San Francisco, CA, Chief Financial Officer
Lynn Henley	January 2015	MS, 1900		1	UT				17.0		11/2011 - present, Tax Partner, Armanino, LLP

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Maleeha Khan	August 2013	MBA, 2013		5	UT				33.0		8/2009- present, Laurels Medical Services DBA Chariot, Sacramento, California, Business Analyst
Barbara Lougee <sup>1</sup>				1	MT	20.0					3+ PRJs in past 5 years.
Dawn Mayer		LLM, 2007		2	UT		20.0				2011-present, Tax Manager, University of San Francisco
Masooma Mir	January 2015	MBA, 2008		1	UT				33.0		2/2013-present, Laurels Medical Services, Vice-President
John O'Shaughnessy	August 2010	Ph D, 1990		1	UT	33.0					7+ PRJs in past 5 years.
Zola Rodgers	August 2014	BS, 2004		2	UT				33.0		11/2014-present, Director of Accounting, Cost Plus World Market
Wesley Selke	May 2014	MBA, 2007		2	MT				33.0		12/2010-present, Better Ventures/Hub Ventures, Co-Founder and Managing Director. CFA
Kathryn Troxel				1	UT			20.0			2012-present, Tax and Accounting Manager, McKesson Corp., San Francisco, CA Certified Public Accountant, licensed in both CA and WA
Jennifer Wells	1995	MBA, 1994		6	UT					33.0	MBA, 1994.
<b>Accounting: Term Instructor</b>											
Claudia Roehl	September 1, 2004	BS, 1986	7		UT, MT and SER				100.0		Academic Director for MBA program(s)
<b>Total Accounting</b>			37	29		553.0 (48.5%)	120.0 (10.5%)	20.0 (1.8%)	315.0 (27.6%)	133.0 (11.7%)	
			>= 60% requirement for P for AACSB not met (56.1%)			Minimum SA: >= 40% requirement for AACSB met (48.5%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (60.7%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (88.3%)					

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Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Business Analytics and Information Systems: Professor											
Steven Alter	September 1, 1987	Ph D, 1975	2		UT, RES and SER	100.0					5+ PRJs in past 5 years.
Thomas Grossman	August 15, 2003	Ph D, 1994	4		MT, RES and SER		100.0				1 PRJ in past 5 years. 2011-2013, Associate Dean
Stephen Huxley	September 1, 1973	Ph D, 1975	6		UT, MT, RES and SER		100.0				2009-present, Chief Investment Strategist, Asset Dedication LLC.
Paul Lorton Jr	September 1, 1973	Ph D, 1973	7		UT, RES and SER	100.0					3 PRJs in past 5 years.
Vijay Mehrotra	August 1, 2009	Ph D, 1992	6		MT, RES and SER	100.0					5+ PRJs in past 5 years.
Joel Oberstone	September 1, 1986	Ph D, 1972	2		UT, RES and SER	100.0					3+ PRJs in past 5 years.
Business Analytics and Information Systems: Associate Professor											
Jeff Hamrick <sup>2</sup>	September 1, 2012	Ph D, 2009	0		MT, ADM, RES and SER	100.0					3+ PRJs in past 5 years.
Business Analytics and Information Systems: Assistant Professor											
Matthew Dixon <sup>3</sup>	August 15, 2014	Ph D, 2007	3		MT, RES and SER	100.0					2+ PRJS in past 5 years. 2+ conference proceedings.
Sophie Engle <sup>4</sup>	July 2010	Ph D, 2010	0		MT, RES and SER	100.0					PhD, 2010 3+ proceedings in Computer Science/Data Visualization in past 5 years.
Moirra Gunn	February 5, 1979	Ph D, 1974	4		MT, RES and SER	100.0					2+ PRJs in past 5 years 8+ presentations.
Nicholas Ross <sup>5</sup>	January 2014	Ph D, 2012	0		UT and MT				17.0		Ph.D., 2012, Accounting
Cynthia Thompson <sup>6</sup>	June 2013	Ph D, 1998	0		MT and SER		100.0				7/2010-present, DeLoitte Analytics Solution Group, DeLoitte LLP
Business Analytics and Information Systems: Adjunct Faculty											



Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Ornella Bonamassa	June 2013	Ph D, 1995		4	UT				33.0		Circle Bee Farm, Founder
Michael Brzustowicz <sup>7</sup>	October 17, 2013	Ph D, 2001		0	MT		16.0				PhD, Medical Biophysics, 2001 2012-present, Data Scientist at Kontagent
Helmut Buehler <sup>8</sup>	May 1996	EDD		0	MT		25.0				2013-present, Principal Consultant, Management Consulting EdD, 2005
Donald Danner	August 2013	M.S.B.A., 1995		5	UT and MT				33.0		1996-present, SFSU Faculty 2005-2010, UCSF consultant
Daryoush Farsi	August 2001	Ph D, 1990		4	MT					33.0	2010-present, DDF Financial Consultant & Property Management
Mary Holcomb	January 2015	Ph D, 1992		1	MT	25.0					4+ PRJs in last 5 yrs
Yannet Interian <sup>9</sup>	November 15, 2012	Ph D, 2006		0	MT	33.0					2 PRJs in past 5 years 1 Conference proceeding in past 5 years.
Paul Intrevado	August 15, 2014	Ph D, 2015	2		UT, MT, RES and SER	100.0					PhD., 2015
Payson Johnston	May 2013	MBA, 2007		3	UT and MT				66.0		2014-present, CEO & co-founder, Agora Intelligence, Inc.
Velitchka Kaltcheva <sup>10</sup>	May 22, 2014	Ph D, 2001		1	MT	16.0					3+ PRJs in past 5 years
Vera Klimkovskaia	August 2008	MA, 2006		2	UT				33.0		2006-present, Lecturer, SFSU
William Kolb	August 1993	MS, 1985	2		UT and MT				25.0		2011-present, Independent Consultant. 2004-present, Managing Consultant, IP International, San Mateo, CA
Edward Kreutzer	August 2003	MBA, 2002		1	MT				58.0		11/2012-present, Hadoop Team, Sr. Database Developer/Engineer

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Steven Lopez <sup>11</sup>	May 1997	EDD, 2009		0	MT		25.0				2004-present, Independent Consultant EdD, Transformational Leadership Internet Security, E-Commerce.
Marco Massenzio <sup>12</sup>	March 25, 2015	Ph D, 1998		0	MT		8.0				2013-present, VP Engineering and Chief Architect, RiverMeadow Software, San Jose, CA.
Nola Masterson		Ph D, 1975		1	MT			33.0			1983-present, Managing Director, Science Futures Management Co. LLC 1+ PRJs in past 5 years.
John Sander	June 2011	JD, 2011		4	UT				33.0		3/2014-present, Senior Analyst, Xtime, Redwood Shores, CA
Business Analytics and Information Systems: Term Associate Professor											
Stephen Morris	January 7, 1991	EDD, 2010	8		UT, MT, RES and SER		100.0				EdD, December, 2010 PA based on appendix D.
Mouwafac Sidaoui	September 1, 1996	EDD, 2007	12		UT, MT, RES and SER	100.0					AACSB, Bridge to Business Program , 2011
Total Business Analytics and Information Systems			58	26		1074.0 (56.2%)	474.0 (24.8%)	33.0 (1.7%)	298.0 (15.6%)	33.0 (1.7%)	
			>= 60% requirement for P for AACSB met (69.0%)		Minimum SA: >= 40% requirement for AACSB met (56.2%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (82.7%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (98.3%)						
Economics, Law, and International Business: Professor											
W Becker	August 15, 1975	Ph D, 1975	5		UT, RES and SER		100.0				JD Pro-bono work, Alameda & Contra Costa Bar Associations

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Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Daniel Blakley	August 15, 1981	Ph D, 1981	7		UT, MT and SER					100.0	
Karl Boedecker	August 15, 1976	Ph D, 1974	2		UT, MT, RES and SER	100.0					2+ PRJs in past 5 years 10+ presentations
James Shaw	August 27, 1982	Ph D, 1980	8		UT, MT and SER					100.0	Does not fall into any qualification categories.
Xiaohua Yang	May 1, 2009	Ph D, 1996	2		UT, MT, RES and SER	100.0					8+ PRJs in past 5 years.
<b>Economics, Law, and International Business: Associate Professor</b>											
Richard Johnson III <sup>13</sup>	August 1, 2011	DPA, 1994	1		UT, MT, RES and SER	100.0					7+ PRJs in past 5 years.
Lydie Pierre-Louis	2012	JD, 1996				0.0					
<b>Economics, Law, and International Business: Adjunct Faculty</b>											
Ronald Babin <sup>14</sup>	August 2014			1	MT	25.0					DBA, 2011 4+ PRJs in past 5 years.
Robert Derbin	January 2015			1	UT					33.0	2013-present, Principal Data Management Analyst, UCSF
Reza Dibadj <sup>15</sup>		JD, 1997		1	MT	24.0					3+ PRJs in last 5 years
Vivian Faustino-Pulliam	January 2009	MBA, 2004		4	UT				66.0		12/2013-present, Program Development, Asian Women's Shelter
Steven Fichera	January 2008	JD, 1999		4	UT				66.0		10/2011-present, Raj Abhyanker P.C., Trademark, Copyright and Corporate Law
David Griffis	August 2004	JD, 1992	5		UT and SER				66.0		1992-present, Litigation Partner, Reid, Axelrod, McCormack & Griffis
Michael Lehmann	January 1982	Ph D, 1969		2	UT					33.0	Does not fall into any qualification categories.
Alan Spector	August 2014	JD, 1985		2	UT		33.0				JD, 1985 2007-present, Consultant,

Faculty Portfolio			Faculty Sufficiency			Percent of Time Devoted to Mission for Each Faculty Qualification Group						Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Normal Professional Responsibilities	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)		
											Resources Global Professionals, San Francisco, CA.	
Total Economics, Law, and International Business			30	15		349.0 (36.9%)	133.0 (14.1%)	0.0 (0.0%)	198.0 (20.9%)	266.0 (28.1%)		
			>= 60% requirement for P for AACSB met (66.7%)		Minimum SA: >= 40% requirement for AACSB not met (36.9%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (51.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (71.9%)							
Entrepreneurship, Innovation, and Strategy: Professor												
Jonathan Allen	September 1, 2003	Ph D, 1995	4		UT, RES and SER	100.0					6+ PRJs in past 5 years.	
David Batstone	August 15, 1994	Ph D, 1989	4		UT, MT, RES and SER		100.0				Not for Sale campaign Co-founder & Managing Partner, Just Business	
Mark Cannice	August 15, 1996	Ph D, 1997	3		UT, RES, ED and SER	100.0					4+ PRJs in past 5 years.	
Roger (Rongxin) Chen	August 15, 1995	Ph D, 1996	6		MT, RES, ED and SER	100.0					3+ PRJs in past 5 years.	
Entrepreneurship, Innovation, and Strategy: Associate Professor												
Sun-Young Park	August 1, 2010	Ph D, 2006	4		UT, RES and SER	100.0					10+ PRJs in past 5 years.	
Entrepreneurship, Innovation, and Strategy: Assistant Professor												
Monika Hudson	January 1, 2006	DM, 2007	7		UT, MT, RES and SER	100.0					3+ PRJS in past five years  Managing Principal, The MGT Group, Millbrae, CA, 1990-present	
Jennifer Walske	January 1, 2013	DBA, 2009	3		MT, RES, ED and SER	100.0					3+ PRJs in past 5 years.	
Liang Wang	September 1, 2011	Ph D, 2011	2		UT, MT, RES and SER	100.0					3+ PRJs in past 5 years.	
Entrepreneurship, Innovation, and Strategy: Adjunct Faculty												
Brett Bonthron	2003	MA, 1993		1	MT				17.0		2012-present, Director, Monitor Deloitte, San Francisco, CA	

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Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
David Epstein	August 2003	MBA, 1984		1	UT				33.0		6/2008-present, Epstein Advisors 6/2012-11/2013, Sol Voltaics
Goodarz Goodarzi			1		UT and MT				20.0		2013-2014, Product Manager, Stealth Mode Startup Company, San Francisco, CA.
Dan Himelstein	August 2010	MS, 1988		6	UT				66.0		2008-present, Your Local Playground, San Francisco, CA, Founder.
Eric Lacy				3	UT				33.0		2008-current, ecl-solutions, LLC, Managing Principal, Consulting.
James Lee				1	MT				33.0		2012-present, Managing Partner, Schaffer & Combs: strategic and tactical planning; fundraising training and execution; impact identification and measurement; messaging, communications, and online engagement; grantmaking and program management best practices; organizational design and executive recruitment; management support and executive coaching; family philanthropy, vision, mission, legacy, generational dynamics.

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Jonathan Littman	January 2013	BA, 1999		2	UT				33.0		2004-present, Snowball narrative
Luigi Lucaccini <sup>16</sup>	August 1983	Ph D, 1968		3	UT					33.0	
Patrick O'Regan Jr			3		UT				33.0		2006-present, Founder, Nobska Technologies, Inc., San Carlos, CA.
Susan Stryker	January 2014	MS, 1975		4	UT				66.0		2010-present, Stryker Technical, Berkeley, CA.
Entrepreneurship, Innovation, and Strategy: Term Assistant Professor											
Isabelle Lescent-Giles	August 2013	Ph D, 1992		4	UT			66.0			1/2007-present, The Winthrop Group (New York and San Francisco), USA, Senior consultant. 11/2012-present, Nomadic, Course advisor
Lan-Huong Nguyen	February 1, 2003	MBA, 1989	6		UT and SER				100.0		2005-present, International Business Developer, Advisor to start-ups
Entrepreneurship, Innovation, and Strategy: Term Associate Professor											
Laurie MacPherson	January 1, 1993	DM, 2002	7		MT and SER		100.0				2003-2011, Encore Consultants, LLC.
Entrepreneurship, Innovation, and Strategy: Term Instructor											
Gleb Nikitenko <sup>17</sup>	January 15, 2014	EDD, 2009	7		UT and SER					100.0	
Total Entrepreneurship, Innovation, and Strategy			57	25		700.0 (45.7%)	200.0 (13.0%)	66.0 (4.3%)	434.0 (28.3%)	133.0 (8.7%)	
			>= 60% requirement for P for AACSB met (69.5%)			Minimum SA: >= 40% requirement for AACSB met (45.7%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (63.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (91.3%)					
Finance: Professor											
Barry Doyle	August 15, 1984	Ph D, 1985	1		MT, ADM, RES and SER	100.0					2+ PRJs in past 5 years. 3+ conference proceedings
Robert Mefford	September 1, 1979	Ph D, 1983	6		UT, MT, RES and SER	100.0					5+ PRJs in past 5 years.

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Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Manuel Tarrazo	September 1, 1988	Ph D, 1993	5		UT, RES and SER	100.0					5+ PRJs in past 5 years.
Nicholas Tay	September 1, 1998	Ph D, 1998	2		UT, MT, RES and SER	100.0					6+ PRJs in past 5 years.
John Veitch	September 1, 1992	Ph D, 1985	5		MT, RES and SER	100.0					AACSB Bridge 2015
<b>Finance: Associate Professor</b>											
Ludwig Chincarini	August 15, 2012	Ph D, 1995	11		MT, RES, ED and SER	100.0					7+ PRJs in past 5 years.
Cathy Goldberg	January 15, 2001	Ph D, 2001	5		UT, RES and SER					100.0	
Man-Lui Lau <sup>18</sup>	September 1, 1992	Ph D, 1986		9	MT and SER					33.0	
<b>Finance: Assistant Professor</b>											
Xiaoya Ding	August 15, 2011	Ph D, 2011	2		UT, RES and SER	100.0					PhD., 2011
<b>Finance: Adjunct Faculty</b>											
Satish Ananthaswamy	August 2006	MBA, 1992	5		MT				66.0		1998-Present: Director and Sr. Portfolio Manager, Bond Portfolio Management, Board of Regents, Office of the CIO, University of California, Oakland, CA
Brent Burns	January 2013	MBA, 2000		5	UT and MT				66.0		Asset Dedication, LLC President and Co-Founder 2002-Present
Peter Chau	August 2004	1976		1	MT				17.0		2002-Present, Financial Derivatives Consultant 2009-present, www.BondMath101.com, Founder & President.
Patrick Collins	January 2005	Ph D, 1900		1	MT					20.0	1 PRJ in past 5 years.
J. Brad Craig	January 2007	BA, 1977		1	MT				17.0		2006- present, Senior Investment

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											Manager, The Private Bank of Wells Fargo
George Devine	January 1986	MA, 1964		1	UT				33.0		active and licensed real estate broker.
April Elam	May 2015	MA, 2007		1	MT				16.0		MA, Financial Economics 2013-present, Manager of Investments, Jewish Community Federation & Endowment Fund, San Francisco, CA.
Yuri Fedyk		Ph D, 2009	6		UT			20.0			1 PRJ in past 5 years 2011-2012, Joint Stock Company "PromActive", Moscow, Russia, founder
Nabanita Ghosh				3	UT					33.0	
John Green	January 1992	JD, 1969	4		UT and SER				66.0		Consultant, 2010-Present
Kirsten Hilbert <sup>19</sup>	August 2011			0	MT					0.0	Does not fall in to any qualification category.
Simone Hoelck		MA, 2005								0.0	
Damon Krytzer				2	MT				16.0		MBA, 2008. 2014-present, Managing Director, Greywolf Capital Management, San Francisco, CA.
Richard Libby				2	MT		20.0				2010-present, Founding Director, Perihelion Capital Advisors, San Francisco, CA.
Michael Maestas	January 2012	MBA, 1997	4		MT			33.0			2004 – Present, Avalon Global Asset Management, San Francisco, CA, Senior Analyst and Chief Compliance Officer



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											2007 – Present, CFA San Francisco: Instructor for CFA review courses in Financial Statement Analysis for Levels I & II.
Jonathan Mandle				1	MT			20.0			2010-present, Corrum Capital/Stamos Capital – Founding Partner/Partner. CFA Charter Holder
Michael Pastena	January 2013	BBA, 1964	3		UT				33.0		MCP Services - New York, New York - Founder 2005-Present, Corporate Training, Consulting, Coaching and Tutoring Organization
Jonathan Rico				2	UT				20.0		2015-present, Business Banking Underwriter Meriwest Credit Union, San Jose, CA.
Andrew Shamiya				1	MT				20.0		2014-present, Market Analytics Consultant, High-Tech Practice, Gartner, Inc., San Francisco, CA
Mark Sherman		MBA, 1998		3	MT				25.0		1999-present, Principal, Van Strum & Towne, Inc., San Francisco, CA.
Lawrence Souza		DBA, 2014		2	UT	33.0					2014 - DBA- Doctor of Business Administration, Corporate Finance/Real Estate Management.
Torben Voetmann	January 2013	Ph D, 2000		1	MT	17.0					2 PRJs + 2 additional

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											publications in past 5 years. PhD, Finance, 2000.
Loren Walden	August 2003	BA	4		MT				33.0		1999 to Present Founding Partner, Blue Oak Capital, LLC
Christopher Winiarz				1	MT				20.0		2012-present, Investment Officer of Public Equities, The Regents of the University of California, Oakland, CA.
Man Chiu Wong <sup>20</sup>	January 2008	Ph D, 2002	4		MT, RES and SER	17.0					12+ PRJs in past 5 years. Ph.D., Economics, 2002
Finance: Term Assistant Professor											
John Gonzales	August 15, 1996	Ph D, 1983	16		UT, MT, RES and SER	100.0					AACSB Bridge, 2013
Finance: Term Associate Professor											
Frank Ohara	February 9, 1987	JD, 1991	14		UT, MT, RES and SER	100.0					AACSB, Bridge to Business Program , 2011
Kashi Tiwari	August 15, 2015	Ph D, 1981			UT					100.0	
Total Finance			97	37		967.0 (53.9%)	20.0 (1.1%)	73.0 (4.1%)	448.0 (25.0%)	286.0 (15.9%)	
			>= 60% requirement for P for AACSB met (72.4%)			Minimum SA: >= 40% requirement for AACSB met (53.9%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (59.1%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (84.1%)					
Hospitality Management: Associate Professor											
Michael Collins	August 15, 2013	Ph D, 2007	4		UT, RES and SER	100.0					4+ PRJs in past 5 years.
Thomas Maier	August 15, 2014	Ph D, 2008	7		UT, MT, RES and SER	100.0					10+ PRJs in past 5 years.
Hospitality Management: Assistant Professor											
Michelle Millar	June 1, 2010	Ph D, 2009	6		UT, RES and SER	100.0					8+ PRJs in past 5 years.
Hospitality Management: Adjunct Faculty											

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Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Normal Professional Responsibilities	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)		
Kathy Odsather	January 2008	BA, 1975	3		UT and SER				100.0		2003-present, Associate Director, Hospitality Management	
Jeffrey Scharosch	August 2013	MA, 1997	1		UT				33.0		1994-present, General Manager, Spinnaker Restaurant, Sausalito, CA	
Hospitality Management: Term Instructor												
Jean-Marc Fullsack	February 1, 1997	Certificat d'aptitude professionnelle (CAP) Diplome, 1972	5		UT and SER				100.0		1997-present, Executive Chef Instructor	
Hospitality Management: Term Professor												
David Jones	January 2013	Ph D, 2000	1		UT, MT and ADM				100.0			
Total Hospitality Management			27	0		300.0 (47.4%)	0.0 (0.0%)	0.0 (0.0%)	333.0 (52.6%)	0.0 (0.0%)		
			>= 60% requirement for P for AACSB met (100.0%)			Minimum SA: >= 40% requirement for AACSB met (47.4%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (47.4%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)						
Marketing: Professor												
Leslie Goldgehn	February 1, 1986	Ph D, 1982	5		UT, MT, RES and SER	100.0					3+ PRJs in past 5 years	
Nicholas Imparato	September 1, 1970	Ph D, 1970	3		UT, RES and SER	100.0					2+ PRJs in past 5 years 2+ presentations in past 5 years.	
Marketing: Associate Professor												
Jonathan Barsky	September 1, 1985	Ph D, 1991	5		UT, MT, RES and SER	100.0					3 PRJs in past 5 years.	
Shenzhao Fu	August 15, 1989	Ph D, 1989	5		UT and SER					100.0	Does not fall into any qualification categories.	
Anthony Patino	August 15, 2013	Ph D, 2006	11		UT, MT, RES and SER	100.0					11+ PRJs in past 5 years.	
Sweta Thota	September 1, 2008	Ph D, 2004	4		UT, RES and SER	100.0					5+ PRJs in past 5 years	
Ricardo Villarreal	February 1, 2009	Ph D, 2004	7		UT, MT, RES and SER	100.0					3+ PRJs in past 5 years.	

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Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Marketing: Assistant Professor											
Sonja Poole	September 1, 2008	Ph D, 2007	5		UT, RES and SER	100.0					3+ PRJs in past 5 years. 6+ Conference Proceedings
Marketing: Adjunct Faculty											
John Durham	January 1994	MA, 1974	1		UT and MT				33.0		2007-present, CEO & Managing Partner, Catalyst S+F, New York, NY & San Francisco, CA.
Robert Koran	May 1990	MBA		2	UT				20.0		1992-present, Principal, RJK & ASSOCIATES, Redwood City, CA.
Stanley Kwong	November 1, 2009	MS	4		UT and SER				33.0		2009-present, ChinaSF, Strategic Advisor and Executive Committee member 2009-present, Bay Area Council, Strategic Advisor
Mohammed Nadeem				2	UT	66.0					Ph.D. e-Business. 3+ PRJs in past 5 years.
Linda Saytes	August 2006	MBA, 1900		4	UT				33.0		2000-present, Saytes Associates
Stephan Sorger	August 2013	MBA, 1992		3	MT			33.0			5/2009-present, Vice President, Strategic Marketing: On Demand Advisors
Marketing: Term Instructor											
John O'Meara	February 1, 2010	MBA, 1985	7		UT, MT and SER				100.0		2010-present, New Growth Consulting, LLC, Principle.
Total Marketing			57	11		766.0 (68.5%)	0.0 (0.0%)	33.0 (3.0%)	219.0 (19.6%)	100.0 (8.9%)	
			>= 60% requirement for P for AACSB met (83.8%)			Minimum SA: >= 40% requirement for AACSB met (68.5%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (71.5%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (91.1%)					
Organization, Leadership, and Communication: Professor											

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Kathleen Kane	September 1, 1991	Ph D, 1992	8		MT, RES and SER	100.0					5+ PRJs in past 5 years
Organization, Leadership, and Communication: Associate Professor											
Linda Henderson	April 1, 2002	Ph D, 1985	2		UT, MT, RES and SER	100.0					2+ PRJs in past 5 years 1 conference presentation
Jennifer Parlamis	September 1, 2007	Ph D, 2001	3		MT, RES and SER	100.0					5+ PRJs in past 5 years.
Richard Stackman	September 1, 2003	Ph D, 1995	1		MT, ADM, RES, ED and SER	100.0					3+ PRJs in past 5 years 4+ Presentations.
Organization, Leadership, and Communication: Assistant Professor											
Rebekah Dibble	August 15, 2011	Ph D, 2010	2		UT, MT and RES	100.0					2+ PRJs in past 5 years. 1 book chapter. 3+ conference presentations.
Keith Hunter	June 1, 2011	Ph D, 2011	3		UT, RES and SER	100.0					PhD. 2011.
Eun Kyung Lee	August 2014	Ph D, 2013	5		UT, RES and SER	100.0					PhD., 2013 3+ PRJs in past 5 years.
Kevin Lo	March 1, 2011	Ph D, 2007	4		UT, RES and SER	100.0					5+ PRJs in past 5 years.
Matthew Monnot	August 15, 2014	Ph D, 2008	4		UT, MT, RES and SER	100.0					3+ PRJs in past 5 years.
Neil Walshe	February 1, 2009	Ph D, 2010	5		MT, RES and SER	100.0					2+ PRJs in past 5 years. 12+ presentations.
Organization, Leadership, and Communication: Adjunct Faculty											
Jacqueline Alcalde				1	UT			33.0			MHROD, 1996. Founder, Evolutions Consulting Group, published book
RoJean DeChantal		MS, 1998		3	MT and SER				25.0		2008-present, Senior Consultant, Torchiana, Mastrov and Sapiro, San Francisco, CA
Amy Fraher										0.0	
Patrick Harper		MS, 2008		2	MT				66.0		2010-present, General Manager

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											Technology Order Fulfillment organization, Agilent Technologies/Hewlett Packard.
Maria Lowenthal	January 2008	EDD, 1997	3		UT and MT		33.0				2011-present, SHAPE (Sexual Harassment & Assault Prevention Education), San Mateo, CA. Executive Director
Amy Martin	January 2015	MA, 2007	2		UT				33.0		10/2014-present, Trainer, Managed Health Network
Stephanie Martin				2	MT				25.0		2013-present, Principal & Founder, Martin Communications, San Francisco, CA.
Barrett McBride	August 2010	Ph D, 2013	4		UT and MT	66.0					PhD. 2013
Keith Merron		EDD, 1985		1	MT		17.0				99-present, Founder and Managing Partner, Avista Consulting Group
Bradley Morrison		MA, 1991	2		UT and MT				66.0		1994-present, Morrison Forbes Consultants
Craig Nathanson	August 2013	Ph D, 2013	6		UT	66.0					PhD, 2013
Daniel Newark <sup>21</sup>		Ph D, 2014		0	MT	33.0					PhD, 2014 2+ PRJs in past 5 years
Rene Scudder	August 2013	BS, 2010		1	UT				33.0		2012, AACSB Prof. Qualified Bridge Program
Lisa Terry	May 2015			1	UT				33.0		MSOD, 2009. 2014-present, Interim Executive Director, Organizational Excellence, UC Davis.
Mary Wardell		EDD, 2008		2	MT	33.0					EdD., 2011,

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											SA for Organizational Leadership	
Jacquelyn de l'Eau	January 2014	MA, 1994		5	UT and MT				66.0		1997-present, Jacquelyn de l'Eau, Executive Consultant	
Organization, Leadership, and Communication: Term Assistant Professor												
Edward Kass	September 1, 2008	Ph D, 1999	8		UT, MT, RES and SER					100.0	Serves in a significant leadership position in a business, non-profit, or public-service organization related to the field in which the faculty member teaches.	
Paul Ryder	June 1, 2005	Ph D, 2009	7		UT, MT, ED and SER				100.0			
Total Organization, Leadership, and Communication			69	18		1198.0 (65.5%)	50.0 (2.7%)	33.0 (1.8%)	447.0 (24.5%)	100.0 (5.5%)		
			>= 60% requirement for P for AACSB met (79.3%)			Minimum SA: >= 40% requirement for AACSB met (65.5%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (70.1%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (94.5%)						
Public and Nonprofit Administration: Professor												
Larry Brewster <sup>22</sup>	August 15, 1999	Ph D, 1975	0		UT, MT and RES	100.0					4+ PRJs in past 5 years.	
Marco Tavanti <sup>23</sup>	August 15, 2014	Ph D, 2001	0		MT, RES and SER	100.0					15+ PRJs in past 5 years.	
Public and Nonprofit Administration: Associate Professor												
Richard Callahan <sup>24</sup>	August 15, 2011	DPA, 2002	0		MT, RES and SER	100.0					10+ PRJs in past 5 years	
Kimberly Connor	August 15, 2001	Ph D, 1991	1		UT, MT, RES and SER	100.0					5+ PRJs in past 5 years.	
Ronald Harris <sup>25</sup>	January 15, 2013	Ph D, 1996	0		MT, RES and SER	100.0					5+ PRJs in past 5 years	
Richard Waters <sup>26</sup>	September 1, 2011	Ph D, 2007	0		MT, RES and SER	100.0					50+ PRJs in past 5 years	
Public and Nonprofit Administration: Adjunct Faculty												
Roberto Blain <sup>27</sup>	January 2015	MA, 2010		0	UT and MT				33.0		7/13 – 5/14 – Director, Talent Acquisition, Sidra	

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											Medical and Research Center
Jeffrey Buhl <sup>28</sup>		MA, 2001		0	UT				33.0		
Mary Churchill <sup>29</sup>		Ph D, 1997		0	UT					33.0	1 PRJ in past 5 years.
Lyn Corbett <sup>30</sup>	January 2014	Master of Public Administration, 1997		0	MT				33.0		6/2012-present, The Pivotal Group Consultants, Inc., Sacramento, CA, President
Sheldon Engler <sup>31</sup>		Ph D, 1979		0	MT		25.0				PhD. Economics, 2013-present, Economic consultant.
Abrol Fairweather <sup>32</sup>	August 1998	Ph D, 2005		0	UT			33.0			2+ PRJs in past 5 years 2+ books
Tim Gaffaney				1	MT		20.0				2013-present, Senior Fellow, Sacramento Regional Technology Alliance (SARTA), Sacramento, CA
Francisco Gamez <sup>33</sup>	May 2012	EDD, 2010	0		UT, ADM and SER	100.0					EdD, 2010
Mary Katherine Garlick <sup>34</sup>	January 2008	Ph D, 2004		0	UT				33.0		2005-present, Instructor, Art Institute of California
Joshua Glasgow <sup>35</sup>	August 2008	Ph D, 2001		0	UT					33.0	Teaches INTD
Kenneth Goldstein <sup>36</sup>	August 2013	Ph D, 1996	0		MT and SER	33.0					5+ PRJs in past 5 years.
Kevin Hickey <sup>37</sup>	January 2008	MA, 2004	0		MT and SER				33.0		11/1999-present, Jewish Vocational Service, Senior manager, High School & Bridge Programs
John Himelright <sup>38</sup>	January 1995	Ph D, 1980		0	UT					33.0	
Donna Dan-Jing Hom <sup>39</sup>		MA, 2003		0	MT				25.0		2014-present, Interim Assistant City Administrator, City of Oakland, CA.



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Benjamin Jackson <sup>40</sup>	August 2012	MFA, 2006		0	UT			33.0			Published and poetry in past 5 years.
Adele James <sup>41</sup>	August 2013	MA	0		MT				25.0		6/2009-present, Adele James Consulting & Coaching, Sacramento, CA
David Kersten <sup>42</sup>	January 2014	MA, 2000		0	MT				33.0		2005-present, Kersten Communications, Sacramento, CA
Margret Kim	January 2013	JD, 1988	2		MT and SER		33.0				8/2011-present, Air Resources Board, Senior Staff Counsel, Sacramento, CA.
Daniel Lawson	January 2015	Ph D, 2007		1	UT and SER				16.0		2003-present, Senior Director of Public Safety, University of San Francisco.
Larry Liberty				1	MT		25.0				PhD. Organizational Behavior & Leadership 1985 - Present, President, The Liberty Consulting Team
Timothy Loney	June 1, 1982	DPA, 1983	1		MT				58.0		2012-present, Associate Director, Online MPA program, University of San Francisco.
Anthony Manzanetti <sup>43</sup>				0	MT			20.0			2013-present, Attorney III, Department of Managed Health Care, Sacramento, CA. Lead Area Faculty Chair – Law – University of Phoenix September 2011 – Present

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											Faculty mentorship, faculty evaluation, lead content area meetings, new faculty assessments, reviewing curriculum
Katy Martin <sup>44</sup>		MA, 2008		0	UT			33.0			2013, published in Popular Music and Society
Carol Miller <sup>45</sup>				0	UT					20.0	
Katherine Naff <sup>46</sup>	January 2015	Ph D, 1996		0	MT	25.0					2+ PRJs in past 5 years 1 book in past 5 years
Irine Onciano	January 2003	MBA, 2001		1	UT and MT				33.0		2004-present, Onciano Consulting, Managing Principal and Lead Consultant
Christine Schachter <sup>47</sup>				0	MT			20.0			2014-present, Administrative Management Analyst, City of Gardena, CA. Staff Report Regarding Tobacco and Electronic Cigarette Retailers and Consideration of Amendment to the Gardena Municipal Code Relating to E-Cigarettes; Ordinance No. 1753 Adopted May 27, 2014 Staff Report on California Penal Code 647(b) Violations, Human Trafficking Statistics, and a Potential Massage Establishments Moratorium in the City of Gardena, March 2014

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											Study: Findings, Observations and Recommendations for Process Improvement of the City of Redondo Beach Police Department Payroll System, January 2014 CMGT 590 Directed Research: Analysis of Behavioral Style Assessment Instruments in the Context of Personal Development, July 2012
Beverly Schulz <sup>48</sup>					UT					0.0	
Bruce Smith <sup>49</sup>				0	MT		25.0				PhD, Economics. Management Consultant
JoAnne Speers <sup>50</sup>	January 2014	JD, 1985	0		MT			33.0			9+ articles in past 5 years.
Lynn Thull	August 2012	Ph D, 1993		1	MT				25.0		1999-present, LMT Consulting
Robert Toone <sup>51</sup>	January 2015	JD, 1983		0	MT				25.0		2007-present, Independent Government Administration Professional
Peter Wright <sup>52</sup>	August 2013	MA, 2010		0	MT			50.0			Sept. 2010 – Present, University of California, Santa Barbara Ph.D. Student
<b>Public and Nonprofit Administration: Term Assistant Professor</b>											
Anthony Ribera	November 1, 1997	Ph D, 1987	4		UT, MT and SER		100.0				Instructor, California Peace Officers Standards and Training. (1990 - Present)
<b>Total Public and Nonprofit Administration</b>			8	5		758.0 (43.8%)	228.0 (13.2%)	222.0 (12.8%)	405.0 (23.4%)	119.0 (6.9%)	
						Minimum SA: >= 40% requirement for AACSB met (43.8%)					

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			>= 60% requirement for P for AACSB met (61.5%)			Minimum SA + PA + SP: >= 60% requirement for AACSB met (69.7%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.1%)					
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Grand Total											
Grand Total			440	166		6665.0 (52.7%)	1225.0 (9.7%)	480.0 (3.8%)	3097.0 (24.5%)	1170.0 (9.3%)	
			>= 75% requirement for P for AACSB not met (72.6%)			Minimum SA: >= 40% requirement for AACSB met (52.7%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (66.2%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (90.7%)					
Faculty Sufficiency Indicators:						Faculty Qualification Indicators:					
<ul style="list-style-type: none"><li>Overall: P/(P+S) &gt;= 75%</li><li>By discipline, location, delivery mode, or program: P/(P+S) &gt;= 60%</li></ul>						<ul style="list-style-type: none"><li>Minimum SA: (SA)/(SA + PA + SP + IP + O) &gt;= 40%</li><li>Minimum SA + PA + SP: (SA + PA + SP)/(SA + PA + SP + IP + O) &gt;= 60%</li><li>Minimum SA + PA + SP + IP: (SA + PA + SP + IP)/(SA + PA + SP + IP + O) &gt;= 90%</li></ul>					

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Faculty Portfolio			Faculty Sufficiency		Percent of Time Devoted to Mission for Each Faculty Qualification Group				
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)
			>= 60% requirement for P for AACSB met (100.0%)		Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total MBA: San Francisco-Downtown			68	10	2017.0 (65.8%)	300.0 (9.8%)	66.0 (2.2%)	581.0 (19.0%)	100.0 (3.3%)
			>= 60% requirement for P for AACSB met (87.2%)		Minimum SA: >= 40% requirement for AACSB met (65.8%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (77.8%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (96.7%)				
Total MBA			70	10	2117.0 (66.9%)	300.0 (9.5%)	66.0 (2.1%)	581.0 (18.4%)	100.0 (3.2%)
			>= 60% requirement for P for AACSB met (87.5%)		Minimum SA: >= 40% requirement for AACSB met (66.9%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (78.5%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (96.8%)				
Total MGEM: San Francisco-Downtown			2	3	200.0 (60.2%)	0.0 (0.0%)	0.0 (0.0%)	132.0 (39.8%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB not met (40.0%)		Minimum SA: >= 40% requirement for AACSB met (60.2%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (60.2%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total MGEM			2	3	200.0 (60.2%)	0.0 (0.0%)	0.0 (0.0%)	132.0 (39.8%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB not met (40.0%)		Minimum SA: >= 40% requirement for AACSB met (60.2%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (60.2%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total MSFA: San Francisco-Downtown			45	25	417.0 (52.6%)	20.0 (2.5%)	53.0 (6.7%)	250.0 (31.5%)	53.0 (6.7%)
			>= 60% requirement for P for AACSB met (64.3%)		Minimum SA: >= 40% requirement for AACSB met (52.6%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (61.8%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.3%)				
Total MSFA			45	25	417.0 (52.6%)	20.0 (2.5%)	53.0 (6.7%)	250.0 (31.5%)	53.0 (6.7%)
			>= 60% requirement for P for AACSB met (64.3%)		Minimum SA: >= 40% requirement for AACSB met (52.6%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (61.8%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.3%)				
Total MSOD: Pleasanton			7	1	300.0 (54.6%)	0.0 (0.0%)	0.0 (0.0%)	149.0 (27.1%)	100.0 (18.2%)
			>= 60% requirement for P for AACSB met (87.5%)		Minimum SA: >= 40% requirement for AACSB met (54.6%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (54.6%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (81.8%)				
Total MSOD: San Francisco-Downtown			8	4	400.0 (62.4%)	17.0 (2.7%)	0.0 (0.0%)	224.0 (34.9%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (66.7%)		Minimum SA: >= 40% requirement for AACSB met (62.4%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (65.1%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total MSOD			15	5	700.0 (58.8%)	17.0 (1.4%)	0.0 (0.0%)	373.0 (31.3%)	100.0 (8.4%)
			>= 60% requirement for P for AACSB met (75.0%)		Minimum SA: >= 40% requirement for AACSB met (58.8%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (60.3%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (91.6%)				
Grand Total			440	166	8874.0 (51.1%)	1734.0 (10.0%)	311.0 (1.8%)	4587.0 (26.4%)	1850.0 (10.7%)
			>= 75% requirement for P for AACSB not met (72.6%)		Minimum SA: >= 40% requirement for AACSB met (51.1%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (62.9%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (89.3%)				
Faculty Sufficiency Indicators:					Faculty Qualification Indicators:				
<ul style="list-style-type: none"> <li>Overall: P/(P+S) &gt;= 75%</li> <li>By discipline, location, delivery mode, or program: P/(P+S) &gt;= 60%</li> </ul>					<ul style="list-style-type: none"> <li>Minimum SA: (SA)/(SA + PA + SP + IP + O) &gt;= 40%</li> <li>Minimum SA + PA + SP: (SA + PA + SP)/(SA + PA + SP + IP + O) &gt;= 60%</li> <li>Minimum SA + PA + SP + IP: (SA + PA + SP + IP)/(SA + PA + SP + IP + O) &gt;= 90%</li> </ul>				

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AACSB Table 15-2: DEPLOYMENT OF PARTICIPATING AND SUPPORTING FACULTY BY QUALIFICATION STATUS IN SUPPORT OF DEGREE PROGRAMS FOR THE MOST RECENTLY COMPLETED NORMAL ACADEMIC YEAR USING COURSES TAUGHT  
Date Range: September 1, 2014 - August 31, 2015

	Percent of teaching (measured by courses taught)					Total %
	Scholarly Academic (SA) %	Practice Academic (PA) %	Scholarly Practitioner (SP) %	Instructional Practitioner (IP) %	Other (O) %	
BSBA: Hilltop	49.38%	9.01%	2.8%	27.64%	11.18%	100%
BSBA	49.38%	9.01%	2.8%	27.64%	11.18%	100%
BSM: Hilltop	36.36%	9.09%	0%	9.09%	45.45%	100%
BSM: Pleasanton	12.5%	18.75%	12.5%	37.5%	18.75%	100%
BSM: Sacramento	33.33%	16.67%	0%	50%	0%	100%
BSM: San Francisco-Downtown	5.56%	5.56%	0%	66.67%	22.22%	100%
BSM: San Jose	15%	5%	10%	20%	50%	100%
BSM: Santa Rosa	0%	23.08%	0%	69.23%	7.69%	100%
BSM	16.67%	12.5%	4.17%	42.71%	23.96%	100%
EMBA: San Francisco-Downtown	63.16%	5.26%	0%	15.79%	15.79%	100%
EMBA	63.16%	5.26%	0%	15.79%	15.79%	100%
MBA: Hilltop	100%	0%	0%	0%	0%	100%
MBA: San Francisco-Downtown	64.56%	11.39%	3.8%	15.19%	5.06%	100%
MBA	65.43%	11.11%	3.7%	14.81%	4.94%	100%
MGEM: San Francisco-Downtown	40%	0%	0%	60%	0%	100%
MGEM	40%	0%	0%	60%	0%	100%
MSFA: San Francisco-Downtown	45.07%	2.82%	7.04%	29.58%	15.49%	100%
MSFA	45.07%	2.82%	7.04%	29.58%	15.49%	100%
MSOD: Pleasanton	50%	0%	0%	37.5%	12.5%	100%
MSOD: San Francisco-Downtown	41.67%	8.33%	0%	50%	0%	100%
MSOD	45%	5%	0%	45%	5%	100%

1. Provide information for the most recently completed normal academic year. Each cell represents the percent of total teaching (whether measured by credit hours, contact hours, courses taught or another metric appropriate to the school) for each degree program level by faculty qualifications status. The sum across each row should total 100 percent. Provide a brief analysis that explains the deployment of faculty as noted above to mission, expected outcomes, and strategies.

**Fall 2015 Tables 15-1 & 15-2**



**AACSB Table 15-1: FACULTY SUFFICIENCY AND QUALIFICATIONS SUMMARY FOR THE MOST RECENTLY COMPLETED NORMAL ACADEMIC YEAR USING COURSES TAUGHT (RE: Standards 5 and 15)**

Date Range: September 1, 2015 - December 31, 2015

Faculty Portfolio			Faculty Sufficiency		Percent of Time Devoted to Mission for Each Faculty Qualification Group				
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)
Total Accounting			19	12	653.0 (55.0%)	120.0 (10.1%)	0.0 (0.0%)	282.0 (23.7%)	133.0 (11.2%)
			>= 60% requirement for P for AACSB met (61.3%)		Minimum SA: >= 40% requirement for AACSB met (55.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (65.1%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (88.8%)				
Total Business Analytics and Information Systems			16	13	425.0 (45.8%)	167.0 (18.0%)	0.0 (0.0%)	303.0 (32.7%)	33.0 (3.6%)
			>= 60% requirement for P for AACSB not met (55.2%)		Minimum SA: >= 40% requirement for AACSB met (45.8%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (63.8%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (96.4%)				
Total Economics, Law, and International Business			13	8	300.0 (31.7%)	248.0 (26.2%)	100.0 (10.6%)	198.0 (20.9%)	100.0 (10.6%)
			>= 60% requirement for P for AACSB met (61.9%)		Minimum SA: >= 40% requirement for AACSB not met (31.7%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (68.5%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (89.4%)				
Total Entrepreneurship, Innovation, and Strategy			30	7	817.0 (54.0%)	233.0 (15.4%)	0.0 (0.0%)	464.0 (30.6%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (81.1%)		Minimum SA: >= 40% requirement for AACSB met (54.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (69.4%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total Finance			42	7	1050.0 (73.6%)	0.0 (0.0%)	20.0 (1.4%)	256.0 (18.0%)	100.0 (7.0%)
			>= 60% requirement for P for AACSB met (85.7%)		Minimum SA: >= 40% requirement for AACSB met (73.6%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (75.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.0%)				
Total Hospitality Management			14	0	300.0 (56.3%)	0.0 (0.0%)	0.0 (0.0%)	233.0 (43.7%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (100.0%)		Minimum SA: >= 40% requirement for AACSB met (56.3%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (56.3%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total Marketing			18	3	766.0 (76.7%)	0.0 (0.0%)	33.0 (3.3%)	100.0 (10.0%)	100.0 (10.0%)
			>= 60% requirement for P for AACSB met (85.7%)		Minimum SA: >= 40% requirement for AACSB met (76.7%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (80.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (90.0%)				
Total Organization, Leadership, and Communication			36	7	998.0 (65.0%)	33.0 (2.1%)	33.0 (2.1%)	372.0 (24.2%)	100.0 (6.5%)
			>= 60% requirement for P for AACSB met (83.7%)		Minimum SA: >= 40% requirement for AACSB met (65.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (69.3%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.5%)				
Total Public and Nonprofit Administration			3	1	633.0 (47.8%)	253.0 (19.1%)	153.0 (11.6%)	199.0 (15.0%)	86.0 (6.5%)
			>= 60% requirement for P for AACSB met (75.0%)		Minimum SA: >= 40% requirement for AACSB met (47.8%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (78.5%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.5%)				
Grand Total			191	58	5942.0 (57.2%)	1054.0 (10.1%)	339.0 (3.3%)	2407.0 (23.2%)	652.0 (6.3%)
			>= 75% requirement for P for AACSB met (76.7%)		Minimum SA: >= 40% requirement for AACSB met (57.2%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (70.6%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.7%)				
Faculty Sufficiency Indicators: <ul style="list-style-type: none"><li>Overall: P/(P+S) &gt;= 75%</li><li>By discipline, location, delivery mode, or program: P/(P+S) &gt;= 60%</li></ul>					Faculty Qualification Indicators: <ul style="list-style-type: none"><li>Minimum SA: (SA)/(SA + PA + SP + IP + O) &gt;= 40%</li><li>Minimum SA + PA + SP: (SA + PA + SP)/(SA + PA + SP + IP + O) &gt;= 60%</li><li>Minimum SA + PA + SP + IP: (SA + PA + SP + IP)/(SA + PA + SP + IP + O) &gt;= 90%</li></ul>				

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**AACSB Table 15-1: FACULTY SUFFICIENCY AND QUALIFICATIONS SUMMARY FOR THE MOST RECENTLY COMPLETED NORMAL  
ACADEMIC YEAR USING COURSES TAUGHT (RE: Standards 5 and 15)  
Date Range: September 1, 2015 - December 31, 2015**

Faculty Portfolio			Faculty Sufficiency			Percent of Time Devoted to Mission for Each Faculty Qualification Group						Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Normal Professional Responsibilities	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)		
Accounting: Professor												
Diane Roberts	September 10, 1985	Ph D, 1995	3		UT, MT, RES and SER	100.0					3+ PRJs in past 5 years.	
Accounting: Associate Professor												
Carol Graham	August 15, 1998	Ph D, 1995	2		UT, RES and SER	100.0					PhD, Accounting 2 PRJs in last 5 years 2+ PR Conference Paper Presentations	
John Koeplin	September 1, 1985	Ph D, 1998	1		UT, RES and SER		100.0				8/2011-present, Rector, Loyola House Jesuit Community 8/2011-present, BoT, USF 8/2010-present, BoT, SCU	
Todd Sayre	August 24, 1998	Ph D, 1994	2		UT, RES and SER	100.0					2 PRJs in past 5 years. 4+ Conference presentations	

Faculty Portfolio			Faculty Sufficiency			Percent of Time Devoted to Mission for Each Faculty Qualification Group						Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Normal Professional Responsibilities	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)		
Accounting: Assistant Professor												
Fernando Comiran	August 15, 2014	Ph D, 2014	2		UT, RES and SER	100.0					PhD, Business Administration, 2014.	
Tatiana Fedyk	August 15, 2013	Ph D, 2008	2		UT, RES and SER					100.0	PhD, Accounting, 2008	
Joohyung Ha	August 15, 2014	Ph D, 2011	2		UT, RES and SER	100.0					PhD, Accounting, 2011	
Nicholas Ross <sup>1</sup>	January 2014	Ph D, 2012	2		UT, MT, RES and SER	100.0					Ph.D., 2012, Accounting	
Accounting: Adjunct Faculty												
Nikhil Bassi				1	UT				33.0		2014 - Present, Internal Auditor, Contra Costa Community College District – Martinez, CA	
George DeVries	July 2013	MBA, 1999		2	UT				66.0		2013-present, Socorro Medical, San Francisco, CA, Chief Financial Officer	
Lynn Henley	January 2015	MS, 1900		1	UT				17.0		11/2011 - present, Tax Partner, Armanino, LLP	

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Maleeha Khan	August 2013	MBA, 2013		1	UT				33.0		8/2009-present, Laurels Medical Services DBA Chariot, Sacramento, California, Business Analyst
Barbara Lougee <sup>2</sup>				1	MT	20.0					3+ PRJs in past 5 years.
Dawn Mayer		LLM, 2007		1	UT		20.0				2011-present, Tax Manager, University of San Francisco
Masooma Mir	January 2015	MBA, 2008		2	UT				33.0		2/2013-present, Laurels Medical Services, Vice-President
John O'Shaughnessy	August 2010	Ph D, 1990		1	UT	33.0					7+ PRJs in past 5 years.
Jennifer Wells	1995	MBA, 1994		2	UT					33.0	MBA, 1994.
<b>Accounting: Term Instructor</b>											
Claudia Roehl	September 1, 2004	BS, 1986	3		UT, MT and SER				100.0		Academic Director for MBA program(s)
<b>Total Accounting</b>			19	12		653.0 (55.0%)	120.0 (10.1%)	0.0 (0.0%)	282.0 (23.7%)	133.0 (11.2%)	
						Minimum SA: >= 40% requirement for AACSB met (55.0%)					

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Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
			>= 60% requirement for P for AACSB met (61.3%)			Minimum SA + PA + SP: >= 60% requirement for AACSB met (65.1%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (88.8%)					
Business Analytics and Information Systems: Professor											
Vijay Mehrotra	August 1, 2009	Ph D, 1992	3		MT, RES and SER	100.0					5+ PRJs in past 5 years.
Business Analytics and Information Systems: Associate Professor											
Jeff Hamrick <sup>3</sup>	September 1, 2012	Ph D, 2009		1	MT, ADM, RES and SER	25.0					3+ PRJs in past 5 years.
Business Analytics and Information Systems: Assistant Professor											
Maira Gunn	February 5, 1979	Ph D, 1974	2		MT, RES and SER	100.0					2+ PRJs in past 5 years 8+ presentations
Business Analytics and Information Systems: Adjunct Faculty											
Ornella Bonamassa	June 2013	Ph D, 1995		2	UT				33.0		Circle Bee Farm, Founder
Helmut Buehler <sup>4</sup>	May 1996	EDD		0	MT		25.0				2013-present, Principal Consultant, Management Consulting EdD, 2005
Donald Danner	August 2013	M.S.B.A., 1995		2	UT and MT				33.0		1996-present, SFSU Faculty 2005-2010, UCSF consultant

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Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Daryoush Farsi	August 2001	Ph D, 1990		1	MT					33.0	2010-present, DDF Financial Consultant & Property Management
Payson Johnston	May 2013	MBA, 2007		2	UT and MT				66.0		2014-present, CEO & co-founder, Agora Intelligence, Inc.
Vera Klimkovskaia	August 2008	MA, 2006		1	UT				33.0		2006-present, Lecturer, SFSU
William Kolb	August 1993	MS, 1985	1		UT and MT				25.0		2011-present, Independent Consultant. 2004-present, Managing Consultant, IP International, San Mateo, CA
Edward Kreutzer <sup>5</sup>	August 2003	MBA, 2002		0	MT				58.0		11/2012-present, Hadoop Team, Sr. Database Developer/Engineer
Steven Lopez <sup>6</sup>	May 1997	EDD, 2009		0	MT		25.0				2004-present,

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											Independent Consultant EdD, Transformational Leadership Internet Security, E-Commerce.
Brian MacDonald	August 15, 2015	MS, 2011		1	UT				22.0		Wells Fargo Asset Management , Investment Analyst, 2015-present
Kevin Potcner	August 15, 2015	M.S./Ph.D., 2001		2	MT		17.0				PhD + 1 1PRJ Minitab Director of Statistical Consulting Services Founder and Principal, Expectation Labs, Inc.
John Sander	June 2011	JD, 2011		1	UT				33.0		3/2014-present, Senior Analyst, Xtime, Redwood Shores, CA
<b>Business Analytics and Information Systems: Term Assistant Professor</b>											
Muhammad Al-Abdullah	August 15, 2015	Ph D, 2015	4		UT and SER	100.0					PhD., 2015, Information Systems

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Business Analytics and Information Systems: Term Associate Professor											
Stephen Morris	January 7, 1991	EDD, 2010	2		UT, MT, RES and SER		100.0				EdD, December, 2010 1 PRJ, 3 presentations in past 5 years MSIS Program director, 2013-2015 PA for BUS 308 courses based on Appendix D.
Mouwafac Sidaoui	September 1, 1996	EDD, 2007	4		UT, MT, RES and SER	100.0					AACSB, Bridge to Business Program , 2011
Total Business Analytics and Information Systems			16	13		425.0 (45.8%)	167.0 (18.0%)	0.0 (0.0%)	303.0 (32.7%)	33.0 (3.6%)	
			>= 60% requirement for P for AACSB not met (55.2%)			Minimum SA: >= 40% requirement for AACSB met (45.8%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (63.8%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (96.4%)					
Economics, Law, and International Business: Professor											
W Becker	August 15, 1975	Ph D, 1975	2		UT, RES and SER		100.0				JD Pro-bono work, Alameda & Contra Costa Bar Associations
Karl Boedecker	August 15, 1976	Ph D, 1974	1		UT, MT, RES and SER	100.0					2+ PRJs in past 5 years

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Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
											10+ presentations
James Shaw	August 27, 1982	Ph D, 1980	3		UT, MT and SER					100.0	Does not fall into any qualification categories.
Xiaohua Yang	May 1, 2009	Ph D, 1996	1		UT, MT, RES and SER	100.0					8+ PRJs in past 5 years.
<b>Economics, Law, and International Business: Associate Professor</b>											
Richard Johnson III	August 1, 2011	DPA, 1994	0		UT, MT, RES and SER	100.0					7+ PRJs in past 5 years.
<b>Economics, Law, and International Business: Adjunct Faculty</b>											
Vivian Faustino-Pulliam	January 2009	MBA, 2004		2	UT				66.0		12/2013-present, Program Development, Asian Women's Shelter
David Griffis	August 2004	JD, 1992	2		UT and SER				66.0		1992-present, Litigation Partner, Reid, Axelrod, McCormack & Griffis
Bikku Kuruvila		JD, 1997		1	UT and MT		16.0				JD. Senior Consultant, Indian Financial Law, 2009-2013 New York City Taxi & Limousine

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											Commission and Office of Administrative Trials & Hearings (part-time Administrative Law Judge, 2008--2013)
Stanley Kwong	November 1, 2009	MS	1		UT and SER				33.0		2009-present, ChinaSF, Strategic Advisor and Executive Committee member 2009-present, Bay Area Council, Strategic Advisor
Mitesh Patel		JD, 2010		2	UT		66.0				J.D., 2010 (teaching Business Law) 2010-present, Supervisor, Lincoln Law School, Intellectual Property Clinic 2011-present, Attorney, Raj Abhyanker

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											PC/LegalForce Inc.
Carolyn Shaw		MS, 1998		1	UT				33.0		2009-present, Technology Operations Center & Business Intelligence & Projects, Information & Communication Services, University of California Davis Health System, Manager
Loran Simon				1	UT		33.0				J.D., 2011 (teaching Bus. Law) 2012-2014, Deputy Attorney General, California Dept. of Justice.
Alan Spector	August 2014	JD, 1985		1	UT		33.0				JD, 1985 2007-present, Consultant, Resources Global Professionals, San Francisco, CA.

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Economics, Law, and International Business: Term Assistant Professor											
Isabelle Lescent-Giles	August 2013	Ph D, 1992	3		UT and SER			100.0			Ph.D., Economic History 1/2007-present, The Winthrop Group (New York and San Francisco), USA, Senior consultant. 11/2012-present, Nomadic, Course advisor
Total Economics, Law, and International Business			13	8		300.0 (31.7%)	248.0 (26.2%)	100.0 (10.6%)	198.0 (20.9%)	100.0 (10.6%)	
			>= 60% requirement for P for AACSB met (61.9%)			Minimum SA: >= 40% requirement for AACSB not met (31.7%)					
						Minimum SA + PA + SP: >= 60% requirement for AACSB met (68.5%)					
						Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (89.4%)					
Entrepreneurship, Innovation, and Strategy: Professor											
Jonathan Allen	September 1, 2003	Ph D, 1995	3		UT, RES and SER	100.0					6+ PRJs in past 5 years.
David Batstone	August 15, 1994	Ph D, 1989	2		UT, MT, RES and SER		100.0				Not for Sale campaign Co-founder & Managing Partner, Just Business
Mark Cannice	August 15, 1996	Ph D, 1997	2		UT, RES, ED and SER	100.0					4+ PRJs in past 5 years.
Roger (Rongxin) Chen	August 15, 1995	Ph D, 1996	2		MT, RES, ED and SER	100.0					3+ PRJs in past 5 years.

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Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Elizabeth Davis	August 1, 2014	Ph D, 1984	1		ADM and SER	100.0					5+ PRJs in last 5 years
<b>Entrepreneurship, Innovation, and Strategy: Associate Professor</b>											
Sun-Young Park	August 1, 2010	Ph D, 2006	2		UT, RES and SER	100.0					10+ PRJs in past 5 years.
<b>Entrepreneurship, Innovation, and Strategy: Assistant Professor</b>											
Monika Hudson	January 1, 2006	DM, 2007	3		UT, MT, RES and SER	100.0					3+ PRJs in past five years. Managing Principal, The MGT Group, Millbrae, CA, 1990-present
Jennifer Walske	January 1, 2013	DBA, 2009	3		MT, RES, ED and SER	100.0					3+ PRJs in past 5 years.
Liang Wang	September 1, 2011	Ph D, 2011	1		UT, MT, RES and SER	100.0					3+ PRJs in past 5 years.
<b>Entrepreneurship, Innovation, and Strategy: Adjunct Faculty</b>											
John Branch				1	MT	17.0					2+ PRJs in past 5 years. 3+ presentations
David Epstein	August 2003	MBA, 1984		1	UT				33.0		6/2008-present, Epstein Advisors 6/2012-11/2013, Sol Voltaics
Dan Himelstein	August 2010	MS, 1988		1	UT				66.0		2008-present, Your Local Playground,

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											San Francisco, CA, Founder.
Eric Lacy <sup>9</sup>				0	UT				33.0		2008-current, ecl-solutions, LLC, Managing Principal, Consulting.
Jonathan Littman	January 2013	BA, 1999		1	UT				33.0		2004-present, Snowball narrative
Luigi Lucaccini	August 1983	Ph D, 1968		1	UT		33.0				Ph.D., Engineering Psychology 2010-13 Consultant, Achetype International, Inc., software design, Emeryville, CA 2010-15 Consultant, Perceptronics Solutions, Inc. AI and training systems design, Encino, CA 2010-15 Trustee/investment manager and fiduciary, Campiglia

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											Trusts (combined value 10M)
Patrick O'Regan Jr			2		UT				33.0		2006-present, Founder, Nobska Technologies, Inc., San Carlos, CA.
Susan Stryker	January 2014	MS, 1975		2	UT				66.0		2010-present, Stryker Technical, Berkeley, CA.
<b>Entrepreneurship, Innovation, and Strategy: Term Assistant Professor</b>											
Lan-Huong Nguyen	February 1, 2003	MBA, 1989	3		UT and SER				100.0		2005-present, International Business Developer, Advisor to start-ups
<b>Entrepreneurship, Innovation, and Strategy: Term Associate Professor</b>											
Laurie MacPherson	January 1, 1993	DM, 2002	4		MT and SER		100.0				2003-2011, Encore Consultants, LLC.
<b>Entrepreneurship, Innovation, and Strategy: Term Instructor</b>											
Gleb Nikitenko	January 15, 2014	EDD, 2009	2		UT and SER				100.0		SA for BSM Public Administration Courses

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											IP for Entrepreneurship Courses	
Total Entrepreneurship, Innovation, and Strategy			30	7		817.0 (54.0%)	233.0 (15.4%)	0.0 (0.0%)	464.0 (30.6%)	0.0 (0.0%)		
			>= 60% requirement for P for AACSB met (81.1%)			Minimum SA: >= 40% requirement for AACSB met (54.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (69.4%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)						
Finance: Professor												
Barry Doyle	August 15, 1984	Ph D, 1985	1		MT, ADM, RES and SER	100.0					2+ PRJs in past 5 years. 3+ conference proceedings	
Robert Mefford	September 1, 1979	Ph D, 1983	3		UT, MT, RES and SER	100.0					5+ PRJs in past 5 years.	
Manuel Tarrazo	September 1, 1988	Ph D, 1993	2		UT, RES and SER	100.0					5+ PRJs in past 5 years.	
John Veitch	September 1, 1992	Ph D, 1985	7		MT, RES and SER	100.0					AACSB Bridge 2015	
Finance: Associate Professor												
Ludwig Chincarini	August 15, 2012	Ph D, 1995	5		MT, RES, ED and SER	100.0					7+ PRJs in past 5 years.	
Cathy Goldberg	January 15, 2001	Ph D, 2001	2		UT, RES and SER	100.0					2 PRJs in past 5 yrs. 1 refereed conference proceeding.	
Finance: Assistant Professor												
Xiaoya Ding	August 15, 2011	Ph D, 2011	2		UT, RES and SER	100.0					PhD., 2011	
Finance: Adjunct Faculty												

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Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Daniel Amir	January 2013	MBA, 2000		1	UT				33.0		2014-present, Ladenburg Thalmann, Managing Director Equity Research
Satish Ananthaswamy	August 2006	MBA, 1992	1		MT				66.0		1998-Present: Director and Sr. Portfolio Manager, Bond Portfolio Management, Board of Regents, Office of the CIO, University of California, Oakland, CA
Jeffrey Breyer <sup>10</sup>		Ed.M., 1991		0	MT				0.0		1990-present, Corporate Trainer & Professional Coach
Brent Burns	January 2013	MBA, 2000		3	UT and MT				66.0		Asset Dedication, LLC President and Co-Founder 2002-Present
Yuri Fedyk		Ph D, 2009	1		UT			20.0			1 PRJ in past 5 years

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											2011-2012, Joint Stock Company "PromActive", Moscow, Russia, founder
John Green	January 1992	JD, 1969	2		UT and SER				66.0		Consultant, 2010-Present
Simone Hoelck <sup>11</sup>		MA, 2005								0.0	
Mark Sherman		MBA, 1998		1	MT				25.0		1999-present, Principal, Van Strum & Towne, Inc., San Francisco, CA.
Lawrence Souza		DBA, 2014		1	UT	33.0					2014 - DBA-Doctor of Business Administration, Corporate Finance/Real Estate Management
Torben Voetmann	January 2013	Ph D, 2000		1	MT	17.0					2 PRJs + 2 additional publications in past 5 years. PhD, Finance, 2000.
Finance: Term Assistant Professor											

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Ivan Asensio	August 20, 2015	Ph D, 2013	4		MT and SER	100.0					Ph.D., 2013, Economics.	
John Gonzales	August 15, 1996	Ph D, 1983	3		UT, MT, RES and SER	100.0					AACSB Bridge, 2013	
Finance: Term Associate Professor												
Frank Ohara	February 9, 1987	JD, 1991	5		UT, MT, RES and SER	100.0					AACSB, Bridge to Business Program , 2011	
Kashi Tiwari	August 15, 2015	Ph D, 1981	4		UT, MT and SER					100.0		
Total Finance			42	7		1050.0 (73.6%)	0.0 (0.0%)	20.0 (1.4%)	256.0 (18.0%)	100.0 (7.0%)		
			>= 60% requirement for P for AACSB met (85.7%)			Minimum SA: >= 40% requirement for AACSB met (73.6%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (75.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.0%)						
Hospitality Management: Associate Professor												
Michael Collins	August 15, 2013	Ph D, 2007	4		UT, RES and SER	100.0					4+ PRJs in past 5 years.	
Thomas Maier	August 15, 2014	Ph D, 2008	3		UT, MT, RES and SER	100.0					10+ PRJs in past 5 years.	
Hospitality Management: Assistant Professor												
Michelle Millar	June 1, 2010	Ph D, 2009	2		UT, RES and SER	100.0					8+ PRJs in past 5 years.	
Hospitality Management: Adjunct Faculty												
Kathy Odsather	January 2008	BA, 1975	2		UT and SER				100.0		2003-present, Associate Director, Hospitality Management	
Jeffrey Scharosch	August 2013	MA, 1997	1		UT				33.0		1994-present,	

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											General Manager, Spinnaker Restaurant, Sausalito, CA
Hospitality Management: Term Instructor											
Jean-Marc Fullsack	February 1, 1997	Certificat d'aptitude professionnel (CAP) Diplome, 1972	2		UT and SER						1997-present, Executive Chef Instructor
Total Hospitality Management			14	0		300.0 (56.3%)	0.0 (0.0%)	0.0 (0.0%)	233.0 (43.7%)	0.0 (0.0%)	
			>= 60% requirement for P for AACSB met (100.0%)			Minimum SA: >= 40% requirement for AACSB met (56.3%)					
						Minimum SA + PA + SP: >= 60% requirement for AACSB not met (56.3%)					
						Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)					
Marketing: Professor											
Nicholas Imparato	September 1, 1970	Ph D, 1970	1		UT, RES and SER	100.0					2+ PRJs in past 5 years 2+ presentations in past 5 years.
Marketing: Associate Professor											
Jonathan Barsky	September 1, 1985	Ph D, 1991	2		UT, MT, RES and SER	100.0					3 PRJs in past 5 years.
Shenzhao Fu	August 15, 1989	Ph D, 1989	2		UT and SER					100.0	
Anthony Patino	August 15, 2013	Ph D, 2006	2		UT, MT, RES and SER	100.0					11+ PRJs in past 5 years.
Sweta Thota	September 1, 2008	Ph D, 2004	2		UT, RES and SER	100.0					5+ PRJs in past 5 years

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Ricardo Villarreal	February 1, 2009	Ph D, 2004	2		UT, MT, RES and SER	100.0					3+ PRJs in past 5 years.
Marketing: Assistant Professor											
Sonja Poole	September 1, 2008	Ph D, 2007	2		UT, RES and SER	100.0					3+ PRJs in past 5 years. 6+ Conference Proceedings
Marketing: Adjunct Faculty											
Mohammed Nadeem				2	UT	66.0					Ph.D. e-Business. 3+ PRJs in past 5 years.
Stephan Sorger	August 2013	MBA, 1992		1	MT			33.0			5/2009-present, Vice President, Strategic Marketing: On Demand Advisors
Marketing: Term Assistant Professor											
An Tran	August 20, 2015	Ph D, 2013	2		UT, MT and SER	100.0					Ph.D., 2013, Marketing.
Marketing: Term Instructor											
John O'Meara	February 1, 2010	MBA, 1985	3		UT, MT and SER				100.0		2010-present, New Growth Consulting, LLC, Principle.
Total Marketing			18	3		766.0 (76.7%)	0.0 (0.0%)	33.0 (3.3%)	100.0 (10.0%)	100.0 (10.0%)	
						Minimum SA: >= 40% requirement for AACSB met (76.7%)					
						Minimum SA + PA + SP: >= 60% requirement for AACSB met (80.0%)					

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			>= 60% requirement for P for AACSB met (85.7%)			Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (90.0%)					
Organization, Leadership, and Communication: Professor											
Kathleen Kane	September 1, 1991	Ph D, 1992	4		MT, RES and SER	100.0					5+ PRJs in past 5 years
Organization, Leadership, and Communication: Assistant Professor											
Zachary Burns	August 20, 2015	Ph D, 2013	2		UT, RES and SER	100.0					Ph.D, 2013, Managerial and Organizational Behavior
Rebekah Dibble	August 15, 2011	Ph D, 2010	2		UT, MT and RES	100.0					2+ PRJs in past 5 years. 1 book chapter. 3+ conference presentations .
Keith Hunter	June 1, 2011	Ph D, 2011	2		UT, RES and SER	100.0					PhD. 2011.
Eun Kyung Lee	August 2014	Ph D, 2013	2		UT, RES and SER	100.0					PhD., 2013 3+ PRJs in past 5 years.
Kevin Lo	March 1, 2011	Ph D, 2007	2		UT, RES and SER	100.0					5+ PRJs in past 5 years.
Matthew Monnot	August 15, 2014	Ph D, 2008	2		UT, MT, RES and SER	100.0					3+ PRJs in past 5 years.
Neil Walshe	February 1, 2009	Ph D, 2010	3		MT, RES and SER	100.0					2+ PRJs in past 5 years. 12+ presentations .
Organization, Leadership, and Communication: Adjunct Faculty											

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Jacqueline Alcalde				1	UT			33.0			MHROD, 1996. Founder, Evolutions Consulting Group, published book
Elie Asmar	2006	MS, 1979	1		MT				33.0		1992-present, Interpro, Inc., Santa Clara California, CEO
Paul Axelrod				1	UT				33.0		Ph.D., Political Science, 2004-present, Faculty, Adizes Graduate School, teaches Models of Conflict
Loni Davis	January 2014	Ph D, 2013	1		UT and MT	33.0					Received PhD, Human & Organizational Systems in 2013.
Steven Feinberg		Ph D, 1988		1	UT and MT				16.0		2000-Present, President/Owner, Steven Feinberg Inc. Palo Alto, Ca.:

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
											Leadership & influence strategist, innovation/ingenuity lab, decision triggers communications, leadership & organizational development with senior executives.
Suzanne Garrett <sup>12</sup>	March 2007			0	UT				0.0		Principal, Strategic Organizational Solutions, Inc., 2000-present.
Marla Lowenthal	January 2008	EDD, 1997	1		UT and MT		33.0				2011-present, SHAPE (Sexual Harassment & Assault Prevention Education), San Mateo, CA. Executive Director
Amy Martin	January 2015	MA, 2007	2		UT				33.0		10/2014-present, Trainer, Managed Health Network



Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Stephanie Martin				1	MT				25.0		2013-present, Principal & Founder, Martin Communications, San Francisco, CA.
Barrett McBride	August 2010	Ph D, 2013	2		UT and MT	66.0					PhD. 2013
Bradley Morrison		MA, 1991	2		UT and MT				66.0		1994-present, Morrison Forbes Consultants
Craig Nathanson	August 2013	Ph D, 2013	2		UT	66.0					PhD. 2013
Mary Wardell		EDD, 2008		2	MT	33.0					EdD., 2011, SA for Organizational Leadership
Jacquelyn de l'Eau	January 2014	MA, 1994		1	UT and MT				66.0		1997-present, Jacquelyn de l'Eau, Executive Consultant
<b>Organization, Leadership, and Communication: Term Assistant Professor</b>											
Edward Kass	September 1, 2008	Ph D, 1999	3		UT, MT, RES and SER					100.0	
Paul Ryder	June 1, 2005	Ph D, 2009	3		UT, MT, ED and SER				100.0		Serves in a significant leadership position in a business, non-profit, or public-

Faculty Portfolio			Faculty Sufficiency			Percent of Time Devoted to Mission for Each Faculty Qualification Group						Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Normal Professional Responsibilities	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)		
											service organization related to the field in which the faculty member teaches.	
Total Organization, Leadership, and Communication			36	7		998.0 (65.0%)	33.0 (2.1%)	33.0 (2.1%)	372.0 (24.2%)	100.0 (6.5%)		
			>= 60% requirement for P for AACSB met (83.7%)			Minimum SA: >= 40% requirement for AACSB met (65.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (69.3%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.5%)						
Public and Nonprofit Administration: Professor												
Larry Brewster <sup>13</sup>	August 15, 1999	Ph D, 1975	0		UT, MT and RES	100.0					4+ PRJs in past 5 years.	
Marco Tavanti <sup>14</sup>	August 15, 2014	Ph D, 2001	0		MT, RES and SER	100.0					15+ PRJs in past 5 years.	
Public and Nonprofit Administration: Associate Professor												
Richard Callahan <sup>15</sup>	August 15, 2011	DPA, 2002	0		MT, RES and SER	100.0					10+ PRJs in past 5 years	
Kimberly Connor <sup>16</sup>	August 15, 2001	Ph D, 1991	0		UT, MT, RES and SER	100.0					5+ PRJs in past 5 years.	
Ronald Harris <sup>17</sup>	January 15, 2013	Ph D, 1996	0		MT, RES and SER	100.0					5+ PRJs in past 5 years	
Catherine Horiuchi <sup>18</sup>	August 15, 2005	DPA, 2001	0		RES and SER		100.0				2011-2014, Associate Dean, School of Management , University of San Francisco.	
Richard Waters <sup>19</sup>	September 1, 2011	Ph D, 2007	0		MT, RES and SER	100.0					50+ PRJs in past 5 years	
Public and Nonprofit Administration: Adjunct Faculty												

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Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Shannon Calder <sup>20</sup>				0	UT				0.0		2013-present, Assoc. Director of Communications/Senior Writer, American Institute of Architects, California Council. Teaches Interdisciplinary Research & Writing.
Tim Gaffaney				1	MT		20.0				2013-present, Senior Fellow, Sacramento Regional Technology Alliance (SARTA), Sacramento, CA
Mary Katherine Garlick <sup>21</sup>	January 2008	Ph D, 2004		0	UT				33.0		2005-present, Instructor, Art Institute of California
Joshua Glasgow <sup>22</sup>	August 2008	Ph D, 2001		0	UT					33.0	Teaches INTD
Kenneth Goldstein <sup>23</sup>	August 2013	Ph D, 1996	0		MT and SER	33.0					5+ PRJs in past 5 years.
Michael Grimaldi <sup>24</sup>	May 2015	MA, 2009		0	MT				0.0		Retired from the LASD Leadership

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
											and Training Division in 2011.
John Himelright <sup>25</sup>	January 1995	Ph D, 1980		0	UT					33.0	
Donna Dan-Jing Hom <sup>26</sup>		MA, 2003		0	MT				25.0		2014-present, Interim Assistant City Administrator, City of Oakland, CA.
Benjamin Jackson <sup>27</sup>	August 2012	MFA, 2006		0	UT			33.0			Published and poetry in past 5 years.
Adele James <sup>28</sup>	August 2013	MA	0		MT				25.0		6/2009-present, Adele James Consulting & Coaching, Sacramento, CA
David Kersten <sup>29</sup>	January 2014	MA, 2000		0	MT				33.0		2005-present, Kersten Communications, Sacramento, CA
Margret Kim	January 2013	JD, 1988	1		MT and SER		33.0				8/2011-present, Air Resources Board, Senior Staff Counsel, Sacramento, CA.

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Timothy Loney <sup>30</sup>	June 1, 1982	DPA, 1983	0		MT				58.0		2012-present, Associate Director, Online MPA program, University of San Francisco.
Anthony Manzanetti <sup>31</sup>				0	MT			20.0			2013-present, Attorney III, Department of Managed Health Care, Sacramento, CA. Lead Area Faculty Chair – Law – University of Phoenix September 2011 – Present Faculty mentorship, faculty evaluation, lead content area meetings, new faculty assessments, reviewing curriculum
Carol Miller <sup>32</sup>				0	UT					20.0	
Elizabeth Schaffer <sup>33</sup>		MA, 1998		0	MT			17.0			2012-present,

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
											Global Fund for Women, Chief Financial and Operating Officer 1 article published in past 5 years
Beverly Schulz <sup>34</sup>					UT					0.0	
JoAnne Speers <sup>35</sup>	January 2014	JD, 1985	0		MT			33.0			9+ articles in past 5 years.
Martha Stillman <sup>36</sup>		Ph D, 2006		0	UT					0.0	
Lynn Thull <sup>37</sup>	August 2012	Ph D, 1993		0	MT				25.0		1999-present, LMT Consulting
Peter Wright <sup>38</sup>	August 2013	MA, 2010		0	MT			50.0			Sept. 2010 – Present, University of California, Santa Barbara Ph.D. Student
<b>Public and Nonprofit Administration: Term Assistant Professor</b>											
Anthony Ribera	November 1, 1997	Ph D, 1987	2		UT, MT and SER		100.0				Instructor, California Peace Officers Standards and Training. (1990 - Present)
<b>Total Public and Nonprofit Administration</b>			3	1		633.0 (47.8%)	253.0 (19.1%)	153.0 (11.6%)	199.0 (15.0%)	86.0 (6.5%)	

Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
			>= 60% requirement for P for AACSB met (75.0%)			Minimum SA: >= 40% requirement for AACSB met (47.8%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (78.5%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.5%)					
Faculty Portfolio			Faculty Sufficiency		Normal Professional Responsibilities	Percent of Time Devoted to Mission for Each Faculty Qualification Group					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)		Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)	
Grand Total											
Grand Total			191	58		5942.0 (57.2%)	1054.0 (10.1%)	339.0 (3.3%)	2407.0 (23.2%)	652.0 (6.3%)	
			>= 75% requirement for P for AACSB met (76.7%)			Minimum SA: >= 40% requirement for AACSB met (57.2%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (70.6%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.7%)					
Faculty Sufficiency Indicators:						Faculty Qualification Indicators:					
<ul style="list-style-type: none"><li>Overall: P/(P+S) &gt;= 75%</li><li>By discipline, location, delivery mode, or program: P/(P+S) &gt;= 60%</li></ul>						<ul style="list-style-type: none"><li>Minimum SA: (SA)/(SA + PA + SP + IP + O) &gt;= 40%</li><li>Minimum SA + PA + SP: (SA + PA + SP)/(SA + PA + SP + IP + O) &gt;= 60%</li><li>Minimum SA + PA + SP + IP: (SA + PA + SP + IP)/(SA + PA + SP + IP + O) &gt;= 90%</li></ul>					

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**AACSB Table 15-1: FACULTY SUFFICIENCY AND QUALIFICATIONS SUMMARY FOR THE MOST RECENTLY COMPLETED NORMAL  
ACADEMIC YEAR USING COURSES TAUGHT (RE: Standards 5 and 15)  
Date Range: September 1, 2015 - December 31, 2015**

Faculty Portfolio			Faculty Sufficiency		Percent of Time Devoted to Mission for Each Faculty Qualification Group				
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)
<b>Total BSBA: Hilltop</b>			113	39	3631.0 (56.6%)	634.0 (9.9%)	120.0 (1.9%)	1696.0 (26.4%)	333.0 (5.2%)
			>= 60% requirement for P for AACSB met (74.3%)		Minimum SA: >= 40% requirement for AACSB met (56.6%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (68.4%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (94.8%)				
<b>Total BSBA</b>			113	39	3631.0 (56.6%)	634.0 (9.9%)	120.0 (1.9%)	1696.0 (26.4%)	333.0 (5.2%)
			>= 60% requirement for P for AACSB met (74.3%)		Minimum SA: >= 40% requirement for AACSB met (56.6%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (68.4%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (94.8%)				
<b>Total BSM: Pleasanton</b>			1	3	0.0 (0.0%)	20.0 (9.1%)	33.0 (15.1%)	66.0 (30.1%)	100.0 (45.7%)
			>= 60% requirement for P for AACSB not met (25.0%)		Minimum SA: >= 40% requirement for AACSB not met (0.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (24.2%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (54.3%)				
<b>Total BSM: Sacramento</b>			3	1	66.0 (50.0%)	33.0 (25.0%)	0.0 (0.0%)	33.0 (25.0%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (75.0%)		Minimum SA: >= 40% requirement for AACSB met (50.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (75.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
<b>Total BSM: San Francisco-Downtown</b>			7	2	33.0 (8.3%)	100.0 (25.1%)	0.0 (0.0%)	166.0 (41.6%)	100.0 (25.1%)
			>= 60% requirement for P for AACSB met (77.8%)		Minimum SA: >= 40% requirement for AACSB not met (8.3%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (33.3%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (74.9%)				
<b>Total BSM: San Jose</b>			5	1	100.0 (27.9%)	0.0 (0.0%)	0.0 (0.0%)	125.0 (34.9%)	133.0 (37.2%)
			>= 60% requirement for P for AACSB met (83.3%)		Minimum SA: >= 40% requirement for AACSB not met (27.9%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (27.9%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (62.8%)				
<b>Total BSM: Santa Rosa</b>			2	0	0.0 (0.0%)	0.0 (0.0%)	0.0 (0.0%)	66.0 (100.0%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (100.0%)		Minimum SA: >= 40% requirement for AACSB not met (0.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (0.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
<b>Total BSM</b>			18	7	199.0 (17.0%)	153.0 (13.0%)	33.0 (2.8%)	456.0 (38.8%)	333.0 (28.4%)
			>= 60% requirement for P for AACSB met (72.0%)		Minimum SA: >= 40% requirement for AACSB not met (17.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB not met (32.8%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB not met (71.6%)				
<b>Total EMBA: San Francisco-Downtown</b>			6	4	562.0 (81.8%)	100.0 (14.6%)	0.0 (0.0%)	25.0 (3.6%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (60.0%)		Minimum SA: >= 40% requirement for AACSB met (81.8%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (96.4%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
<b>Total EMBA</b>			6	4	562.0 (81.8%)	100.0 (14.6%)	0.0 (0.0%)	25.0 (3.6%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (60.0%)		Minimum SA: >= 40% requirement for AACSB met (81.8%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (96.4%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
<b>Total MBA: San Francisco-Downtown</b>			31	6	1500.0 (75.1%)	117.0 (5.9%)	33.0 (1.7%)	248.0 (12.4%)	100.0 (5.0%)
					Minimum SA: >= 40% requirement for AACSB met (75.1%)				

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Faculty Portfolio			Faculty Sufficiency		Percent of Time Devoted to Mission for Each Faculty Qualification Group				
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)
			>= 60% requirement for P for AACSB met (83.8%)		Minimum SA + PA + SP: >= 60% requirement for AACSB met (82.6%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (95.0%)				
Total MBA			31	6	1500.0 (75.1%)	117.0 (5.9%)	33.0 (1.7%)	248.0 (12.4%)	100.0 (5.0%)
			>= 60% requirement for P for AACSB met (83.8%)		Minimum SA: >= 40% requirement for AACSB met (75.1%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (82.6%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (95.0%)				
Total MSFA: San Francisco-Downtown			16	2	417.0 (82.1%)	0.0 (0.0%)	0.0 (0.0%)	91.0 (17.9%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (88.9%)		Minimum SA: >= 40% requirement for AACSB met (82.1%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (82.1%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total MSFA			16	2	417.0 (82.1%)	0.0 (0.0%)	0.0 (0.0%)	91.0 (17.9%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (88.9%)		Minimum SA: >= 40% requirement for AACSB met (82.1%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (82.1%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total MSOD: Pleasanton			2	0	200.0 (100.0%)	0.0 (0.0%)	0.0 (0.0%)	0.0 (0.0%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (100.0%)		Minimum SA: >= 40% requirement for AACSB met (100.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (100.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total MSOD: San Francisco-Downtown			5	0	333.0 (91.0%)	0.0 (0.0%)	0.0 (0.0%)	33.0 (9.0%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (100.0%)		Minimum SA: >= 40% requirement for AACSB met (91.0%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (91.0%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Total MSOD			7	0	533.0 (94.2%)	0.0 (0.0%)	0.0 (0.0%)	33.0 (5.8%)	0.0 (0.0%)
			>= 60% requirement for P for AACSB met (100.0%)		Minimum SA: >= 40% requirement for AACSB met (94.2%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (94.2%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (100.0%)				
Faculty Portfolio			Faculty Sufficiency		Percent of Time Devoted to Mission for Each Faculty Qualification Group				
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Productivity (P)	Supporting Faculty Productivity (S)	Scholarly Academic (SA)	Practice Academic (PA)	Scholarly Practitioner (SP)	Instructional Practitioner (IP)	Other (O)
Grand Total			191	58	6842.0 (60.3%)	1004.0 (8.8%)	186.0 (1.6%)	2549.0 (22.5%)	766.0 (6.8%)
			>= 75% requirement for P for AACSB met (76.7%)		Minimum SA: >= 40% requirement for AACSB met (60.3%) Minimum SA + PA + SP: >= 60% requirement for AACSB met (70.8%) Minimum SA + PA + SP + IP: >= 90% requirement for AACSB met (93.2%)				
Faculty Sufficiency Indicators:					Faculty Qualification Indicators:				
<ul style="list-style-type: none"> <li>Overall: P/(P+S) &gt;= 75%</li> <li>By discipline, location, delivery mode, or program: P/(P+S) &gt;= 60%</li> </ul>					<ul style="list-style-type: none"> <li>Minimum SA: (SA)/(SA + PA + SP + IP + O) &gt;= 40%</li> <li>Minimum SA + PA + SP: (SA + PA + SP)/(SA + PA + SP + IP + O) &gt;= 60%</li> <li>Minimum SA + PA + SP + IP: (SA + PA + SP + IP)/(SA + PA + SP + IP + O) &gt;= 90%</li> </ul>				

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**AACSB Table 15-2: DEPLOYMENT OF PARTICIPATING AND SUPPORTING FACULTY BY QUALIFICATION STATUS IN SUPPORT OF  
DEGREE PROGRAMS FOR THE MOST RECENTLY COMPLETED NORMAL ACADEMIC YEAR USING COURSES TAUGHT**  
Date Range: September 1, 2015 - December 31, 2015

	Percent of teaching (measured by courses taught)					
	Scholarly Academic (SA) %	Practice Academic (PA) %	Scholarly Practitioner (SP) %	Instructional Practitioner (IP) %	Other (O) %	Total %
<b>BSBA: Hilltop</b>	51.32%	9.87%	2.63%	30.26%	5.92%	100%
<b>BSBA</b>	<b>51.32%</b>	<b>9.87%</b>	<b>2.63%</b>	<b>30.26%</b>	<b>5.92%</b>	<b>100%</b>
<b>BSM: Pleasanton</b>	0%	25%	25%	25%	25%	100%
<b>BSM: Sacramento</b>	50%	25%	0%	25%	0%	100%
<b>BSM: San Francisco-Downtown</b>	11.11%	22.22%	0%	33.33%	33.33%	100%
<b>BSM: San Jose</b>	16.67%	0%	0%	33.33%	50%	100%
<b>BSM: Santa Rosa</b>	0%	0%	0%	100%	0%	100%
<b>BSM</b>	<b>16%</b>	<b>16%</b>	<b>4%</b>	<b>36%</b>	<b>28%</b>	<b>100%</b>
<b>EMBA: San Francisco-Downtown</b>	80%	10%	0%	10%	0%	100%
<b>EMBA</b>	<b>80%</b>	<b>10%</b>	<b>0%</b>	<b>10%</b>	<b>0%</b>	<b>100%</b>
<b>MBA: San Francisco-Downtown</b>	62.16%	13.51%	2.7%	18.92%	2.7%	100%
<b>MBA</b>	<b>62.16%</b>	<b>13.51%</b>	<b>2.7%</b>	<b>18.92%</b>	<b>2.7%</b>	<b>100%</b>
<b>MSFA: San Francisco-Downtown</b>	88.89%	0%	0%	11.11%	0%	100%
<b>MSFA</b>	<b>88.89%</b>	<b>0%</b>	<b>0%</b>	<b>11.11%</b>	<b>0%</b>	<b>100%</b>
<b>MSOD: Pleasanton</b>	100%	0%	0%	0%	0%	100%
<b>MSOD: San Francisco-Downtown</b>	80%	0%	0%	20%	0%	100%
<b>MSOD</b>	<b>85.71%</b>	<b>0%</b>	<b>0%</b>	<b>14.29%</b>	<b>0%</b>	<b>100%</b>

1. Provide information for the most recently completed normal academic year. Each cell represents the percent of total teaching (whether measured by credit hours, contact hours, courses taught or another metric appropriate to the school) for each degree program level by faculty qualifications status. The sum across each row should total 100 percent. Provide a brief analysis that explains the deployment of faculty as noted above to mission, expected outcomes, and strategies.

**APPENDIX 5**

**Characteristics of Graduate Students Admitted in Fall 2015**

2015 Graduate Class Profiles:

FTMBA	
Term	Fall 2015
Entering Class	58
Average GPA	3.14
Average GMAT/GRE	559/302
Average TOEFL/IELTS	100/6.8
Average AGE	28
Age Range	22-37
Average years WE	3.3
# Domestic Minority	11
% Domestic Minority	37%
# International students	28
% International students	48%
# female	25
% female	43%
Top Industries represented	Financial Services (10)
	Technology (9)
	Healthcare (6)
	Government (4)
Top countries represented (PR Country)	United States (30)
	India (6)
	China (5)
	Saudi-Arabia (3)
Top cities represented (PR City)	San Francisco (10)
	Mumbai (3)
	Ho Chi Minh/Riyadh (2)
PTMBA	
Term	Fall 2015
Entering Class	32
Average GPA	3.16
Average GMAT/GRE	543/309
Average TOEFL/IELTS	104/N/A
Average AGE	30
Age Range	24-45
Average years WE	6.1
# Domestic Minority	9
% Domestic Minority	29%
# International students	1
% International students	3%

# female	15
% female	47%
<b>Top Industries represented</b>	Technology (7)
	Financial Services (4)
	Education (3)
<b>Top countries represented (PR Country)</b>	United States (31)
	South Korea (1)
<b>Top cities represented (PR City)</b>	San Francisco (14)
	Alameda/Daly City/Foster City/Hayward/Oakland (2)
<b>MGEM (USF ONLY)</b>	
<b>Term</b>	<b>Fall 2015</b>
<b>Entering Class</b>	16
<b>Average GPA</b>	3.14
<b>Average GMAT/GRE</b>	N/A
<b>Average TOEFL/IELTS</b>	N/A
<b>Average AGE</b>	26
<b>Age Range</b>	22-32
<b>Average years WE</b>	1
<b># Domestic Minority</b>	11
<b>% Domestic Minority</b>	69%
<b># International students</b>	2
<b>% International students</b>	13%
<b># female</b>	9
<b>% female</b>	56%
<b>Top Industries represented</b>	Technology
	Entertainment
	Healthcare
	Hospitality
	Non-Profit
	Real Estate
<b>Top countries represented (PR Country)</b>	United States
	Afghanistan
	Iran
	Belgium
<b>Top cities represented (PR City)</b>	
<b>MSFA</b>	
<b>Term</b>	<b>Fall 2015</b>
<b>Entering Class</b>	62

Average GPA	3.11
Average GMAT/GRE	563/303
Average TOEFL/IELTS	91
Average AGE	25
Age Range	22-33
Average years WE	1
# Domestic Minority	2
% Domestic Minority	3%
# International students	50
% International students	81%
# female	27
% female	44%
Top Industries represented	Financial Services
	Education
	Consulting
	Hospitality
	Real Estate
	Retail
Top countries represented (PR Country)	China
	United States
	Canada
	Italy
Top cities represented (PR City)	
<b>MNA</b>	
Term	<b>Fall 2015</b>
Entering Class	21
Average GPA	3.03
Average GMAT/GRE	n/a
Average TOEFL/IELTS	n/a
Average AGE	39
Age Range	24-68
Average years WE	11.5
# Domestic Minority	8
% Domestic Minority	38%
# International students	0
% International students	0
# female	18
% female	86%

<b>Top Industries represented</b>	Non-profit (9)
	Education (3)
	Consulting (2)
	Healthcare (1)
<b>Top countries represented (PR Country)</b>	United States (21)
<b>Top cities represented (PR City)</b>	San Francisco (5)
	Oakland (2)
<b>MSOD</b>	
<b>Term</b>	<b>Fall 2015</b>
<b>Entering Class</b>	32
<b>Average GPA</b>	3.36
<b>Average GMAT/GRE</b>	n/a
<b>Average TOEFL/IELTS</b>	n/a
<b>Average AGE</b>	35
<b>Age Range</b>	26-56
<b>Average years WE</b>	8.5
<b># Domestic Minority</b>	10
<b>% Domestic Minority</b>	31%
<b># International students</b>	0
<b>% International students</b>	0
<b># female</b>	23
<b>% female</b>	72%
<b>Top Industries represented</b>	Technology (10)
	Education (5)
	Healthcare (4)
	Consulting (3)
	Financial Services (2)
	Retail (2)
	Consumer Products (1)
	Energy/Clean-tech/Oil(1)
	Government (1)
<b>Top countries represented (PR Country)</b>	United States (32)
<b>Top cities represented (PR City)</b>	San Francisco (17)
	Oakland (3)
	Brentwood (2)

MPA - SF	
Term	Fall 2015
Entering Class	31
Average GPA	2.99
Average GMAT/GRE	n/a
Average TOEFL/IELTS	n/a
Average AGE	34
Age Range	23-68
Average years WE	6.9
# Domestic Minority	23
% Domestic Minority	74%
# International students	0
% International students	0
# female	21
% female	68%
Top Industries represented	Education (8)
	Government (5)
	Healthcare (6)
	Non-profit (6)
	Consulting (1)
	Financial Services (1)
	Legal Services (1)
Top countries represented (PR Country)	United States (31)
Top cities represented (PR City)	San Francisco (7)
	Oakland (3)
	Petaluma (2)
	Millbrae (2)
MPA - Sacramento	
Term	Fall 2015
Entering Class	8
Average GPA	3.36
Average GMAT/GRE	n/a
Average TOEFL/IELTS	n/a
Average AGE	30
Age Range	25-43
Average years WE	5
# Domestic Minority	3
% Domestic Minority	38%
# International students	0



<b>% International students</b>	0
<b># female</b>	5
<b>% female</b>	63%
<b>Top Industries represented</b>	Education (2)
	Government (3)
	Healthcare (1)
	Military (1)
	Non-profit (1)
<b>Top countries represented (PR Country)</b>	United States (8)
<b>Top cities represented (PR City)</b>	Sacramento (5)
	Elk Grove (2)
<b>MSIS</b>	
<b>Term</b>	<b>Fall 2015</b>
<b>Entering Class</b>	18
<b>Average GPA</b>	3.1
<b>Average GMAT/GRE</b>	N/A/316
<b>Average TOEFL/IELTS</b>	N/A
<b>Average AGE</b>	35
<b>Age Range</b>	25-53
<b>Average years WE</b>	6
<b># Domestic Minority</b>	10
<b>% Domestic Minority</b>	56%
<b># International students</b>	0
<b>% International students</b>	0
<b># female</b>	2
<b>% female</b>	11%
<b>Top Industries represented</b>	Technology
	Consulting
	Education
	Energy/CleanTech
	Financial Services
	Government
	Healthcare
	Military
<b>Top countries represented (PR Country)</b>	United States
<b>Top cities represented (PR City)</b>	

**APPENDIX 6**  
**Task Force Strategic Priorities, 2015-2016**

School of Management Strategic planning timeline thus far:

Jan. 21, 2015 - **Appreciation of the Who, What, and How of the School of Management for the Next 5 Years**

- SOM Leadership Retreat (Review in Appendix 6)

Jan. 27, 2015 – **SOM Faculty/Staff Meeting**

- Leadership Group Teams recapped retreat and reported on action steps to entire school.

Feb. 6, 2015 – **SOM Connected Conversation / The Ideal School of Management: Strategic Priorities & Task Forces**

- Entire school invited to ½ day retreat to expand on the conversation on building the best possible USF School of Management started at the SOM Leadership Team Retreat
- Strategic Task Force groups formed. (See Appendix 6)

Apr 13, 2015 - **SOM Faculty/Staff Meeting**

- Each task force to revisit action plans and continue to build on them, especially with respect to their priorities for next year.

Jun 15, 2015 – **1<sup>st</sup> Strategy Group Meeting /Strategic Thinking Retreat**

- Initial Gathering of small focus group. 10 faculty & staff.
- Continuation of strategy thinking during the summer; specifically build a bigger picture.
- SWOT analysis (in Appendix 6)

Sep 25, 2015 – **2<sup>nd</sup> Strategy Group Meeting /Strategic Thinking Retreat**

## SCHOOL OF MANAGEMENT RETREAT(S) RECAP: STRATEGIC PRIORITIES

THE IDEAL SCHOOL OF MANAGEMENT: STRATEGIC PRIORITIES & TASK FORCES



2/9/2018

### ***The Ideal School of Management: Strategic Priorities & Task Forces***

The School of Management Faculty and Staff spent an afternoon building on the previous work of the SOM Leadership Team of Program Directors, Chairs, and Staff/Operations Directors. Pictures generated by retreat members of the Ideal SOM, followed by Strategic Priorities for the School and finally a listing of Task Forces are below. Slide decks from both retreats are in Appendix A.

### SOM Leadership Team Retreat – January 21, 2015



If you had the power to create the *best possible USF School of Management*, what would it look like?

## SOM "Connected Conversations" Half-Day Retreat – February 6, 2015



Ideal School of Management Revisited: If you had the power to create the *best possible* USF School of Management, what would it look like? Discuss the following questions with your colleagues at your table: What do you identify with? What is missing? What would you add? If you were to create your own picture, what would it look like?

### Strategic Priority Team Task

- Find a table, appoint a recorder and reporter for your team
- Give your Priority a name
- Discuss/prioritize the most important issues related to your strategic issue
- Build a Plan of Action

### Strategic Priority Taskforces (as of 2/6/2015)

#### Developing Distinctive Products to Embody a Constant Theme of Social Innovation and Capacity Development

Vanessa George\*  
Margot Frey  
Marco Tavarzi  
Alissa Gossett  
Don Grant  
Joo Hyung He  
Nicholas Tay

#### (Enforcement of) Accountability for Faculty/Staff

Nel Wache\*  
Tony Palino  
Mikaela Hinds  
Lynette Ferguson  
Jane Gleason  
Carol Graham  
Mind Mysliwiec

#### Improving the Student Experiences through the Student Life Cycle Admissions

LaShaunda Smaw\*  
Cina Akenez  
Kathy Kane  
Lauren Ognibene  
Aja Gamburg  
Leslie Bakeman  
Tom Maier  
Stephen Huxley

**Creating a Culture of Openness, Engagement, and Transparency**

Kiana Salazar-Thompson\*

Anne Yumang

Ko Odaither

Simone Jordan

Wilma Kay

Francisco Gamez

Keith Hunter

Xizhuo Yang

Emi Grogan

Robert Menjivar

Jo-Elan Radetch

**Culture of Engagement - High Performance through Value Driven Behaviors**

Daryl Cook\*

Stythe Hurley

Michelle Owen

Paul Ryder

Tom Grossman

Mike Collins

Kevin Lo

**The Schools' Role in Solving the World's Problems**

JP Allen\*

Serga Poole

Todd Sayre

Ludwig Chincaim

**Closed Loop Management of Teaching Qualities**

Barry Doyle\*

Rich Callahan

Vijay Mehrotra

**The Who + What of SOM**

Katherine Green\*

Mouaffac Sidani

Valerie Gonzalez

Kelly Tarr

Sarah Slater

Leura Camara

**Regional Campus Development**

Tony Ribera\*

Ron Harris

Oleg Nikhenko

Maria Gunn

Larry Brewster

\* Point of Contact



## Action Plans

- Who else needs to work with your team in order to accomplish your plan?
- For each individual on your team, what will s/he do to achieve the plan?
- Specific goals, tasks/assignments, resources needs, and time tables for accomplishment.
- What other information is needed to appreciate/understand your plan.

## Next Steps

- Turn Actions Plans into results:
  - Create a Task Force
  - Work to refine your plan by early March
  - Submit and share your plans for review
  - Prioritize plans
- Reach out and Involve other key stakeholders
- Incorporate conclusions from Aslanian Report(s), other data
- Action Plans to be shared with the Strategic Commission in mid - March

## Slide Deck: SOM Leadership Retreat

### Hallucination Appreciation of the Who, What and How of the School of Management for the Next Five Years

January 21, 2015



### Outcome(s) for the Day

- Identify at least five important areas we will address to bridge the gap between the USF SOM potential and today's realities.
- Plans for these areas to include...
  - Steps to achieve plan.
  - Additional information to be gathered.
  - Other participants to be included.
  - Key stakeholders to be influenced.



### Individual Task

If you had the power to create the best possible *USF School of Management*, what would it look like?

You can take any perspective, as broad or as narrow as you like, including the role of the School within the university, the way you run, etc., and the relationships with stakeholders. What are today's realities that the School needs to take in order to bring about the potential you envision? *Identify at least one such reality, making your selection from any perspective you choose: personal, professional, individual, theoretical, etc.*



### Individual Task: Marketplace

Considering all the reported potentialities and realities, what do you believe is the most important area that needs to be addressed in order to bridge the gap between the USF SOM potential and realities it faces?

- Take a piece of 8.5 x 11 sheet of paper:
- Write your name at the top of the piece of paper.
  - Write the title of your idea.
  - Take it to the "Marketplace for Ideas".



### Final Report Outs, Next Steps

The final report outs are to focus on the:

- **Actions** you have the power to implement.
- **Actions** you will take to influence others, including recommendations your team will make to others with whom you have no influence.

Each Topic Affinity Group completes one Action Plan Summary.



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### Action: Culture of Engagement

- Create mechanism to allow inequalities to be addressed.
- Engage all faculty and staff in SOM: How to have "difficult conversations".



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**Action: Curriculum Designed to Provide Value to Employers**

- Focus on experiential learning and professional development.
- Form advisory boards (or similar).
- Engage faculty, staff, students, outside interests.
- Create curriculum/programs that meet needs of business.



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**Action: Developing Distinctive 'Products'**

- Evaluate success with internal and external metrics that matter.
- Determine differentiators; be distinctive.
- Offer programs/niche that intersect with market demand.
- Define what our new story will be.



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**Action: Student Quality/Alignment of Learning Resources**

- "Strong start": memorable first experience.
- Enhance teaching quality: sharing experiences, training, experiential learning.
- Market graduate programs (interviews, other).
- Integrate technology use in classroom.



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**SOM NEXT STEPS**

- Faculty/Staff Retreat: February 6, 12p-5p, UM 100
  - Extending our associations
  - Understanding our priorities
  - Building action plans
- Data from the Market: 2/28 - 3/6
- Consult more stakeholders (including Trustees, Alumni): 3/15-30
- Craft the Strategy



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## Slide Deck: SOM Half-Day Retreat

### Hallucination Appreciation of the Who, What and How of the School of Management for the Next Five Years

February 6, 2015



### Appreciation not Hallucination

OSBERT by Scott Adams



Welcome





### Agenda

- Overview of the Day
- 12:15 – 1:00p – Gallery View, Lunch, Table Discussion
- 1:00 – 1:30p – Lunch Table Report Out
- 1:30 – 1:45p – The Marketplace
- 1:45 – 2:30p – Strategic Priority Discussions
- 2:30 – 2:45p – Break
- 2:45 – 3:30p – Action Plan(s) Development
- 3:30-4:00p – Action Plan Report Out
- Host Share
- 4:00-5:00p – Celebrate!



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### Expectations/Purpose for the afternoon

- Dream big... build ideas, reach.
- Have fun... build community.
- Prioritize... build reality from potential.



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### Outcome(s)

- Establish realistic and specific strategic priorities and action plans that will bridge the gap between the USF SOM potential and today's realities.
- Create Plans that reflect our commitment to...
  - Engagement
  - Impact
  - Innovation

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### Lunch Task

#### Travel the Gallery – Grab lunch

Study the pictures in the back of the room

**Creative Representations  
of  
the best possible  
School of Management**

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### Table Discussion

- Find and join your table (you have a number).
- Assign a recorder/reporter for your group to report out.
- Discuss the following questions with your colleagues at your table:
  - What do you identify with?
  - What is missing?
  - What would you add?
  - If you were to create your own picture, what would it look like?

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### The Marketplace

- Consider the Table Report Outs.
- Reflect on the four strategic priority areas already identified at the SOM Leadership Retreat.

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### 'Current' Strategic Priorities

- Culture of Engagement
- Curriculum Designed to Provide Value to Employers
- Develop Distinctive 'Products'
- Student Quality/Alignment of Learning Resources

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### The Marketplace

Now reflect and identify what you believe is the *most important strategic priority* that needs to be addressed in order to bridge the gap between the potential and realities of the School of Management.

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### The Marketplace

- Get a piece of paper.
- Write your name on it.
- Identify your priority and take it to the Marketplace // or //
- Join an existing SOM priority.
- Recruit and build a Team.

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### Strategic Priority – Team Task

- Find a table, appoint a recorder/reporter for your team.
- Give your Strategic Priority a name.
- Discuss and prioritize the most important issues related to your Strategic Priority.
- Build a Plan of Action.

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### Action Plans

- Specific goals, tasks/assignments, resources needed, and timetables for accomplishment.
- What other information is needed to appreciate/understand your plan.
- Who else needs to work with your team in order to accomplish your plan?
- For each individual, what will you do to achieve the plan?

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### Next Steps

- Turn Action Plans into results:
  - Create a Task Force
  - Work to refine your plan by early March
  - Submit and share your plans for review
  - Prioritize plans
- Reach out and involve other key stakeholders.
- Incorporate conclusions from Asianian Report(s) and other data.
- Action Plans to be shared with the Strategic Commission in mid-March.

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SCHOOL OF MANAGEMENT TASK FORCES/STRATEGIC PRIORITIES 2015-2016				
ACTION PLANS 2015-2016				
(*) Point of Contact for Team				
Creating a Culture of Openness, Engagement, and Transparency – Yumang, Grogan, Gamez, Radetich, Boedecker, Hunter, Salazar-Thompson*, Odsather, Menjivar, Jordan, Kay, Yang				
Specific Goals	Tasks/Assignments	Resources/Budget (\$)	Implementation Timeline	Notes
Improve transmission of communication from the top down	Launch a monthly newsletter from the SOM Dean's office detailing updates and policy changes Provide regular feedback Close the loop Communicate policy changes at USF and SOM levels to those affected Timeliness in decision-making and communications Communicate with clarity Reply with a yes or a no Communicate in writing Set clear expectations Communicate shifting expectations Ensure employees understand their roles in the communication process	Require commitment and time from leadership	Immediately but will involve ongoing commitment	
Create and promote mentorship opportunities for faculty and staff	Help link employees with mentors in the organization Create opportunities for faculty and staff to express their professional interests to where employees with aligned interests and skills can start a dialogue Can be embedded in the performance appraisal process	Financial resources to host networking events Budge to be allocated at the discretion of the Dean	First event for Summer 2015	
Foster a work environment of mutual respect among employee groups	Provide opportunities for faculty and staff to know each other outside of their regular roles Host educational "Lunch and Learns" (e.g. faculty/staff to present to each other on a topic.) Promote professional development and make it accessible to all employees Celebrate faculty and staff accomplishments	Time and financial resources Budget to be allocated at the discretion of the Dean	First event for Summer 2015	
Communicate and develop transparent and equitable processes for resource allocation and compensation	Establish criteria for the allocation of resources and compensation Create an equitable and regular procedure for the request of additional resources Can be embedded in annual budget-setting process Equitable distribution of compensation to ensure legal compliance	Require commitment from leadership, USF central offices, and research into best practices	Immediately implement, but will involve ongoing commitment	

**Regional Campus Development – Brewster, Gunn, Harris, Nikitenko, Ribera\*, and Whiting**

<u>Specific Goals</u>	<u>Tasks/Assignments</u>	<u>Resources/Budget (\$)</u>	<u>Implementation Timeline</u>	<u>Notes</u>
Minimize number of students per cohort (perhaps 12)			Meeting with Mike Webber, recommendations to follow  June Madsen Clausen is coordinating campus-wide survey for branch campus faculty teaching experience. Ron Harris is on the committee and will act as liaison	
Improve service through better coordination and accountability			“	
Aggressive interaction with SOM Graduate Advisors, CASA or other resources to ensure comprehensive student services			“	
Designate a liaison officer on the Hilltop (Ron Harris)			“	

**Culture of Engagement - High Performance through Value Driven Behaviors – Collins, Cook\*, Grossman, Hurley, Lo, Owen, Ryder**

<u>Specific Goals</u>	<u>Tasks/Assignments</u>	<u>Resources/Budget (\$)</u>	<u>Implementation Timeline</u>	<u>Notes</u>
Data Search	Formal request for quote from Kenefick Consulting	External Consultant	1 Semester	
Engage a cultural change process	Cross-Reference Aslanian data with results from consultants Narrow the definition of the University's values		Ongoing	
Other information: Culture study to gain a deeper understanding of arrant values and behaviors that create a culture of disengagement. Deeper appreciation for where we are engage and how that is enabled. Who else needs to work with your team in order to accomplish your plan? What are the joint roles and responsibilities? We will need to form a new or keep the current steering committee to work with external consultants. After the findings are reported, we will need the support of leadership to instill a set of behaviors congruent.				



Improving the Student Experiences through the Student Life Cycle Admissions – Alvarez, Blakeman, Gamburg, Guerrero, Huxley, Kane, Maier, Ognibene, Smaw*				
Goals	Tasks/Assignments	Resources/Budget (\$)	Implementation Timeline	Notes
Align interests and assess aptitude	<p>Undergraduate –</p> <p>Aptitude testing to help students align their majors with their natural aptitudes on an individual basis. Have our students take them twice - once as freshman, once as sophomores.</p> <p>Action: Offer students some form of personality assessment at Orientation. Provide students with ongoing support to improve English skills. Involve Dorothy to inquire more on process in terms of conditional admissions.</p> <p>Graduate –</p> <p>Interviews</p> <p>Graduate Admission: Determine a strategy to provide additional support to improve communication skills; assess need based on English proficiency exam or as identified needing support by faculty. Interviews: MBA, MGEM, MSOD: Starting this year, all students are interviewed. Action: MSFA, MNA, MPA: Interviews may be requested. GR Conditional Admissions policy already in place: business comm. skills course required if TOEFL 92-99 iBT/IELTS 6.5. FT MBA: additional writing lab requirement, based on GMAT AWA score.</p>	<p>3<sup>rd</sup> part performing a managerial aptitude test - \$1000 annual subscription <a href="#">CCAT/Employee Personality/Manager aptitude test</a></p> <p>Give aptitude testing in freshman and sophomore classes (for faculty who are teaching Business 101 class plus one of the 200 level core courses (i.e. 201 or 2014))</p> <p>Conditional Admissions</p>	Fall 2016	
Orientation more robust	<p>Intro Jesuit Values</p> <p>Job Preview and Panel</p> <p>Undergraduate Action: Department breakouts - Offer students some form of personality assessment (i.e. Personal Analysis Assessment) at Orientation</p> <p>Graduate Action: Offer Faculty/Industry Panel Session at Orientation.</p>	<p>USF 101 – 1 Credit offered in Fall 2015</p> <p><a href="http://www.usfca.edu/usf101/">http://www.usfca.edu/usf101/</a></p> <p>Faculty support</p>	Fall 2015	
Acclimating to School	<p>Freshman Seminar, Bus 101 (return), workshops, tutor seminars</p> <p>Undergraduate Action: Have faculty rotate teaching the Freshman Seminar (BUS 101) so that it is sustainable. -Offer workshops, tutoring, seminars, etc.</p>	<p>Workshops 4 @\$500 per (refreshments)</p> <p>Faculty collaboration</p>	Fall 2016	
Improve classroom experience	<p>Action: Offer additional heightened communication/writing skills to all students. Offer additional training for faculty on addressing cultural diversity and staying relevant and current. Applied research.</p> <p>◦Faculty held responsible and accountable.</p> <p>◦Regarding issues of incoming students with inadequate English skills, we are not serving them as well as we could. Should we have special sections of core courses that have translators who will translate the lectures into other languages?</p> <p>Per Bill Murray of the Graduation Center-</p>	<p>Est: \$4,000</p>	Fall 2016	

	Results of the UgGSS and the GrGSS surveys are not automatically disseminated to schools.			
Renovate the capstone experience	Undergraduate Action: Faculty to redesign the capstone experience to make it more of a culminating experience.	Funds to redesign Faculty stipend to redesign the capstone experience Est. \$3,500 faculty stipends	Fall 2016	
Alumni connection	Undergraduate Currently only Accounting and HM in SOM are a part of the Alumni Mentor Pilot (AMP) program. Overall, there are 67 USF Seniors participating. It includes two signature events and mentor/mentee meetings a minimum of 4 times over the course of the 8-month program. Action: Implement this pilot throughout the other undergraduate majors. Graduate Mentorship program lead met with GBA and SOM Alumni Relations to discuss expanding the program to MBA. Must secure mentors first. Potential roll-out next year. Action: Rollout contingent upon success of	Resources to include all SOM departments No current cost, as this is still a pilot test	Fall 2016	

The Who + What of SOM – Camara, Freeman, Green*, Sidaoui, Tarry					
Specific Goals	Tasks/Assignments	Budget (\$)	Implementation Timeline	Notes	
Represent all administrative departments on the intranet  Designate a position in every department as the individual who is responsible for the material of their department  Designate one person (the Webmaster) be responsible for making sure departments keep the content up to date	School's webmaster should meet with designated individuals in each department twice a year to go over information on the intranet and make sure it is up to date		May 31st		
Build an interactive org chart so that staff and faculty know who to go to for what and know what responsibilities are assigned to a particular position  Org chart would include individuals' responsibilities with pictures	Currently exploring software that could be utilized for this project		July 31st		
Create a Push Notification or App to notify people of when the intranet is updated	Must meet with University ITS				

The School's Role in Solving the World's Problems – Allen*, Chincarini, Poole, Sayre, Villarreal					
Specific Goals	Tasks/Assignments	Budget (\$)	Implementation Timeline	Notes	
Create "Safe Spaces" where faculty of all backgrounds and viewpoints can feel included in an authentic discussion, are willing to propose new ideas, and are willing to subject their ideas to evidence-based discussion	One proposal is to create a metaphorical "think tank" that could provide a safe space Ex. Place for considering and improving a specific short proposal, such as a social justice focused 'honors program'				

Social Innovation (Developing Distinctive Products to Embody a Constant Theme of Social Innovation and Capacity Development) Task Force – George*, Frey, Tavanti, Gossett, Grant, Ha, Tay				
Specific Goals	Tasks/Assignments	Resources/Budget (\$)	Implementation Timeline	Notes
Market Research	Conduct external surveys of market needs, offerings & perceptions of USF: Employers Prospective students Competitors	In process by Aslanian group.	Spring 2015	
Internal Stakeholder Survey & Focus Groups	Conduct internal surveys & focus groups of staff & faculty: Self-perceptions of USF SWOT Feedback on proposed theme of SI Solicit other potential themes	Partly in process by Aslanian group Create survey design team to create separate survey on proposed theme Need faculty & staff support for focus groups	Spring 2015  Summer / Fall 2015	
Assess Results, Confirm Strategy & Develop Preliminary Plan	Review surveys/focus group feedback Determine need for changes / modification in SI theme Obtain prelim approval to move forward on theme from SOM leadership Develop more detailed action plan	Access to internal and external survey results Team support for review GPC, Faculty & Program Director & Dean support	Fall 2015	
Develop & Launch Social Innovation Incubator/Accelerator	Create USF Social Innovation Accelerator Start small with the current projects of our strategic partners (see Appendix A) and scale up by attracting funds and increase the capacity of Social Impact Center / Institute where the accelerator / incubator could be hosted. Support local businesses by providing consulting services to improve Triple Bottom Line and support innovation Develop certificate programs on sustainable social impact.	Identify a champion / Hire or Assign a Director of the Center. Assign support staff Build out the current infrastructure (e.g. 2 <sup>nd</sup> floor of 101 Howard). Need support from Entrepreneurship, Innovation & Strategy Faculty. Budget to market /promote new Center & attract clients	Fall 2015 – Spring 2016	

	Blend students in MBA, MNA, MPA programs and engage in projects / practicums. Promote SI Center in the community and attract start-ups			
Create new Social Innovation Institute	Create USF Social Innovation Institute: Serve as a “think tank” for cutting edge research on social innovation / social impact. Convene conferences & publish peer-reviewed journals on social impact with an ethics/social justice lens Partner with USF Social Innovation Accelerator to provide evidence-based research to inform consulting work.	Hire / Assign a Director of the Institute Need support from Entrepreneurship, Innovation & Strategy Budget to market /promote new Institute	Fall 2016	
Implementation Phase 3: Communication (Marketing, Admissions, Employer Relations)	Launching new re-branding campaign for SOM focusing on SI theme and incorporating theme into the Mission. Promote new theme in Recruiting activities Meet with Employers and share message of new SI orientation	Budget for Marketing campaign Budget for modifying Recruiting/ Admissions materials Budget for creating Employer Relations recruiting materials	Fall 2016 – Fall 2017	

Closed Loop Management of Teaching Qualities – Callahan, Doyle*, Mehrotra				
Specific Goals	Tasks/Assignments	Resources/ Budget (\$)	Implementation Timeline	Notes
GPC best practices	Meet with PD's	Existing PDs, New Grad CTE		
UPC best practices	Meet with UG faculty	Existing faculty, USF CTE		
Timely, constructive feedback to instructor	Institute mid-course and mid-program feedback	Existing faculty forms		
Faculty teaching development, internal	Institute class visits by peer faculty, with feedback	Scheduling staff		
Faculty teaching development, external	Create series of teaching workshops [case teaching workshop proposal in process Regional travel to see excellent presenters	Faculty who write cases Travel funds		
Improve mentoring of faculty to improve teaching effectiveness in relevant programs	DCs/PDs observe and/or oversee faculty to better manage course/program deliver; access to evaluations	USFFA? Schedule expertise		
Additional use of online videos	Catalogue TED Talks and others	Existing faculty use		

A subcommittee of GPC is meeting with PDs to create a list of “best practices”, followed by suggested action plans necessary to implement the best practices. The report of this subcommittee will be available soon, aligning and advancing the work of this task force.

**School of Management  
Strategic Thinking Retreat  
June 15, 2015 – SFH**

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**EXECUTIVE SUMMARY**

Attendees      Dean: Liz Davis  
Associate Deans: Barry Doyle and Richard Stackman  
Incoming Associate Deans: Tony Patino and Peggy Takahashi  
Faculty: Mark Cannice, Michelle Millar, Marco Tavanti, Neil Walsh, Liang Wang,  
Xiaohua Yang,  
Staff: Cheryl Cain, Laura Camara, Danielle Glynn, Lynette Ferguson, Jennifer Ratliff

Purpose  
Continue strategic discussions during the summer; specifically build a bigger picture, and provide suggestions for future action plans.

Key Agenda Items

Focused on the following questions:

- What is our reality? Discuss how the emerging reality fits with the School's current vision and mission.
- What should our future be? What should we be known for? What makes us distinctive? What territory should we stake out? What bets should we be willing to make?
- What framework best captures this future and will give rise to and sustain strategic action?
- What are the next steps?

Next Steps

- Plan additional strategic thinking retreats of no more than 16 people – balanced between faculty and staff, and other key SOM stakeholders.
- Coordinate process for continued SOM stakeholders' involvement in strategic thinking/planning process for the 2015-16 academic year.
- Update School's vision and mission, where necessary, to better reflect current reality and desired future; and update School's strategic priorities.
- Share output of retreat sessions with faculty, staff, Dean's Circle, advisory boards, and other stakeholders. Participants act as messenger for these; act on these ideas where possible.
- Engagement: First we need to spread the message that this will be inclusive; Everyone is encouraged to be part of the process. Second, will each of us go and talk to two people, sit down and get their reactions to continue this discussion and grow engagement and energy? Third, this can be integrated into a full-fledged strategic plan.

Addenda

- #1 List of questions we avoid
- #2 Proposed Framework/Strategic Priority Matrix
- #3 Documents, Task Forces, and Initiatives from 2014-2015
- #4 List of Chronological Notes in the discussion

## Brief Summary of Key Discussion Points

*What should we be doing?* This was asked early. The following captures the essence:  
*Our mission (guiding principle) is to transform students' lives. It is a privilege to do this. We must have an internal client mentality to help us do that. This is a noble pursuit.*

### WHO WE ARE: Strengths/Opportunities:

Jesuit tradition	School of Management -- variety of programs
Location	(vs. just a college of business)
Financially in good shape	Community (alumni, organizations)
Initiatives started or existing	

### STUDENT EXPERIENCE: HOW WE CAN DO BETTER

#### Strengths/Opportunities

Excellent teachers (some)  
Small classes  
International diversity  
Program champions  
Faculty/staff/program directors  
Global network  
Entrepreneurship  
Ethical leadership  
Global perspective (global experience)  
PRME: Principles for Responsible Management  
Education

#### Weaknesses/Threats:

Student overall experience; value for cost?  
Experiential learning; we don't do enough  
Technology (can we keep up?)  
No close ties to industry  
Technology/Outdated teaching methodology  
Building competencies (marketable, employable, life-long learners)  
Lack of Program Differentiation  
Knowledge of our brand (ie-USF/UCSF)  
Rankings (MBA)

### CULTURE: NEEDS FOR IMPROVEMENT

Accountability	Culture of escalation
Governance	How do we line up with city tech?
Lack of cohesiveness/silo	Transparency (information/communication)
Dealing with problems	Collaboration
Job mentality	Inconsistency
Sense of community	Lack of facing the facts
Differentiation	Culture of "it's not my job" lack of customer service orientation
Follow through/continuity/short term	Entitlement
"GAP" model	Union culture
Concerned more about expression management than substance	Territorial behavior

### ADDENDUM #1: What are the questions we avoid?

- How do we create 'excitement'?
- How do we retain talent and keep them engaged?
- Why do we work here?
- How are we rewarding behaviors that should be extinguished?
- We always say we're going to set a standard of excellence but what do we do to motivate people to do it?
- Why aren't all full-time faculty academically qualified?
- Why does it appear that we are back at square one with respect to AACSB?



- o Are we a School that leads or follows?
- o What should the enrollments be for the school and its respective programs?
- o What populations of students should we recruit?
- o How do we identify healthy (and not-so-healthy) programs?
- o How do you/we define expectations, success?
- o What metrics should we focus on?
- o Does the School have a culture of excuses?
- o Is it a lack of a mature governance structure?
- o Are we truly leveraging – in our own unique way – our Jesuit tradition and Bay Area location?
- o How do we define 'standard of excellence'?

#### ADDENDUM #2: Proposed Framework/Strategy Priority Matrix

	Conscious Leadership	Innovation Mindset	Data-Driven Insights <sup>1</sup>
<b>Professional</b> [Experientially Learned]			
<b>Global</b> [Globally Responsible]			
<b>Technological</b> [Tech Savvy]			

<sup>1</sup>There was discussion of an alternative priority: *Informed Decision-making*

#### ADDENDUM #3: Documents, Task Forces, and Initiatives, 2014-15

- o AACSB CIR
- o Hanover Reports
- o Aslanian Report
- o Business Jam
- o Strategic Priority Task Forces
  - ✓ Culture of Openness, Engagement and Transparency
  - ✓ Regional Campus Development
  - ✓ Culture of Engagement: High Performance through Value-Driven Behaviors
  - ✓ Improving Student Experience through the Student Life-Cycle
  - ✓ The Who & What of SOM
  - ✓ SOM's Role in Solving the World's Problems
  - ✓ Social Innovation: Developing Distinctive Products that Embody A Constant Theme of Social Innovation and Capacity Development
  - ✓ Closed Loop Management of Teaching Quality

#### Initiatives Started [S] in 2014-15 or Existing [E]

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>o Harari Gift [S]</li> <li>o Incubator/Accelerator Proposal [S]</li> <li>o Professional Edge [S]</li> <li>o BSBA Redesign [S]</li> <li>o Social Innovation Proposal [S]</li> <li>o MBA Redesign [E/S]</li> <li>o SVI [E/S]</li> <li>o MS in Entrepreneurship [S]</li> <li>o Malloy Group [E]</li> </ul> | <ul style="list-style-type: none"> <li>o BSM Right-Sizing [E]</li> <li>o Family/Small Business/Gellert [E]</li> <li>o Public Service Internship Prog. [E]</li> <li>o Executive Education [E]</li> <li>o China Business [E]</li> <li>o AGI [E]</li> <li>o Business Venture Center [E]</li> <li>o Criminal Justice Center/Law Enforcement [E]</li> </ul> |
|--|--|

#### ADDENDUM #4: Chronological Notes from the Day

Constant challenge of dealing with tenured faculty, who are also unionized, at a private institution.

We build a lot of things but don't stick with them to see if they'll be successful. Short attention span. Continued history of building a program, putting tons of energy in it for several years, then it dies because of apathy or lack of resources; so, you go outside to get that recognition and satisfaction, then your energy, time and efforts are going in a direction away from the University.

We're afraid of failing. We should be ending stuff instead of things dying from apathy. We need conclusive ends to things. For example, the PT MBA where we have 46 applications in spite of this great location. Why aren't we discussing this? Are we missing the boat on something? A lot of things here need to be fixed, programs closed. Is it delivery? content? location?

A fair number of experiments (or just ideas?) have failed here. Supply chain, project management. They're gone.

Successful programs need drivers. The student life-cycle is crucial, and word of mouth is bad. Imagine if every alumnus recommended a program to a potential student? Data says people don't know us, they don't know we're here.

UGs like us when they leave, MBAs don't. Cohorted programs are a different beast as after two years together they can become an angry mob. The Aslanian Report notes cohort learning can be very harmful.

Those working in student services have the hardest job. The whole job is taking complaints. Sometimes it gets to the point where things blow up - we put bad professors back on the schedule. We are constantly backing into a corner. We don't want to create negativity, but we can't fix problems in the classroom. If we focused on fixing what we do when these problems happen, maybe things will change. Negativity spirals from the students. The cohort then becomes the mob. The generation is entitled. Anything that's not alright gets blown up.

What about expectations around feedback? Students don't always have to get their way, but we have a responsibility of fairness and letting them be heard. Students shouldn't always run straight to the dean. There is a culture of escalation - e.g., copying the Provost to get what you want. Is it appropriate for students to go straight to student services for every complaint instead of the professor? Some students are afraid their grades will be lowered if they complain.

It was noted that everything escalates more in this city. We need to create more internal management of culture to deal with complaints.

What you permit creates what happens - if we can put out an "under new management sign" we can change some of the culture. People want a whole different level of performance from the school. It's big, audacious, full of energy. We have to sell it internally.

We can only encourage people so far, but how do we have a punitive response to people who aren't stepping up. We are rewarding people who don't teach on Fridays, who are not academically qualified to teach. There's no consequence to people taking the easy path. At other universities, you don't get promotions or raises if you don't do your job. Here it's embedded in the contract. SOM has a reputation at the University-level for being disengaged and paid too much.

We have to build enough trust in the system. There's no filtering process. How you get through for P&T is very different here than at other institutions.

Faculty should be tied to their disciplines externally. The question is how is it balanced. When it comes at a cost of any ownership in the system.

You can't have the hard conversations here, fire people, shutdown programs, because there's no consequence here.

We will lose talent; we won't keep anyone if this keeps up.

Focus should be directed at the things we do have control over. If we do the AACSB stuff in the right way, we have an ally to make changes in the system. How do we build a quality academic experience, a singular experience for each student? Where is the SOM going to be in that top range? Only 10% of the Schools in the world are AACSB accredited, the 30% in the US. We can use this to develop policies and procedures to ensure academic quality. This should be part of our vision. Why is AoL a drudgery? It shouldn't be; it's about making the student experience the best we can. AoL is not an event; it's a life style. It's up to us how we're going to define how to do that.

This year we've closed some of the gaps. The redesign of the BSBA; the Malloy Group; the MBA redesign; Exec Ed; Professional Edge are all direct outputs. All AACSB related. Why don't people feel that? Why don't they know what we're doing? (Refer to long list of initiatives.)

We're not able to meet the standards we already set. One of our weaknesses is relevancy; another is the threat of the value proposition being challenged.

We are not practicing what they preach. How do we make sure that we don't just talk about it? We want to encourage those who strive for more.

Retaining talent is the #1 priority of many institutions. If young talented people are coming here and leaving, this is a huge concern. We need to put our people on the path to succeed. What can we put into place to keep the young talent, future leaders, at the school? It's also about keeping the talent that's here engaged. People here check out. Some who aren't engage self-select out. If someone is checked out in a department, what do you do? People don't know each other's CVs or teaching evaluations. Chairs don't know what their departments are doing? At other universities they would know.

How can we push for the chairs and program directors to have more of a leadership role in the school? People are reticent about that. There are faulty assumptions in the system. They can be fixed if the school's leadership decides to do something different. One observation: the 'management' issue is coming up more in conversations.

What is strategic focus of the school that will inform the management structure?

Unhealthy programs: What do we do about them? Is there a lack of communication about the 'standing' of programs? How can staff help?

From the current BSBA Redesign process: The UG program is part of the Bay Area business ecosystem. Instead of students coming for four years and then looking for a job at graduation (i.e., become involved in the business ecosystem), the current thinking is to have students engaged in the Bay Area business ecosystem from day one. Experiential education prepares them for these jobs.

How do we get students out into the ecosystem? From an earlier retreat, there was the declaration: "The City doesn't happen without us." The School should be a learning hub within the greater ecosystem. This ecosystem includes the three sectors -- for profit, nonprofit, public.

Transforming our students' lives with transformational programs. The programs are informed by the ecosystem and location, and it projects information and content through research as well as students' engagement. Projects to students: "Come to USF to join the SF ecosystem." Alumni are part of the ecosystem.

We need consensus of what the ecosystem is. Is it the organizational ecosystem? What are the parameters? Are we creating a new ecosystem or feeding into the Bay Area ecosystem? How do you want to play and make a difference in that system? The SOM has an internal ecosystem, which fits in the larger ecosystem. There are connections but they are not visible. There aren't the channels to favor these connections. We don't see the strong connections to the bay area or experiential learning.

Experiential has been elevated as a strategic focus for the school. How do we make theory a reality for people? How do we distinctively design the ecosystem hub that is tied to our own strengths?

Considering the cross-articulation between sectors, we are well positioned to do that. Should we categorize our ecosystem as the fourth sector? The commitment to the fourth sector is a big jump. It has a clear social benefit. It elevates the quality of society at large. How do we know if our students are interested? We're not known for one thing. We have to see how the opportunities would align with the fourth sector idea. Sometimes there are too many options.

We are like Sleeping Beauty waiting for the princess to wake up. We have a lot of talents but we are still invisible. We have to do something more concrete. Something big.

There are a lot of opportunities for partnerships.

Until we decide what we're good at we don't have a story to tell. It will organize the ecosystem. Part of it is conscious leadership. (Responsible management, sustainability, social innovation. Helped by Jesuit tradition.) Does conscious leadership include global, ethics? Or global could be another strategic area of focus.

Entrepreneurial mindset: creativity, innovation, even in existing organizations there is intrapreneurship. Be a creative problem solver anywhere. Our website doesn't show all the great things we're doing. Building out the network experience in all of our programs would be a game changer. Having a strategy will help us to know where to focus our work and create consistency. If we take "transforming students lives through education"... innovation is broader than entrepreneurship... innovative mindset for problem solving and lifelong learning.

Different schools are known for creating different types of students. What do we want to be known for?

As for global: is it about a global mindset with cultural intelligence. This could be the third part. Experiential is a mechanism for making it live. Is global layered throughout everything?

To market [everything discussed] to potential students and alumni for engagement, we need to think about what this means. We need examples of how these things manifest. How do we build that expression? If we look at the initiatives, they make a number of these live.

How does the students' experience connect? Development just surveyed students about marketing and whether or not that's what they're being taught in the classroom. If we're advertising moral compass but not delivering, where is the disconnect?

Students getting involved in research are also part of experiential learning. That's easy to ramp up with RA support.

Experiential learning is easy to stratify and make sure everyone has a hands-on experience when they come into this ecosystem.

Data-driven decision-making. This brings in some of the departments like finance. You can't be a good problem solver until you can handle data. It's about the judicious use of data, not just the creation of data. This isn't distinctive for us. Holistic decision-making? Systems thinking? This is where our Jesuit tradition comes to the table. Conscious decision-making in the era of big data; enlightened decision-making; informed decision-making.

There isn't room in the curriculum for integration. It's still siloed by the time they graduate with UG or even grad.

USF is a gateway for international students to America. For domestic we're a gateway to the rest of the world (e.g. AGI, MGEM, CBSL, SVI). We're the educational portal to SF and SV. Global connectivity; global hub. Note: there are a number of international cities but there's only one SV.

How does technology fit into everything we have discussed? Is it thematically integrated into experiential learning? Does it fuel the global portal? For students to have a shot they have to know a certain level of tech. Do they need a 3-month boot camp in coding to get in the door. There are now data boot camps that cost \$15k for 10-12 weeks. We could suggest a minor in computer science.

To be attractive and global we have to have the tech savvy piece. Being in SF and near SV, people expect us to be at the forefront of technology. We have to do the research on what tech knowledge is in demand. If we do this, the faculty has to get trained. If this is going to be a piece of how we'll be known then we have to devote resources. In this next round of faculty searches we can build this. As soon as we hear of the next emerging technology we should have workshops for faculty, staff and students. We could also be teaching tech under conscious leadership with respect to how one uses tech.

Idea: Masters of Management with two tracks – one in entrepreneurship the other in MGEM. Then the tracks could be adjusted.

Is the Salesforce certification a course we bake into the MBA or is it another elective? There are number of different classes you can take. Then they can come train the faculty on how to incorporate this in the classroom.

Technology and delivery and the way we provide the education, e.g., hybrid/online.

Globally engaged or globally responsibility. It ties into conscious leadership.

What about an MBA minor in computer science? Make it part of a program? If we have a prayer at being the gateway to SF, tech is the key. They have to be functional from Day 1 in order to get a job. This could be a structural issue to be tackled. Tech boot camps?

The School needs to tackle the rate for MBA graduating with jobs, which is 20% at graduation and 50% at 90 days. That's a huge piece to an MBA program. All of the students coming here want to know what the 'outcome' is. There are lots of jobs but it's a very competitive market.

We added the question: "Would you recommend this program to someone?" EMBA got 100% for the first time this year.

Related to the BSM rightsizing initiative, we need to do the same thing for the grad programs out in the regions. AACSB can help us with that as leverage. At the university level the pressure is to generate

incremental enrollments. Our challenge is to not drop our standards and not send a contingent out to teach 6 people in a cohort.

As for the rankings, how much are we going to say that the lifecycle of the school is tied to whether or not the MBA lives or dies? So many resources are being deployed for a half-dead program.

What about advertising media buys? Do we have \$ available? Yes, we do. Throwing \$ at it recruitment won't make it better. We need a marketing strategy for the school.

What if we start with the influencers? Those are the ones that will go talk with others and carry this forward. This wouldn't push them into a corner. I've never seen this done here. Chairs and directors could be a part of that but the tone has to be set from the top.

You can't shift the culture without doing a fair share of that. Who here would run the next sessions for 16 people? What's the best mechanism for spreading the word? We have to communicate it in a way people will hear it.

After all these attempts at inclusion there will be those who will still complain about the process. The people who are obstacles aren't ever going to stop being miserable and grim.

It can't just be the Dean. If we aren't all in it doesn't matter what message the Dean spreads.

What gets people excited? Results. We have some things in place. Show the results and the link and then they'll have more excitement.

Engagement vs. invested is important. We must be clear about the support we'll give them (e.g., a pool of funding to help people become tech savvy). We can begin these things to catalyze some movement.

Who is going to get on the bus?

How different is all this from the vision of the SOM that you envisioned for today?

[NOTE: Text in italics specifically discussed at retreat.]

**SOM Vision.** The School of Management will be one of the premier teaching, research and *networking platforms* for managerial education, one that is regionally anchored, nationally recognized and globally connected.

**SOM Mission.** The School of Management at the University of San Francisco is a *catalyst for change* in business, government and non-profit managerial practice. Through research and teaching that draws on the global diversity and entrepreneurial energy of our region, we educate students to build *more productive and compassionate organizations. We value human dignity and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit.*

## **APPENDIX 7**

### **Proposal for a USF Master of Science in Entrepreneurship and Innovation**

**Proposal for USF Masters of Science in Entrepreneurship and Innovation**

**Draft:** April 14, 2015 EIS Department, USF SOM (Still under development)

USF Masters of Science in Entrepreneurship  
and Innovation

Mentoring & Immersion  
in Silicon Valley

Board  
Advising

Academic  
Foundations

Customized  
Internship

Build & Launch  
New Venture



## **Philosophy**

To develop cadres of entrepreneurial and innovative leaders who help fashion a more humane world through the creation and development of enterprises and products that serve communities around the globe.

### **MS in Entrepreneurship & Innovation Key Elements (so far)**

- Pure Focus on Student Outcomes
- Key Competencies and Experiences needed for success in entrepreneurship and innovation
- Curriculum designed from ground up focusing on key competencies for success in EIS
- Student Cohort (est. 20) recruitment and screening is key to ensure placement into viable internships
- Full time with approximately 36 units
- 12 month duration with 3 modules
- Academic Foundations: months 1 – 4
- Internship focus on innovation: months 5 --- 8
- New Venture launch: months 9 – 12
- Structured Mentoring/coaching throughout (for credit – est. 3 units)
- Development of On---line Professional Portfolio
- Immersion in Silicon Valley Ecosystem throughout

### **Key Outcomes: Competencies and Experiences (still under development by EIS dept.)**

- Key Competencies
- Creativity, Innovation and Design tool set
- Technology competencies for Start---Ups and Enterprises
- Entrepreneurial Strategy, Planning, and Finance abilities
- Entrepreneurial Marketing, Sales, and Analytics skills
- Entrepreneurial Leadership and an Innovative Mindset
- Key Experiences
- Individualized Internship/Practicum that provides foundation for future Career development in chosen field as well as new knowledge to inform new venture creation
- Launch of New Venture to build entrepreneurial capabilities and enhance learning
- Engagement in events in Silicon Valley Ecosystem
- On---going mentoring and coaching

### **Student Recruitment**

- Target Start: Fall 2016: Cohort of 15 – 25
- Mix of backgrounds (e.g. technology, science, arts, social/not---for---profit, family business, public, international)
- Average of 2 – 3 years of work experience upon entering program

- Full time commitment, plan for success, demonstrated entrepreneurial passion and enthusiasm for program
- Assignment of entrepreneurial or executive mentor for each student

**Module 1: Academic Foundations (months 1 – 4)**

- Potential Courses (based on developing needed competencies so students can bring value to internship and launch new venture) (est. 12 units – 2 units each)
- Creativity, Innovation, and Applied Design Tools
- Internet Business Applications
- Entrepreneurial Marketing, Analytics, and Sales
- Product Development
- Rotating Course (Current Technology Tools)
- Entrepreneurial and Executive Mentoring for each student
- Students develop individual plan with mentor
- Students and Silicon Valley Ecosystem Events
- Students begin development of On---line Professional Portfolio

**Module 2: Customized Practicum/Internship (months 5– 8)**

- Individualized Organizational Internship/Practicum according to each student’s aspirations (e.g. corporate, start---up, not---for---profit, public, etc.) (est. 6 --- 8 units)
- Mentorship Continues
- Immersion in Silicon Valley Ecosystem continues
- Continued development of On---line Professional Portfolio
- 2 – 3 courses (4 --- 6 units)
- Entrepreneurial Leadership and Organizations
- Entrepreneurial Strategy, Planning, and Finance
- Corporate Entrepreneurship and Innovation

**Module 3: Launch New Venture (months 9 – 12)**

- Each student or student team plans and launches new venture (commercial or not for profit, etc.) (est. 6 --- 8 units)
- Venture may be informed from previous internship
- Certain milestones of venture must be completed
- (e.g. legal entity, product prototype, market feedback or sales, viable business model, raise initial financing)
- Mentoring continues (move toward career guidance, interviews, etc.) (potential credits to meet milestones?)
- Immersion in Silicon Valley Ecosystem continues
- Continued development of On---line Professional Portfolio
- 2 courses (4 units)
- Entrepreneurial Law (Incorporation, contracts, IP, etc.)
- And choose one elective with other program students

### **Success Metrics**

1. Each student learns key entrepreneurial skills and mindsets
2. Each student has successful internship and launches new venture
3. Each student either gains offer of employment in professional capacity within 3 months of graduation or is leading an entrepreneurial venture
4. Track alumni to measure on---going outcomes:
  1. Venture viability and impact (at 1, 3, 5 years, etc.)
  2. Career development and impact
5. Most alumni come back to mentor future students.
6. By 3rd cohort, demand for program far exceeds target cohort size
7. Significant external recognition for excellence.

### **Needed Resources**

- Program Director – Professional/FT who also teaches in program (6 months prior to 1st cohort start date)
- Program Coordinator – FT (3 months prior to 1st cohort start date)
- Program Director and Coordinator reside within EIS department and may also manage USF downtown ‘entrepreneurship laboratory’
- Additional Faculty Hire in Technology – FT (.5 applied to this program)
- Possibly utilize space in innovation center – either on or off campus – primarily for 3rd module (new venture launch)
- EIS Department Freedom to design, manage, and market program to best serve students without compromise.

Budget	2016	2017	2018	2019
Students	15	18	20	25
Revenue (\$42k)/ student	\$630k	\$756k	\$840k	\$1,050k
Program Director & Program Coordinator	(\$150k)	(\$155k)	(\$160k)	(\$165k)
Marketing	(\$125k)	(\$100k)	(\$75k)	(\$75k)
New .5 Technology FT Faculty	(\$75k)	(\$75k)	(75k)	(\$75k)
Teaching load current FT faculty (1.0) and Adjunct	(\$150)	(\$150k)	(\$150k)	(\$150k)
General Exp.	(\$50k)	(\$50k)	(\$50k)	(\$50k)
Net Income				

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**APPENDIX 8**  
**The Professional Edge Program**

## School of Management Professional Edge Program

**Created and Submitted for Review by Francisco Gamez, Assistant Dean of Undergraduate Studies and Chair of the Professional Edge Task Force**

### Task Force members:

**Faculty Representatives** – Carol Graham, Monika Hudson, & Mouwafac Sidaoui

**SOM Staff Representatives** – Susan Ewens, Lynette Ferguson, Simone Jordan, KO Odsather, & Sarah Steer

**University Campus Representatives** – Juli-Anne Brockway (Career Services), Carla Christensen (Student Leadership and Engagement), Alex Hochman (Career Services), Marci Nunez (Student Leadership and Engagement), & Penny Scott (Library)

### Description

Professional Edge is a four-year co-curricular program to provide business majors the practical skills and knowledge to make a successful transition from student to working professional in today's competitive business world. Beginning in freshman year, students will participate in workshops and activities that will develop their marketable skill sets, provide unique opportunities for professional growth and development, and enhance their capability to secure valuable internships and career options upon graduation. Building on the previous year's acquired skills, the Professional Edge program will give students a competitive advantage that will enable them to keep pace with the challenges facing today's professional workforce.

In addition to the above structures and workshops, we would offer supplemental programming that would highlight our Ignatian foundation with a series of reflective sessions called *The Ignatian Management Exercises*. These reflection sessions would be led by faculty and administrators with experience in Ignatian spirituality and pedagogy where students of all class levels will be posed with a question in management/business to reflect on critically and analyze within the Ignatian spiritual foundation. These sessions may be incorporated within the McLaren Scholars track and be required to promote advanced critical thinking skills and practice within the Jesuit educational tradition of *context, experience, action, reflection, and evaluation*.

### Mission

The Professional Edge Program supports the School of Management's Mission to "educate students to build more productive and compassionate organizations" by providing the tools to thrive in a professional setting, both corporate and nonprofit, while utilizing the "entrepreneurial energy of our region." The School's values of "personal responsibility and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit" are all reinforced by the skills practiced in the Professional Edge Learning Experiences.

# Professional Edge Program

## PROGRAM STRUCTURE

Freshman Year	Sophomore Year	Junior Year	Senior Year
<b>Fall Required Session:</b> Introduction to SOM Majors	<b>Fall Required Session:</b> Internship Basics Session	<b>Fall Required Session:</b> Business Etiquette	<b>Fall Required Session:</b> “Career Services Tune-Up” and Interview Workshop
<b>Spring Required Session:</b> LinkedIn Workshop	<b>Spring Required Session:</b> Business Literacy Workshop	<b>Spring Required Session:</b> Networking Event with Alumni and Students	<b>Spring Required Session:</b> “Beyond Google” – Real world research
<b>2 or more Elective Learning Experience Offerings</b> (select a minimum of 2 from University offerings, Career Services, Library Services, Student Life, Alumni Networking, SF Bay Area Offerings)	<b>2 or more Elective Learning Experience Offerings</b> (select a minimum of 2 from University offerings, Career Services, Library Services, Student Life, Alumni Networking, SF Bay Area Offerings)	<b>2 or more Elective Learning Experience Offerings</b> (select a minimum of 2 from University offerings, Career Services, Library Services, Student Life, Alumni Networking, SF Bay Area Offerings)	<b>2 or more Elective Learning Experience Offerings</b> (select a minimum of 2 from University offerings, Career Services, Library Services, Student Life, Alumni Networking, SF Bay Area Offerings)
<b>100 hours of Internship/Professional Experience</b>			

# Professional Edge Program

## Elective Learning Experiences

(A sampling of possible electives offered through Priscilla A. Scotlan Career Services, Student Life, Gleeson Library, SOM, SF Bay Area.)

<b><u>FRESHMAN YEAR</u></b>	<b><u>SOPHOMORE YEAR</u></b>	<b><u>JUNIOR YEAR</u></b>	<b><u>SENIOR YEAR</u></b>
<b><u>Priscilla A. Scotlan Career Services</u></b> <input type="checkbox"/> How to Craft a Resume and Cover Letter <input type="checkbox"/> Take a Career Assessment <input type="checkbox"/> Take a Skills Assessment <small>Navigating the Career Fair</small> <b><u>Gleeson Library</u></b> <input type="checkbox"/> Library and Career Research Basics <b><u>Student Life</u></b> <input type="checkbox"/> Complete USF 101 <input type="checkbox"/> How to Handle Stress <b><u>School of Management Events &amp; Activities</u></b> <input type="checkbox"/> Major Workshop <input type="checkbox"/> SOM Approved Club Event <input type="checkbox"/> Ignatian Management Exercise <b><u>SF Bay Area</u></b> <input type="checkbox"/> Business/Industry Conference or Expo <input type="checkbox"/> Volunteer Opportunities Related to Field of Study <input type="checkbox"/> Alumni Mentoring Opportunities	<b><u>Priscilla A. Scotlan Career Services</u></b> <input type="checkbox"/> Interviewing Tips and Strategies <input type="checkbox"/> Attend Careers in Finance Event (or similar) <b><u>Gleeson Library</u></b> <input type="checkbox"/> Development of Company Research Skills <input type="checkbox"/> Using Databases <b><u>School of Management Events &amp; Activities</u></b> <input type="checkbox"/> Participate in a Competition <input type="checkbox"/> Volunteer at a Conference <input type="checkbox"/> Complete a Public Service/Public Sector Internship <input type="checkbox"/> SOM Approved Club Event <input type="checkbox"/> Study Abroad/Academic Global Immersion (AGI) <input type="checkbox"/> Ignatian Management Exercise <input type="checkbox"/> Professional Internship <b><u>SF Bay Area</u></b> <input type="checkbox"/> Business/Industry Conference or Expo <input type="checkbox"/> Volunteer Opportunities Related to Field of Study <input type="checkbox"/> Alumni Mentoring Opportunities	<b><u>Priscilla A. Scotlan Career Services</u></b> <input type="checkbox"/> Effective Interviewing Techniques <input type="checkbox"/> Panel Discussions <input type="checkbox"/> Mock Interview Prep <input type="checkbox"/> Attend Career Fair <input type="checkbox"/> Attend Recruitment Event <b><u>Gleeson Library</u></b> <small>Development of</small> <input type="checkbox"/> Conceptual Skills <input type="checkbox"/> Real World vs. Academic Research <input type="checkbox"/> How to Research and Target a Company <b><u>School of Management Events &amp; Activities</u></b> <input type="checkbox"/> Participate in a Competition <input type="checkbox"/> Volunteer at a Conference <input type="checkbox"/> Study Abroad/Academic Global Immersion (AGI) <input type="checkbox"/> Ignatian Management Exercise <input type="checkbox"/> Professional Internship <b><u>SF Bay Area</u></b> <input type="checkbox"/> Business/Industry Conference or Expo <input type="checkbox"/> Volunteer Opportunities Related to Field of Study <input type="checkbox"/> Alumni Mentoring Opportunities	<b><u>Priscilla A. Scotlan Career Services</u></b> <input type="checkbox"/> Meet One-on-one with Career Services <input type="checkbox"/> Effective Interviewing Techniques <input type="checkbox"/> Panel Discussions <input type="checkbox"/> Mock Interview Prep <input type="checkbox"/> Attend Career Fair <input type="checkbox"/> Attend Recruitment Event <b><u>Gleeson Library</u></b> <input type="checkbox"/> Advanced Research Skills <input type="checkbox"/> "Beyond Google" <input type="checkbox"/> How to Use Trade Journals and Industry Specific Tools <b><u>School of Management Events &amp; Activities</u></b> <input type="checkbox"/> Participate in a Competition <input type="checkbox"/> Network with Alumni <input type="checkbox"/> Graduate School Prep Event <input type="checkbox"/> AGI <input type="checkbox"/> Ignatian Management Exercise <input type="checkbox"/> Professional Internship <b><u>SF Bay Area</u></b> <input type="checkbox"/> Business/Industry Conference or Expo <input type="checkbox"/> Volunteer Opportunities Related to Field of Study <input type="checkbox"/> Alumni Mentoring Opportunities



## Student Learning Objectives (SLOs)

Prepares student to:

Transition to a professional presence in the business world

Reconcile theory with practice by connecting relevant experience and academic knowledge

Communicate and engage effectively in a business setting

Collaborate with a diverse workforce to meet the challenges of 21<sup>st</sup> century businesses

SLOs	Description	Benchmark	Examples of Measurable Outcomes
<b>Transition to a professional presence in the business world</b>	Synthesize connections among experiences outside the formal classroom (including life experiences and academic experiences such as internships and study abroad) to deepen understanding of Business and broaden their points of view.	Identifies connections between life experiences and those academic concepts and ideas perceived as similar and related to one's interests. (AAC&U Integrative Learning VALUE Rubric)	<input type="checkbox"/> Internships <input type="checkbox"/> Professional Experiences <input type="checkbox"/> Study Abroad/AGIs <input type="checkbox"/> LinkedIn Profile and Activity (online/professional social media presence)
<b>Reconcile theory with practice by connecting relevant experience and academic knowledge</b>	Synthesizes or draws conclusions by combining examples, facts, or theories from multiple academic fields within Business for real world application.	When prompted, present examples, facts, or theories from various business areas for application to real world issues. (AAC&U Integrative Learning VALUE Rubric)	<input type="checkbox"/> Attend Career Fairs/symposiums/academic competitions <input type="checkbox"/> Leadership Experiences (student leadership, public service/sector internship program, manage SOM event/project) <input type="checkbox"/> Participate in on-campus Interviews or mock interview sessions
<b>Communicate and engage effectively in a business setting</b>	Oral, written, and non-verbal communication to purposefully present knowledge, foster understanding, and/or promote change.	Understands that communication takes many forms and can utilize any combination of these forms to sufficiently convey a central message in an appropriate business setting. (AAC&U Oral Communication VALUE Rubric)	<input type="checkbox"/> Resume Building/Cover Letter <input type="checkbox"/> Business Etiquette <input type="checkbox"/> Business Networking
<b>Collaborate with a diverse workforce to meet the challenges of 21<sup>st</sup> century business</b>	Articulates understanding of cultural differences in verbal/nonverbal communication and is able to skillfully negotiate a shared understanding based on those differences.	Has a minimal level of understanding of cultural differences in verbal and nonverbal communication; is able to negotiate a shared understanding (AAC&U Intercultural Knowledge and Competence VALUE Rubric)	<input type="checkbox"/> Real World Research Workshop <input type="checkbox"/> Team Building Experience (Outward Bound) <input type="checkbox"/> Cross-cultural understanding presentations/lectures

## Implementation:

### 2015-16 Academic Year

We propose at minimum a one year pilot study to ensure the program structure can work within the constraints of USF real estate and available resources before determining if the program should be further developed as a degree requirement for all undergraduate majors within the SOM. A two year pilot would be ideal and desired, but the expectation of a more aggressive timeline was communicated by Associate Dean Stackman.

Implementation would be a soft launch for the Professional Edge Program with optional learning experiences and workshops for all four academic years (Freshman – Senior).

We would evaluate learning experiences, workshops, and sessions to determine what students enjoy and find useful, while evaluating whether or not the experience is beneficial to the professional development of the student.

While an initial framework is built for the soft launch of Professional Edge, the one year pilot would allow continuous improvement of the framework and foundation of the program to increase the sustainability of the program within the limits of USF and SOM resources.

The one year soft launch will also provide time to hire the necessary staff lines required to successfully implement the Professional Edge Program, fine tune learning sessions and offerings, and provide the Dean time to fundraise and fund the project to ensure its success and sustainability.

### 2016-17 Academic Year

Required for newly admitted Freshmen in the Fall 2016 semester where we can tie it directly to their degree evaluation and meet Federal regulatory standards for degree requirements.

Students will be expected to complete 2 required workshops per year and take a minimum of 2 elective workshops per academic year.

100 hours of Internship or Professional Experience is expected of students and will be monitored by both the Manager of Internships and Professional Experience and the Manager of Student Engagement and Assessment. Students will submit an online form indicating their internship or professional experience, the organization where the internship/experience occurred, the name/contact of the supervisor, a short description of what the internship entailed, as well as the number of hours completed for the internship.

We would track student attendance for the required workshops using Mobile Reader technology swiping student ID cards at the door/check-in table. The 2 elective workshops per academic year would be on an honor system, as we do not have the human resources to be at every event on campus to track students physically.

Students would be required to fill out semester Qualtrics surveys to track the dates of attendance for University level workshops offered throughout the academic year, which in turn will produce attendance reports and populate a shadow system tracking database using FileMaker Pro or related University sanctioned software.

To incentivize the Professional Edge Program, the School (in conjunction with the individual student) will create an unofficial co-curricular transcript which is a combination of verified and self-reported documentation that lists the activities students have participated in while enrolled at University of San Francisco. This transcript will require the appropriate software and training within the Undergraduate division, as well as be monitored and updated by the Assistant Director of Student Professional Development and the Manager of Student Engagement and Assessment. This unofficial co-curricular transcript proposal will need to be vetted by the University's Registrar's Office to ensure that we are in compliance with Federal or State policies, as well as all FERPA regulations.

## Opportunities

The Professional Edge Program provides students with the opportunity to expand their skill sets beyond the classroom and provides practical training and experiences to provide a competitive advantage when entering the professional workforce.

By preparing and sending students out in the workforce, it may potentially increase School of Management's visibility/presence in the Bay Area, as well as build and foster relationships with local companies that may support student employment opportunities.

The Professional Edge Program provides students with the opportunity to integrate and synthesize their classroom knowledge and apply it to real world related experiences to broaden their marketable skill sets.

Students will have an unofficial co-curricular transcript to supplement their resumes and official transcripts when marketing themselves for employment opportunities in their chosen fields.

## Barriers

Logistically, running the program for over 2000 undergraduate BSBA students creates a challenge to the current Undergraduate Studies and Programming Unit's staffing structure. With only 4 employees (2 of which are restricted OPE employees), it makes it difficult to track and implement programming that can potentially run past a 7.5 hour work day and require work after hours/weekends.

Space on campus is extremely limited, as well as event space with a capacity of 500+ guests. With each class level consisting of over 500 students, booking and finding space like McLaren Complex to host workshops and networking events is proving challenging. There is push back from the Events Management team when we try to reserve event space, as they do not want the SOM to dominate all available large scale event space on campus.

Student time, as students have a limited "free time" to develop professionally, while attending school full-time, studying, working a part-time job, and interning within their field of study.

The current undergraduate budget and staffing infrastructure cannot support or sustain the Professional Edge Program. Significant budgetary and staffing resources will need to be built into the Undergraduate Unit for the Professional Edge Program to be successful and sustainable for future years.

## Involvement

### Participants/Stakeholders

**Student Leadership Advisory Board Focus Group**

**Undergraduate Student Alumni Focus Group**

**Professional Edge Task Force: Chair:**  
Francisco Gamez

**Faculty Representatives** – Carol Graham, Monika Hudson, & Mouwafac Sidaoui

**SOM Staff Representatives** – Susan Ewens, Lynette Ferguson, Simone Jordan, KO Odsather, & Sarah Steer **University Campus**

**Representatives** – Juli-Anne Brockway (Career Services), Carla Christensen (Student Leadership and Engagement), Alex Hochman (Career Services), Marci Nunez (Student Leadership and Engagement), and Penny Scott (Library)

### Research

**NASPA Conference Participation** (Student Affairs Administrators in Higher Education)

**AAC&U VALUE Rubrics** - Association of American Colleges and Universities

**Learning Reconsidered 2** - American College Personnel Association, Association of College and University Housing Officers – International, Association of College Unions – International, National Academic Advising Association, National Association for Campus Activities, National Association of Student Personnel Administrators, and National Intramural-Recreational Sports Association (ACPA, ACUI, NACA, NACADA, NASPA, and NIRSA)

**Professional Competency Areas for Student Affairs Practitioners** (ACPA and NASPA)

<b>NASPA Presenters on Co-Curricular Programming and Assessment, internships, and collaborative programming (various sessions)</b>	<b>Title</b>
<b>Boston College</b>	<b>Barbara Jones, Ph.D., Vice President for Student Affairs</b>
<b>Chronicle of Higher Education</b>	<b>Beckie Supiano, Staff Reporter</b>
<b>CSU, Long Beach</b>	<b>Susan Platt, Ph.D., Executive Director Testing, Evaluation, and Assessment</b>
<b>Curran Consulting Group</b>	<b>Sheila Curran, President and Chief Strategy Officer</b>
<b>Denison University</b>	<b>Julie Tucker, Director of Research and Student Development</b>
<b>DePaul University</b>	<b>Ellen-Meents-Decaigny, Ph.D., Assistant Vice President of Planning, Operations, and Assessment</b>
<b>Georgia Southern University</b>	<b>Rachel Eike, Ph.D., Assistant Professor</b>
<b>Oklahoma State University</b>	<b>Kathryn Gage, Ph.D., Executive Director Student Affairs</b>
<b>St. John's University</b>	<b>Kathryn Hutchinson, Ph.D., Vice President for Student Affairs</b>
<b>Saint Louis University</b>	<b>Leanna Fenneberg, Ph.D., Assistant Vice President for Student Development</b>
<b>Stetson University</b>	<b>Lua Hancock, Ed.D., Vice Provost for Campus Life and Student Success</b>
<b>University of California, Irvine</b>	<b>Margueritte Bonous-Hammarth, Ph.D., Director of Assessment, Research, and Evaluation</b>
<b>University of Illinois, Chicago</b>	<b>Mark Maderino, Director of Student Engagement Assessment</b>
<b>University of Kansas</b>	<b>Randall Brumfield, Ed.D., Director of Undergraduate Advising Center</b>
<b>University of Missouri</b>	<b>Ashli Grabau, Student Affairs Assessment Coordinator</b>
<b>The Washington Center for Internships</b>	<b>Kinsey Holloway – Sr. Manager Internship Advising Jacob Wilson, Ed.D. – Academic Program Advisor</b>

## Current Staffing Structure and Responsibilities:

The Office of Undergraduate Studies and Programming offers a wide variety of co-curricular programming and support for over 2300 School of Management undergraduates. The Office of Undergraduate Studies and Programming provides services and programming to three distinct student populations that consist of the Bachelor of Science in Business Administration (BSBA) continuing and newly admitted students who are primarily comprised of “traditional” students attending full-time; Bachelor of Science in Management (BSM) continuing and newly admitted students who fall in the “non-traditional” student category at the USF main and branch campuses; and Business Minor students who come from the various colleges on campus and who wish to specialize in one of 3 business minors we offer.

The Undergraduate team that serves these students and supports undergraduate co-curricular and special programming consists of 4 full-time staff members (2 exempt employees and 2 OPE):

### **FRANCISCO GAMEZ, Ed.D. - ASSISTANT DEAN OF UNDERGRADUATE STUDIES**

Francisco has worked at USF for 10 years, the past three years as Assistant Dean of Undergraduate Studies. He comes with over 20 years of experience in higher education working in various public and private universities within California, including Stanford University, University of Southern California, University of Redlands, and the California State University System. Francisco was the recipient of the School of Management Outstanding Staff Award in 2012 and 2014.

### **SIMONE HARRIS JORDAN, M.S. - MANAGER OF UNDERGRADUATE STUDIES AND INTERDISCIPLINARY STUDIES ASSESSMENT (ISA)**

Simone joined the School of Management in 2012 as a Program Assistant IV in Undergraduate Studies, and was the recipient of the School's Outstanding OPE Staff Award in 2014. She was promoted to Manager of

Undergraduate Studies in June 2014. Simone previously had worked in television as a press representative, network spokesperson, and writer/producer at NBC and Showtime. She received her BA from Hunter College (CUNY) and her M.S. from the Columbia University Graduate School of Journalism.

### **ANNE YUMANG, B.A. - PROGRAM ASSISTANT IV**

Anne is an alumna of the University of San Francisco with a B.A. in Sociology. While in school, she worked for the School of Management as a student assistant and upon graduating in 2012, she started working full-time as a program assistant at the Center for Academic and Student Achievement (CASA). In November of 2013, she joined the Undergraduate team at the School of Management as our Program Assistant IV.

### **SARAH STEER, B.A. – PROGRAM ASSISTANT IV**

Sarah recently joined the Undergraduate team in January of 2015. Prior to working at USF, Sarah worked at UC Santa Cruz, UCSF, and the UC School of Dentistry in the area of student life and services. She is a welcome addition to the Undergraduate Studies team and has been a valuable contributor to various social media/web based projects and initiatives.

## **The majority of our unit's roles and responsibilities can be summarized into 5 distinct areas of service:**

### **School of Management Student Services**

The Office of Undergraduate Studies and Programming provides student services for all of the School of Management's undergraduate populations: the Bachelor of Science in Business Administration program (BSBA), the Bachelor of Science in Management (BSM) program, and Business Minors. Our office coordinates all logistics, communication, and participation of faculty and other university departments for our New Student Orientations and Commencement Ceremonies. We also manage the selection process for the School of Management's Dean's List and Dean's Undergraduate Student Awards, provide communication outreach to students regarding internship opportunities and changes/updates for current and new course offerings, and update and maintain an active social media presence. We use our "U Need 2 Know" and "Connect with Success" undergraduate webpages to post and promote new course offerings and events, and to provide access to important student information and student resources specific to our undergraduate populations. Throughout the school year, we host a variety of co-curricular events to engage our students and enhance the overall student experience.

### **School of Management Student Leadership Development/Engagement (including Honor Societies and Honors Programming)**

The Office of Undergraduate Studies and Programming provides support and development opportunities for our undergraduate student leaders and clubs. We oversee administration of the Beta Gamma Sigma Honor Society (BGS), manage the commencement recognition of all School of Management Undergraduate honor societies (Alpha Sigma Nu, Beta Alpha Psi, Beta Gamma Sigma, McLaren Scholars, etc...), facilitate monthly meetings with club officers through our Student Leadership Advisory Board (SLAB), and manage funding requests for student development opportunities internally at USF and externally through conferences and networking opportunities. We coordinate student participation for events such as New Student Orientation, Club and Major fairs, as well as volunteers for student testimonials for our School colleagues in Marketing and Communication. In addition, the Office of Undergraduate Studies and Programming codes all McLaren Scholars in Banner, manages the McLaren Scholars application process, promotes and manages applications for the W.F. and Marie A. Batton Endowed Scholarship for junior and senior BSBA students.

### **School of Management Curricular Support**

The Office of Undergraduate Studies and Programming is involved in updating and maintaining various curricular documents, which are used as references and guidelines by faculty, staff, and students. The unit oversees the Interdisciplinary Studies Assessment (ISA), including the processing and managing of essay submissions from BSM students, distributing essays to evaluators, ensuring credit is posted by the Registrar, and managing evaluator payments. We also review and update the University Undergraduate Catalog as it relates to the School of Management, create and update BSBA, BSM, and ISA student handbooks in compliance with School and University policies and regulations, and provide specially designed handouts to assist students and faculty with planning out milestones and major requirements within four years of completion. The Office of Undergraduate Studies and Programming also advises students on the general Business minor, signs off on course prerequisite waivers for Business minors during registration weeks, signs off on Honors registration, and promotes new course offerings via flyers, social media, electronic billboards, and email.

### **School of Management Departmental Faculty Collaborations**

The Office of Undergraduate Studies and Programming works in collaboration with departments and faculty to create an excellent scholastic experience for their students and provide them with the support they need to be academically successful. We work with faculty members from all BSBA undergraduate majors to host McLaren FARE (Faculty Advising and Registration event), for which our unit coordinates faculty volunteers, logistical set-up, advertising, and support to assist students registering for courses for the following semester and who need advising on their major requirements. For this event, we work in coordination with CASA to remove advising holds on School of Management undergraduates. The Office of Undergraduate Studies and Programming also creates and implements a number of co-curricular events in conjunction with Department Chairs, student leadership, and other offices which may include speaker events, information sessions, and networking opportunities. Also, as needed, promotional and/or logistical support is provided for new course offerings, curricular events, and special initiatives in collaboration with faculty.

### **School of Management's University Initiatives**

The Office of Undergraduate Studies works on university undergraduate initiatives, primarily for Webtrack. Webtrack is a system set in place to guide incoming freshmen and transfer students to familiarize themselves with the University's policies, procedures, and registration requirements for their respective majors. This process involves filming and editing videos in collaboration with faculty from each major, creating PDF versions for each of these videos, and uploading both formats onto the Webtrack homepage (sample available at: [www.usfca.edu/webtrack](http://www.usfca.edu/webtrack)). Other university initiatives in which the

Office of Undergraduate Studies and Programming participates in the Don's Fest Resource Fair, Major and Minor fairs, and assisting with the 4 year completion/graduation rate for our undergraduate students.

## Staffing and Funding Resources Needed

With the current staffing model in place and resources allocated to current job functions, we will need additional staff resources to execute and sustain a large scale Professional Edge Program, which requires core competencies in career services, internships, student development, and assessment. To ensure the success of the Professional Edge Program and its sustainability for future years, the Office of Undergraduate Studies and Programming will need an additional \$600,000 - \$610,000 per year of budgetary funding for expenses related to the student experience, as well as the funding of the following staff lines and promotions:

### Current Staffing Promotions Needed (justifications next page)

Assistant Dean of Undergraduate Studies to **Sr. Assistant Dean of Undergraduate Studies and Programming** – Salary increase of \$30-35K  
Manager of Undergraduate Studies to **Assistant Director of Undergraduate Studies** – Salary increase \$10K

### New Staff Lines Needed (justifications next page)

**Assistant Director for Student Professional Development** – \$65-75K  
**Manager for Internships and Professional Experience** - \$55-65K  
**Manager for Student Engagement and Assessment** - \$55-65K  
**Program Assistant IV** – Support Professional Development Programs - \$45-48K

## Justifications of Promotions and Staff Lines:

### Senior Assistant Dean of Undergraduate Studies and Programming

Increasing responsibility and accountability for student co-curricular programming for over 2000 BSBA students, as well as current responsibilities to BSM (approx. 216) and Business Minor students (approx. 80).

Research and Implementation of the Professional Edge Program.

Logistical oversight and vision for the Professional Edge Program in addition to current duties.

Innovative strategies to roll out Professional Edge and provide student incentives such as a co-curricular transcript.

Oversight of assessment of Professional Edge for accreditation and other Federal and State reporting as related to the co-curricular student experience and outcomes.

Over 20 years of experience as a higher education administrator with both professional and academic training/advancement.

Educational background that complements the division of Undergraduate Studies and Programming

Equity of pay, with increasing duties, areas of responsibility, and student population size. Increase based on these increasing factors and in comparable worth to my SOM Graduate program colleagues.

Years of top performance as Assistant Dean of Undergraduate Studies and Director of Undergraduate Programs. Proven track record that has exceeded expectations every year while remaining an engaged and vital member of the SOM community.

### Assistant Director of Undergraduate Studies

As the Sr. Assistant Dean assumes implementation of the Professional Edge Program and strategic goals for the unit, the Assistant Director of Undergraduate Studies will assume more day-to-day operational responsibilities.

Project Management of student events including, but not limited to BSBA Orientation, BSM Orientation, McLaren FARE, End of Year Celebrations, and major related symposiums/guest speakers/lecture series.

Provide key support to the management of the Undergraduate Student Awards and Dean's List process and report related functions every semester.

Manage and oversee SOM Undergraduate Webtrack production and outreach.

Simone is a valued team member that has been a key player in the growth and success of the Undergraduate Studies division for the past three years.

### Assistant Director of Student Professional Development

Research and contact companies and organizations to build dynamic programming and internship opportunities for the BSBA undergraduate population.

Network with alumni to build and sustain working relationships to provide programming to our students.

Work with faculty and staff to support the School's mission and develop professional opportunities for our students.

Liaison between the Career Services Center and School of Management to coordinate internship and career development opportunities, advertise these opportunities, and maintain the SOM Internship blog and database.

Research and stay current in employment trends and career/professional development practices through participation in regional and national career/student affairs organizations.

Develop and maintain records and data on student appointments, employer contacts, and placement upon graduation for use in SOM reporting.

### Manager for Student Internships and Professional Experience

Liaison between Career Services Center and School of Management to coordinate internship and career development opportunities, as well as building relationships with potential employers within the business field.

Outreach to companies and organizations to provide internship opportunities to our domestic student population and professional experience opportunities for our international student population who cannot obtain internships due to restrictions from their international student visa.

Track and maintain records on student placement of internships and professional experience with various organizations.

Track and maintain student internship and professional experience hours for the Professional Edge 100 hour requirement for internships or professional experiences.

Meet with students to discuss strategies to obtain internships and work with students one on one to assist with the internship or professional experience application process.

### Manager for Student Engagement and Assessment

Administer and coordinate quality services and co-curricular programs that enhance students' academic, social, cultural, ethical, and intellectual growth.

Assist in the development and implementation of policies, procedures, and programs that contribute to student success.

Build, develop, and grow any business relationships vital to the success of the project or event.

Conduct post mortems to evaluate the efficacy of each event and project related to student engagement and leadership.

Track and Maintain Assessment Data as related to SOM student services and our undergraduate student population, as well as synthesize and collect data on student outcomes for accreditation, Federal, and State reporting.

### Program Assistant IV

Provides key administrative services as stable point of contact for highly dynamic and fast paced undergraduate studies division within the School of Management (SOM).

Provides support to the SOM undergraduate community both domestic and international students, faculty, and administrator in the areas of SOM professional development, strategic inclusion/integration, engagement within the larger SOM and University community.

Assists with the administrative management of all activities related to the Professional Edge Program.

Creates and facilitates an active undergraduate web and social media presence creating a cyber-social community within the School that helps promote the strategic direction and community building efforts of the undergraduate unit.

Acts as a resource liaison between and among faculty, students and the University community and members of the public. Must establish and maintain effective working relationships with peers in other offices.

Helps sustain a welcoming, professional, and collaborative work culture/environment. Providing excellent customer service to all faculty, staff, students, and guests of the School of Management.

## Summary of Budget Lines

### STAFFING AND PROMOTIONS

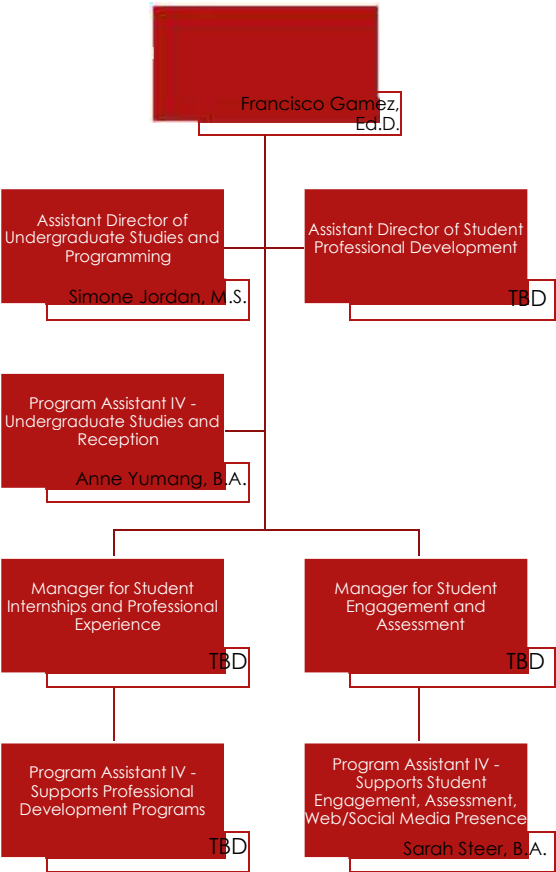
Estimated Budget	Staff Line
\$65,000-75,000 yearly salary	Assistant Director for Student Professional Development
\$55,000-65,000 yearly salary	Manager for Student Internships and Professional Experience
\$55,000-65,000 yearly salary	Manager for Student Engagement and Assessment
\$45,000-48,000 yearly salary	Program Assistant IV
\$30,000-35,000 increase in salary	Sr. Assistant Dean of Undergraduate Studies and Programming (prev. Assistant Dean of Undergraduate Studies)
\$10,000 increase in salary	Assistant Director of Undergraduate Studies and Programming (prev. Manager of Undergraduate Studies and ISA)



**PROGRAMMATIC EXPENSES**

Estimated Budget (population: over 2000 BSBA undergraduates with 500+ students per class level)	Expense Items
\$10,000	Software updates and technology hardware (iPads, Mobile Swipe Tech, FileMaker Pro, Card Readers, Software Licensing, etc....)
\$40,000	Catering Budget (yearly) – Includes large networking events, receptions, etiquette workshops, etc....
\$25,000	Supplemental Materials (yearly printing, posters, event related expenses, deposits, etc....)
\$25,000	Professional Edge Program Supplies and Swag (yearly swag related items, advertising, promotions, etc....)
\$50,000	Speaker fees, faculty incentives, participatory fees, etc....
\$30,000	Staff training and professional development opportunities such as conferences, symposiums, etc....
\$50,000	Student professional development – competitive scholarships (due to available funds and number of students) for conferences, symposiums, competitions, travel, study abroad opportunities, etc....
\$90,000	Outward Bound Excursions/Experiences for up to 500 students spaced out over the academic year (\$75K = \$150x500 students), plus bus/shuttle transportation (\$10-15K).

Proposed Organizational Chart/Staffing Structure The Office of Undergraduate Studies and Programming



## [DRAFT] Professional Edge Implementation Timetable

	Goals	Fall 2015	Spring 2016	Fall 2016	Spring 2017
<b>Workshops</b> Responsible Units: UG—UG Office CC—Career Center LIB—Library BL—Bloomberg Website		<ul style="list-style-type: none"> <li>SOM Majors (UG)</li> <li>Clubs/Student Organizations (UG)</li> <li>LinkedIn Profiles (CC)</li> <li><i>Pilot:</i> Student Portfolios (O'Meara)</li> </ul>	<ul style="list-style-type: none"> <li>Internship Basics (UG/CC)</li> <li>Job Search 101 (CC)</li> <li>Career Assessment (BL)</li> </ul>	<ul style="list-style-type: none"> <li>Careers Tune-up (CC)</li> <li>Research/Media Literacy (LIB)</li> </ul>	<ul style="list-style-type: none"> <li>Business Etiquette (TBD)</li> </ul>
<b>Experiential Events</b> Company Visits Conferences/Symposia Speaker Series Emerging Technology Seminars	The total number of Experiential Events will increase annually at the Main Campus, at the Howard Campus, and at off-site locations.	<ul style="list-style-type: none"> <li>2<sup>nd</sup> Annual Bloomberg Day (includes Website tutorial; BAT testing)</li> <li>Salesforce Bootcamp [intersession]</li> </ul>	<ul style="list-style-type: none"> <li>Bloomberg Terminal Overview</li> <li>Bloomberg Visit</li> </ul>		
<b>Competency Development</b> Competitions Simulations Technology Certifications	The total number of Curricular Enhancements will increase annually.		<ul style="list-style-type: none"> <li><i>Pilot:</i> Outward Bound Leadership Development (half or full day)</li> </ul>	<ul style="list-style-type: none"> <li><i>Pilot:</i> Computer Simulation (e.g., ethics, project management, etc.)</li> </ul>	
<b>Internships</b>	Internship Manager in place by September 15. By Fall 2017, on average, an UG BSBA student has completed an internship (see "Notes").		Official Launch.		
<b>Alumni Networking</b>	At least <i>one event</i> per semester.				
<b>The Management Exercises</b>	Mirroring aspects of The Spiritual Exercises, The Management Exercises will focus on contemplative practices/events to help students deepen their understanding of their future roles in business and the global society.	Submit Jesuit Foundation Grant Proposal (Connor/Stackman)	Develop Management Exercises Program (Connor/Stackman)	Official Launch.	

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Notes:

- The implementation of the Professional Edge Program and the redesign of the BSBA Program *will mutually complement one another*.
- The implementation of the Professional Edge Program *will supplement* USF 101 and USF 101-T.
- The decision as to whether the Program is mandatory or optional has not been made. If mandatory, decisions as to how best to institute the Program as a graduation requirement.
- From the outset, specific aspects with respect to innovation, impact and engagement will need to be assessed. Additionally, assessments of Program elements are necessary to demonstrate continuous improvement of the Program.
- Activities/Events labeled as 'Pilots' will be evaluated before becoming permanent.
- As the Program becomes more fully implemented the UG Office staffing levels (both exempt and OPE) will need to be reviewed.
- What constitutes an internship has yet to be defined. Broadly defined, an internship is "any period of time during which an individual acquires experience in an occupation or profession.

#### [DRAFT] **Student Learning Outcomes**

The Professional Edge Program prepares students to:

- Transition as a professional into the business world;
- Integrate theory with practice by connecting relevant experience with academic knowledge;
- Communicate and engage effectively in business settings;
- Utilize emerging technologies; and
- Collaborate within a diverse workforce to meet the challenges of 21<sup>st</sup> Century businesses.

**APPENDIX 9**  
**Service Learning Projects and Organizations**

**ORGANIZATION NAME:**

7 Tepees Youth Program	1	St. Vincent De Paul	4
826 National	1	TECHO	1
African-American Shakespeare Company	8	Telegraph Hill Neighborhood	3
AfroSolo	1	Treasure Island Sailing Center	2
American Vista	1	Tzuchi Foundation	1
Bayview Community Legal	1	United Way Silicon Valley	1
Better Beginnings	1	Universal Giving	1
Brothers for Change	2	UpOnTop	2
Carter Terrace	1	Upward Bound	2
Catholic Charities	1	Veterans Helping Veterans	1
Chop's Teen Center (SR)	1	ViviendasLeon.org	1
Coaching Corps	2	YMCA Bayview Hunter's Point	5
Community Technology Network	1	YMCA Western Addition Family Resource	
Community Media	1	Center	1
EcoSF	1	YWCA Silicon Valley	1
Family House	1		
Family Supporting Housing (SJ)	1	<b>Total</b>	<b>120</b>
Food for Thought (Forestville)	1		
Foundation for Sustainable Development	1		
Friends of the Urban Forest	3		
GenerationCitizen.org	1		
Girls to Women	2		
Glide Memorial	2		
Habitat for Humanity	2		
Hamilton Family Center	1		
Harmonic Humanity	1		
His Kids	2		
InnVision Shelter Network (SJ)	1		
Japanese Youth Council	1		
JUMA Ventures	1		
Jumpstart	1		
Kid Scoop	1		
Mama Hope	1		
Meals on Wheels	8		
Mercy Housing	1		
Mission Graduates	5		
Mo Magic	4		
National High Five	4		
One World	4		
Open Hand	1		
Project Open Hand	1		
Puppy Partners	1		
Reading Partners	1		
Red Rose Culinary Academy	1		
Rooms for Change	3		
Salvation Army	4		
SF Beacon Initiative	1		
SF Peer Resources	1		
SFSPCA	1		
Sisters of Perpetual Indulgence	1		
SMART	1		
Sonoma Task Force	1		
St. Cyprian's Church	2		

**APPENDIX 10**  
**The BSBA Curriculum Redesign Project**

UNDERGRADUATE PROGRAM DESIGN THINKING DEEP-DIVE

Exploring future curriculum innovations

# Exploring Future Student Needs + Program Innovations



## REFRAMING THE UNDERGRADUATE PROGRAM

As part of developing best curriculum experiences, The School of Management has embarked on a re-examination of fundamental competencies that UG students will need in the future

From there it will recast specific classes that are offered to enhance and differentiate the Undergraduate program.

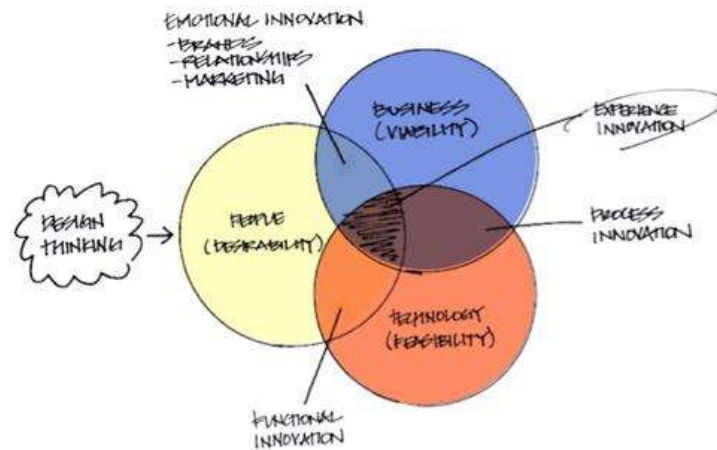
## INSPIRED BY FUTURE STUDENT NEEDS

This stage of the project has explored alternative strategies for framing the student experience in a new and differentiating way.

It is a first step in development, prototyping and evaluation of new curriculum elements.

## APPLYING DESIGN THINKING METHODOLOGY

The project is using Design Thinking innovation methods to create powerful differentiation for the future UG program.

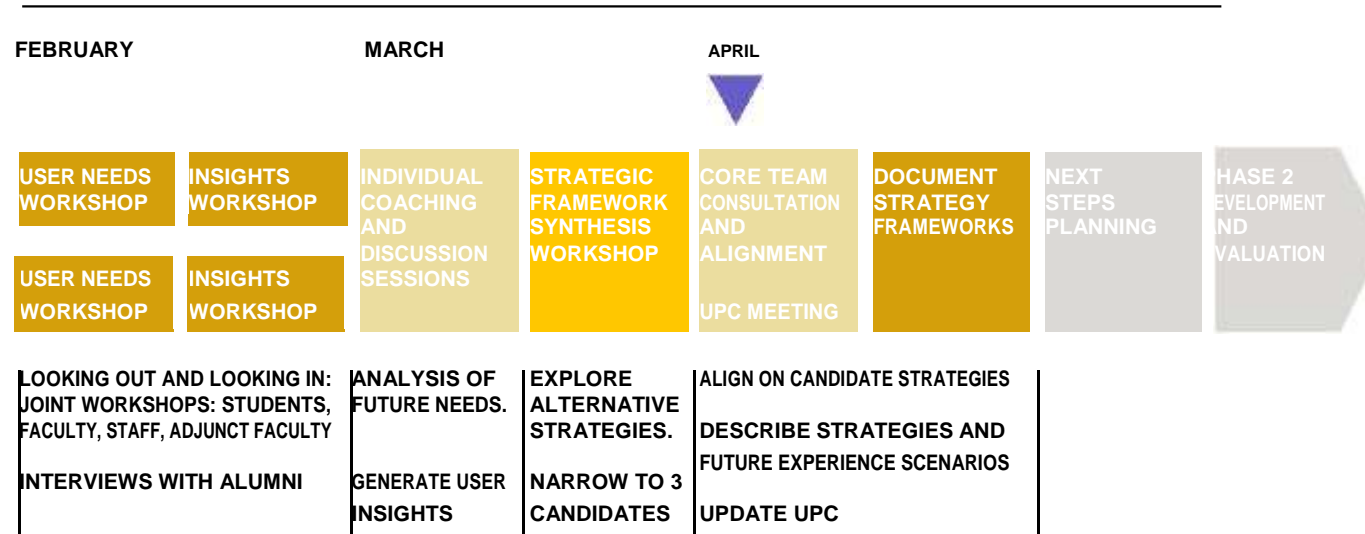


It starts with understanding user needs to inspire development of an exciting experience for students - and other stakeholders.

This is a Design Thinking Deep Dive to generate ideas in an accelerated timeframe.

## PROJECT PROCESS

Ideas have been inspired by program stake-holders, including students and alumni, who have participated in this phase the project.



## PROJECT PROCESS

Activities have included group discussions and brainstorming, individual interviews, reviews as part of synthesizing future, academic, business and technology factors.



Measuring success  
- Job placement/success placement  
- Interviewing, how enter the  
Relationships with well does e  
0 Potentially employers  
later down



## PROJECT PROCESS

We started by 'looking out' at causal forces that will affect the future program, such as business and education developments involving:

Globalization / Company culture / Sustainability / Rapid change / Ethical issues / Disruptive innovation / Collaboration / New markets / Degree value / People skills / Technology skills / Changing expectations...

And we 'looked in' at opportunities and challenges within SOM involving:

Communication - classmates and faculty / Teaching styles / Work-life balance / Marketing oneself / Multi-tasking / Scheduling / SOM technology / Cohort culture / Success / Milestones / Assimilation / Alumni / Internships / Employment rates / Personal beliefs / University mission / Entry salaries / Evaluations / Theory & practice / Recruitment...

## KEY USER INSIGHTS

A number of key user insights emerged.

Some will be issues which are familiar,  
but need restating to get the whole picture.

Others can inspire fresh thinking about the student  
experience.

## WHAT WE LEARNED - USER INSIGHTS SUMMARY

IDENTITY AND  
DIFFERENCE IS  
UNCLEAR

THERE IS A  
TECHNOLOGY  
GAP

TRADITIONAL  
APPROACHES ARE  
DULL & DUSTY

PERSONAL  
MARKETING  
CREATES ANXIETY

BUSINESS WANTS  
DEPTH WITH  
FLEXIBILITY

STUDENTS LACK  
BUSINESS SOFT  
SKILLS

ANALYTICS +  
ANALYSIS ARE AT  
THE SHARP EDGE

DIVERSITY  
IS NOT  
LEVERAGED

STAYING  
CONNECTED IS A  
CHALLENGE



## USER INSIGHT [01] IDENTITY

# The program's differentiation and strengths are not clear.

**Faculty, Adjunct Faculty, Staff and Students do not appear to have a clear and consistent view of what distinguishes the program over other schools... its DNA.**

*"USF is a hedge school. It needs to improve its ranking."*

*"Students learn applicable skills, knowledge as opposed to just getting letter grades"*

*"Students have the theoretical understanding but not the tools to apply theory to reality in a real life situation"*

*"Schools like Berkeley are much more demanding (of students)."*

*"USF students are known to be nice, but not hungry"*

*"Located in the heart of San Francisco, USF provides you with exceptional access to downtown's business district and Silicon Valley startups."*

*"Media and web promotion is centralized..."*

## USER INSIGHT [01 IDENTITY

### Opportunity?

Define a program experience that will create more impact.

What if...

Everyone contributed to future program direction and identity?

Identity development was an opportunity for transparency - avoiding politics?

The DNA drove new faculty and staff roles?

There was a different identity (but shared DNA) with the University? The local community was involved in

DNA development? Businesses were invited to participate in program DNA development? The goals

changed... educate becomes empower?

## USER INSIGHT [02] TECHNOLOGY

# There is a technology gap between program and business world.

There are high technology expectations for business graduates from a Bay Area university. The technology of the program does not match technology in business.

Alumni are finding total facility with OLAP and other digital analysis tools expected from them, and they scramble to catch up in their early employment.

*"In the Program you don't learn practical skills that you need to hit the ground running day-to-day... I have friends in trade school that came out; they are making a good living and love their work, which they feel they know how to do. I don't have that."*

*"Business is all about technology"*

*"Accelerating needs for technical skills and converting data into information, mostly in the form of reports, to compete with rivals (is a challenge in business)"*

*"The basic technology course went away... why?"*

## USER INSIGHT [02] TECHNOLOGY

### Opportunity?

**Raise the level of technology content to a program strength.**

What if...

The computer science department was a closer partner? Success meant technology excellence?

Faculty and staff learned latest technology with students? The program technology tools were state of the art? Technology services provided some program elements? The program embraced data?

The program helped businesses with their data challenges?

The program had internal projects like ‘the future of data mobility’?

## USER INSIGHT [03] LEARNING METHODS

Traditional teaching methods are regarded as dull, dry and dusty.

Traditional university teaching continues to make use of ‘traditional’ instruction methods.

Online competitors offer innovative education combining individual computer-based studies with efficient face to face interaction.

*“I listen to older people talk and talk, and I write it all down so I can remember it later... so these older people can determine whether I have learned anything”*

*“I have friends in trade school that came out; they are making a good living and love their work which they feel they know how to do. I don’t have that.”*

*“But so many things are becoming obsolete. So instead of being taught (e.g. how to write a correct business plan) we need to learn more about how to learn”*

*“In the Program you don’t learn practical skills that you need to hit the ground running day-to-day...”*

*“You have to remember their age... students are young...”*

## USER INSIGHT [03] LEARNING METHODS

**Opportunity?**  
**Experiment with new, more exciting ways to learn.**

What if...

Learning was regarded as a life-time skill?

Other effective learning experiences were mimicked?

Teachers brainstormed new alternatives to traditional lectures? Students participated in brainstorming learning method experiments? Moving from directed to more self-directed goal-driven learning? The goal was to equip students with a POV (emerging KOL's)? Lectures were more interactive events?

Learning became mainly experiential? Learn by doing was the main model?

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USF + JOHN STODDARD / UNDERGRADUATE STUDENT EXPERIENCE DESIGN THINKING DEEP DIVE / OVERVIEW / 04.10.15 / CONFIDENTIAL

## USER INSIGHT [04] PERSONALIZATION



# Students vary, and personal marketing is a source of pressure and anxiety

The program has a 'one-size fits all' aspect to it. How to succeed on the program and employment does not seem always clear to students. Students want to have more control of their education experience, and they want it to enable personal marketing.

*"It seems like there is a single track - like the options are so limited. Everyone has the same goal because we're measuring success so narrowly"*

*"It was a bummer that at my last semester I finally was with folks I could get into engaging conversations with about our common interests. I was like where have you been?"*

*"Missing program elements? Networking effectiveness training"*

*"Missing program elements? I wish I had been able to take more courses that covered advanced Excel (e.g. macros) and other computer languages..."*

*"Lack of guidance fostered (my) ability to be more independent and taking action to make things work"*

## USER INSIGHT [04] PERSONALIZATION

### Opportunity?

Offer more options for personalized program paths.

What if...

Moved from directed to self-directed goal-driven network? Students were coached to be much more entrepreneurial? There were more program options, curriculum on demand?

Students on parallel or similar paths work together from the start? Students could change their program options at any time?

No two programs were the same?

Students could take breaks to research, intern or explore?



## USER INSIGHT [05] CHANGE

# Business is looking for deep skills but with flexibility.



**Business managements want team members who have skills in depth, particularly in fields like data analysis and digital services. But they want those specialists to adapt constantly as business, markets and technologies change.**

**Companies as are working to escape from organizational silo mentality. They will need people who can adopt new mindsets, learn new skills and deal with a changing business environment.**

*“The rudimentary qualifications necessary to get a job may not change. But so many things are becoming obsolete. So instead of being taught (e.g. how to write a correct business plan) we need to learn more about how to learn”*

## USER INSIGHT [05] CHANGE

### Opportunity?

**Enable learning skills and broader business understanding.**

What if...

Crossover skills and knowledge were taught? Students could move around departments?

The program equipped students with personal change management skills? Generational, age, and cultural differences became advantages? Diversity was taken to a higher level - extreme diversity?

Students leave university already experienced dealing with change? Alumni were interviewed regularly on video about change

## USER INSIGHT [06] SOFT SKILLS



The program is in the academic world, but students want business world soft skills.

Connections with business, and alumni in business, seem to be distant, so familiarity and engagement with business networking is limited. Learning by doing could be an effective way to learn soft skills if the program was less 'in a bubble'.

*"Exposure to real valuable resources with real people-networking... there is not a huge web of resources that USF tries to connect us up with.."*

*"USF should provide more exposure to the business world - internships, club activities"*

*"Connections at USF not as great as other colleges"*

*"I feel the school inadequately equips its students with the technical skills and connections needed to find secure footing in the workforce"*

*"We have the theoretical understanding but not the tools to apply theory to reality in a real life situation"*

*"(One measure of program's success) - meaningful internships"*

## USER INSIGHT [06] SOFT SKILLS

### Opportunity?

Become an active part of the business  
networking ecosystem.

What if...

Empathy skills were developed to a high level allowing recognition of the thoughts, emotions and experiences that business people are having?

The program was a cool place for business to hang out?

The program made it easy for business experts to engage with the program?

What if employers were not just thought of as employers?

The program was a business social network?

## USER INSIGHT [07] GLOBALIZATION

**The diversity of the program is not leveraged to maximum advantage.**

The program is very multi-national and multi-cultural. This can be perceived as a source of challenges - how to balance cultural groups, how to encourage collaboration, how to deal with behavioral differences?

*"International students have cultural differences that create tensions... different nationalities participate in different ways. But there is no explanation of how teams work... different models"*

*"There is no international, global perspective... analysis of what's going on in the business world"*

*"the program is more and more global, which creates enormous potential social and cultural capital"*

## USER INSIGHT [07] GLOBALIZATION



**Opportunity Develop  
international  
identity + global scope**

What if...

The program made its internationality more visible?

There was more cultural exchange between students, and between staff, as part of learning?

The program extended international links by expanding existing USF links (for instance with IÉSEG Business School in France, who are in turn linked with the Copenhagen Business School)?

The program concentrated on new levels of explicit help with cultural differences for all students?

International knowledge sharing between students was expanded?

The program faculty expanded links with tens of international business school faculties to create a swap-network?

## USER INSIGHT [08] RESEARCH

Research and analysis are the sharp  
edge of business.



**Employers require increasing facility with handling and managing quantitative information.**

*"The volume of data pouring in from operations is astounding and those who can decipher it to answer business policy questions are highly valued"*

*"Analysis is taught, but not reinforced during the program. There is a broken linkage..."*

*"Perhaps students should be encouraged to take (Excel and other software) classes in the Computer Science Department. if they are offered there"*

*"In business, economics and other fields, decisions will increasingly be based on data and analysis rather than on experience and intuition. "We can start being a lot more scientific" (MIT)*

*"... The march of quantification, made possible by enormous new sources of data, will sweep through academia, business and government. There is no area that is going to be untouched." (NYT)*

## USER INSIGHT [08] RESEARCH

### Opportunity?

Develop deeper links with CS, and a point of view on data.

What if...

The program took a lead in the interpretation of analytics?

The UG program offered classes in the Computer Science Department?

Joint ventures were created with the Computer Science Department?

The program put an emphasis on managing big data-driven decision making?



## USER INSIGHT [09] COLLABORATION

# Staying connected with fellow students and teachers is a challenge.

Many business management styles are changing from limiting command and control cultures to become alignment-based, matrix organizations. Collaboration is an increasingly important element of business culture.

Students need to be more collaborative in their studies.

Collaboration and communication are a challenge - communication with classmates and teachers, personal links to professors, limited time slots for classes with relevancy, scheduling interviews during classes.

*“Students don’t like team projects...”*

*“Soft skills are a great potential differentiator for the program”*

*“group work was straining and not much applicable skills gained from it”*

## USER INSIGHT [09] COLLABORATION

### Opportunity?

Encourage collaboration in all elements of the program.

What if...

The program offered an advanced set of digital collaboration tools? Alumni could be users of the internal collaboration tools?

The program working spaces encouraged team collaboration? The program had a strong presence on LinkedIn or Facebook? The program had proprietary logistics and time management tools?

## WHAT WE LEARNED USER INSIGHTS SUMMARY

IDENTITY AND  
DIFFERENCE IS  
UNCLEAR

THERE IS A  
TECHNOLOGY  
GAP

TRADITIONAL  
APPROACHES ARE  
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PERSONAL  
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CREATES ANXIETY

BUSINESS WANTS  
DEPTH WITH  
FLEXIBILITY

STUDENTS LACK  
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SKILLS

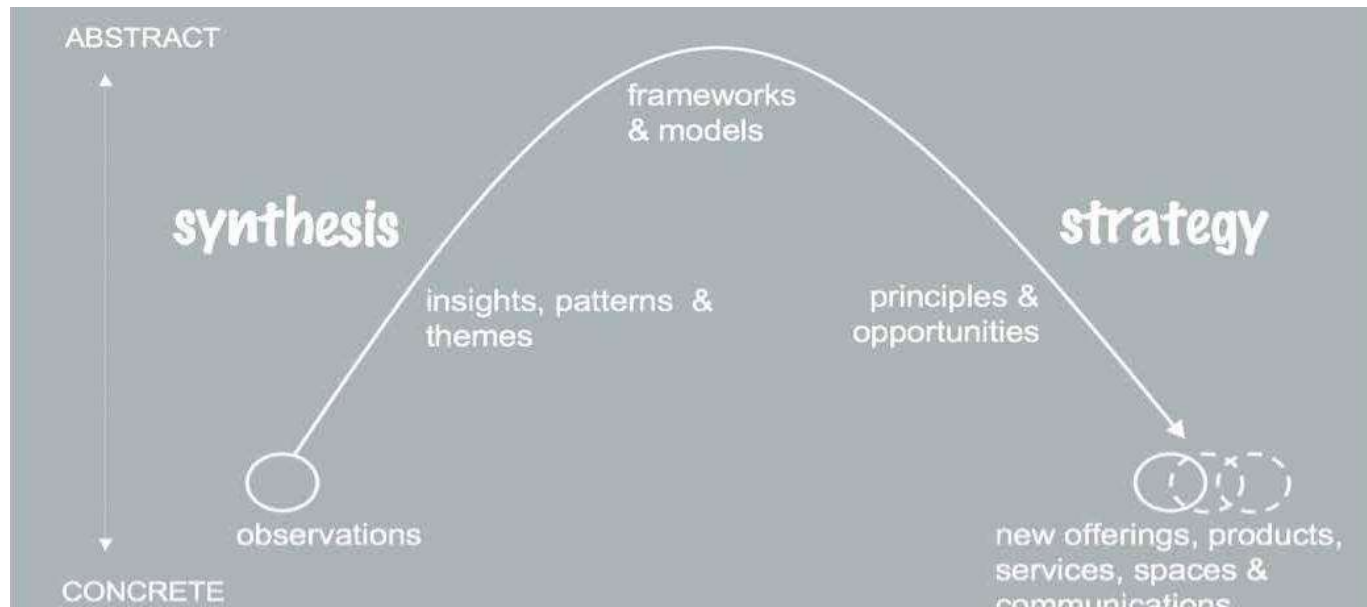
ANALYTICS +  
ANALYSIS ARE AT  
THE SHARP EDGE

DIVERSITY  
IS NOT  
LEVERAGED

STAYING  
CONNECTED IS A  
CHALLENGE

## SYNTHESIS STRATEGIC FRAMEWORK STARTER IDEAS

Strategic Frameworks builds on user insights and focus innovation efforts by defining the 'big idea' that will drive relevant changes. This approach helps project into the future and strive for sufficient level of innovation for full impact.



## SYNTHESIS STRATEGIC FRAMEWORK STARTER IDEAS

To help discussions, three concepts are introduced on the following pages.

They describe alternative ways the future student experience might be framed. They are concepts that are not fully resolved, but intended to start the conversation.

First, let's look at existing examples...

## FRAMINGEXAMPLE: APPLE

# Simple, Creative, Luxury



A frameworks can be a description which fits only our future brand. Words like “friendly,” “honest” and “reliable” tend to be generic, so we need to find a unique set of words.

For example...

**SIMPLE** presentation of complex experiences

**CREATIVE** tools for generating wonder

**LUXURY** pleasurable interactions based on best quality

To quote Apple...

“The people here at Apple don’t just create products — they create the kind of wonder that’s revolutionized entire industries. It’s the diversity of those people and their ideas that inspires the innovation that runs through everything we do, from amazing technology to industry-leading environmental efforts. Join Apple, and help us leave the world better than we found it.”

## FRAMING MIT SLOAN MANAGEMENT SCIENCE



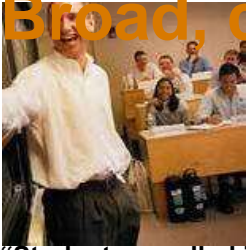
### Analytical, collaborative, practical

**“At MIT Sloan, we’ll challenge you to expand your analytical and quantitative skills. We’ll help you bring a business perspective to your technical expertise so you can do more with it. You’ll do problem sets, but problem sets with a practical purpose, using business cases so you will learn not only how to get the answer, but also how to apply that answer.**

**And we’ll help you take your learning further. At MIT Sloan, knowing the answers is not enough. We want you to bring your ideas into the world. You’ll learn how to explain and share your knowledge and inventions with the world and collaborate with others to build on them.”**

## FRAMING NORTHWESTERN KELLOGG

### Broad, critical, networked



**“Students enrolled in the Certificate Program for Undergraduates receive training and education that put them at a distinct advantage over their peers who are interested in business careers.**

**Northwestern University’s undergraduate students benefit from a broad and well-rounded education, coupled with in-depth exposure to specific academic disciplines. The Certificate Program builds on this strong academic foundation: Students develop advanced skills in qualitative and quantitative reasoning; gain exposure to real-world corporate scenarios; understand the nuances of solving challenging business problems; and receive training from some of the world’s most highly regarded academics. Together, this education produces highly skilled graduates who stand out from their peers in the marketplace.”**



## FRAMING HAAS

# Questioning, confidence, beyond yourself



**“Students who earn a Bachelor of Science degree from the Haas School of Business Undergraduate Program possess the knowledge and technical skills necessary to understand the modern business world, to achieve the highest levels of success in their professional careers, and to prepare for subsequent graduate work. This highly competitive program accepts applicants from both transfer and continuing UC Berkeley students.**

**Coursework is fully integrated with the University’s liberal arts curriculum, resulting in graduates who are able to draw upon their knowledge of the arts and sciences as well as business in their endeavors.”**

## FRAMING IE MADRID

### Global, leadership, ambition



**“The Bachelor in Business Administration is a fully accredited and prestigiously recognized international business program that will enable you to redefine what business is. It offers a practice-based approach, entrepreneurial outlook and the global connections that you need to guarantee a successful career in the world’s top corporations or to set up your own business.”**

## WHAT WE LEARNED ABOUT THE CURRENT UG PROGRAM

IDENTITY AND  
DIFFERENCE IS  
UNCLEAR

THERE IS A  
TECHNOLOGY  
GAP

TRADITIONAL  
APPROACHES ARE  
DULL & DUSTY

PERSONAL  
MARKETING  
CREATES ANXIETY

BUSINESS WANTS  
DEPTH WITH  
FLEXIBILITY

STUDENTS LACK  
BUSINESS SOFT  
SKILLS

ANALYTICS +  
ANALYSIS ARE AT  
THE SHARP EDGE

DIVERSITY  
IS NOT  
LEVERAGED

STAYING  
CONNECTED IS A  
CHALLENGE

# SYNTHESIS STRATEGIC FRAMEWORK IDEAS

The starter frameworks introduced on the following pages are:

**Focusing on human-centered technology**

**Inspired by startup culture**

**A hub in the real business network**

## STRATEGIC FRAMEWORK 1: FOCUSING ON HUMAN-CENTERED TECHNOLOGY

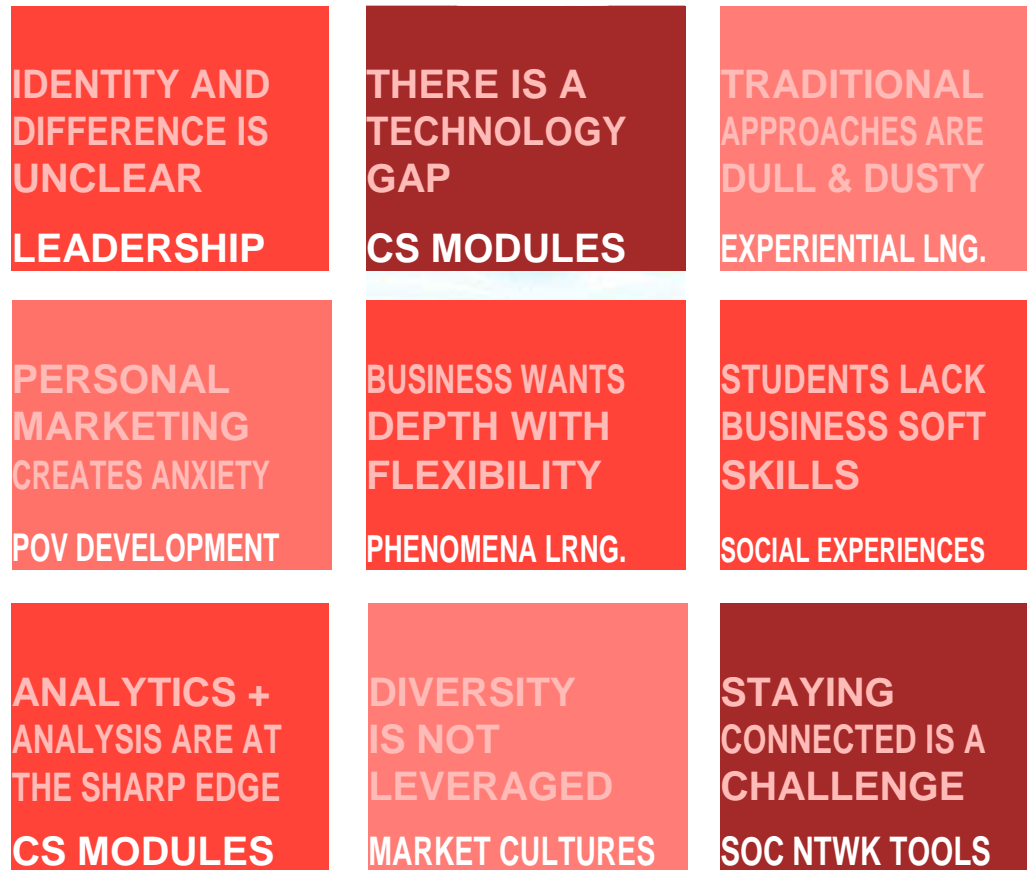
### Key Idea

Inspired by the Jesuit education mission.

### Value Proposition

Revitalizing the UG program by bringing the qualities of discernment, ethics, and diversity to expertise in technology application with knowledge, empathy, and acute judgment.

## STRATEGIC FRAMEWORK 1: FOCUSING ON HUMAN-CENTERED TECHNOLOGY



## STRATEGIC FRAMEWORK 1: FOCUSING ON HUMAN-CENTERED TECHNOLOGY

### Potential future student experiences

- Generate links with social-technology institutions
- Network with non-profits working with entrepreneurial tech
- Innovation projects develop USF Design Thinking process - Self-generated projects explore tech application POV's
- White Papers to create provocations on business topics - Network with sustainable technology KOL's



## STRATEGIC FRAMEWORK 2: INSPIRED BY STARTUP CULTURE



### Key Idea

Inspired by Startup culture, and mimicking its energy and behaviors.

### Value Proposition

Revitalizing the UG program by immersing students in the innovative startup-style culture for which San Francisco and Silicon Valley is admired.



## STRATEGIC FRAMEWORK 2: INSPIRED BY STARTUP CULTURE

IDENTITY AND  
DIFFERENCE IS  
UNCLEAR

THE STARTUP PROGRAM

THERE IS A  
TECHNOLOGY  
GAP

CS MODULES

TRADITIONAL  
APPROACHES ARE  
DULL & DUSTY

DIGITAL TOOLS

PERSONAL  
MARKETING  
CREATES ANXIETY

SELF BRAND DVPT.

BUSINESS WANTS  
DEPTH WITH  
FLEXIBILITY

ON-DEMAND OPTIONS

STUDENTS LACK  
BUSINESS SOFT  
SKILLS

80% TEAMWORK

ANALYTICS +  
ANALYSIS ARE AT  
THE SHARP EDGE

CS MODULES

DIVERSITY  
IS NOT  
LEVERAGED

WORK DYAD PAIRING

STAYING  
CONNECTED IS A  
CHALLENGE

PERSONAL INTRANET

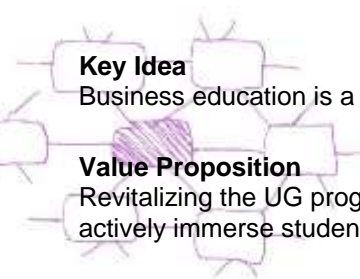
## STRATEGIC FRAMEWORK 2: INSPIRED BY STARTUP CULTURE

### 3. Potential future student experiences

- Participant in incubators with startup partners - Self-generated UG program projects
- Attract VC funding
- Networking with high growth, newsworthy business people - Spin-off ventures supported by USF
- A growing collection of UG apps created by UG teams



## STRATEGIC FRAMEWORK 3: A HUB IN THE REAL BUSINESS ECOSYSTEM



### Key Idea

Business education is a hub in the greater business network.

### Value Proposition

Revitalizing the UG program by expanding entrepreneurial, corporate and non profit connections to actively immerse students inside the business network from day one.

### STRATEGIC FRAMEWORK 3: A HUB IN THE REAL BUSINESS ECOSYSTEM

IDENTITY AND  
DIFFERENCE IS  
UNCLEAR

A BUSINESS HUB

THERE IS A  
TECHNOLOGY  
GAP

CS PARTNERSHIP

TRADITIONAL  
APPROACHES ARE  
DULL & DUSTY

PROJECT-BASED

PERSONAL  
MARKETING  
CREATES ANXIETY

ECO-NAVIGATOR

BUSINESS WANTS  
DEPTH WITH  
FLEXIBILITY

MULTI-ROLES

STUDENTS LACK  
BUSINESS SOFT  
SKILLS

SOM-STARTER

ANALYTICS +  
ANALYSIS ARE AT  
THE SHARP EDGE

RESEARCH RESEARCH

DIVERSE CULTURE IS  
NOT LEVERAGED

KNOWLEDGE SHARING

STAYING  
CONNECTED IS A  
CHALLENGE

KS / COM INTERNET

## STRATEGIC FRAMEWORK 3: A HUB IN THE REAL BUSINESS ECOSYSTEM

### Potential future student experiences

- Integration of Career Service Center with all UG activities - Major, rapid expansion of contact points with business
- Knowledge sharing to promote a clear POV
- Merge current student and alumni into one network - Cultivate media networking and publishing
- Expand 'Key Opinion Leader' network



## NEXT STEPS POTENTIAL PHASE 2 ACTIVITIES

Consultation with all stakeholders Explore alignment with Professional Edge

Develop candidate frameworks in extended team  
workshops

Align on final curriculum direction and key elements

Define curriculum details - designated skills, student experience, etc.

Develop roll-out plan

Submit curriculum and roll-out plan for approval

# NEXT STEPS POTENTIAL PHASE 2 TIME LINE

PHASE 1

PHASE 2

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER



DOCUMENT  
STRATEGY  
FRAMEWORKS

WORKSHOP  
PLANNING  
  
SET UP TEAMS  
  
UPC MEETING

CURRIC. DVP  
WORKSHOPS  
  
CURRIC. DVP  
WORKSHOPS

CURRICULUM  
CONTENT AND  
STRUCTURE  
CONVERGENCE  
WORKSHOP

DOCUMENT  
CURRICULUM,  
2016 ROLL-OUT  
PLAN, FUTURE  
ROADMAP

APPROVAL FOR  
IMPLEMENTN.

ROLL OUT

ALIGN ON CANDIDATE STRATEGIES

DESCRIBE STRATEGIES AND  
FUTURE EXPERIENCE SCENARIOS

UPDATE UPC

GENERATE PHASE  
DETAILED PLAN &  
DISCUSSION  
TOPICS (HMW'S)

UPDATE UPC

REFINE FRAME-  
WORKS & CURRIC-  
ULUM CONCEPTS  
IN TEAM WORK-  
SHOPS

ALIGN ON FINAL CURRICULUM  
  
DEFINE CURRICULUM CONTENT,  
STUDENT EXPERIENCE, ETC), AN  
D ROLL-OUT PLAN

UNDERGRADUATE PROGRAM DESIGN THINKING DEEP-DIVE

Exploring future curriculum innovations

# Exploring Future Student Needs + Program Innovations



## Core Redesign

**Purpose:** This document serves as a summary of feedback and suggested changes for the Undergraduate Business Core Curriculum. This feedback is based on conversations with over 50 students and 5 recruiters.

As we investigated changes to the BSBA curriculum we received feedback about many parts of the undergraduate experience. Below you will find the major areas identified by students and recruiters.

### Consistency

Academic Quality of Professors – Taking a course can vary greatly depending on who is teaching the course.

Topic Consistency – There doesn't seem to be a base line of consistency of what topics and skills are being taught between the different core classes. Student experience of these courses varied.

Critical thinking level of students – As noticed by recruiters there doesn't seem to be a baseline of quality from undergraduate students. While it's understood that some students will be stronger; the lack of a talent floor is the main concern.

### Communication & Teamwork Skills

Interpersonal – Recruiters stressed the importance of effective in-person and non-verbal communication. Public Speaking class is not adequate.

Professional Development – Recruiters stressed the focus for the development of basic professional development skills. Additionally, club leaders spend more time teaching basic professional development skills instead of getting to work on club projects.

Team Skills – Working in teams for students is often frustrating as some students lack the basic written and verbal skills. Further frustration was the lack of feedback systems for teams and groups and one student having to carry the weight of the entire team.

### Relevance

“Why are we in this course?” – There was a great frustration among students who felt the courses they were required to take lacked relevance to the internships and other course work students were taking.

Focus on Empirical Based Learning – Students stressed the desire to learn things that could be used on their job. If there wasn't evidence supporting a theory it would be more effective to remove it from the course. Additionally, students and recruiters both resonated that it would be more effective to be told what not to do instead of being told what to do; learning *via negative*.

Case Studies – The importance of context for many of the principles and theories we discuss was stressed as highly important. A suggestion for case studies as a primary learning method was suggested by students and recruiters alike. USF students should all have a baseline framework for breaking down a business problem.

### Program Administration

Faculty Advising – Students expressed frustration that the advising given to them by faculty often provided them with out-of-date information.

Wait lists – Much to the same vein as above, students expressed frustrations of being told the professor could waive the wait list and then being told by the office staff that they were not allowed in the course.

Office Communications – Student found the communications from the Undergrad office to be confusing at times. We believe the cause of the confusion is related to unspecific distribution lists for different student populations.

### Curriculum Changes Summary:

Only requiring one Economics course.

Restructuring of pre-reqs (see diagram)

Creation of two Business Fundamental courses

Removal of Core based Capstone – suggest each major incorporate a Capstone

Only include Managerial accounting in Core

Alternatively both could be included based on needs of CPA requirements and accreditation.

Impressions/In closing:

With the myriad of suggested changes we also want to stress the incredible strengths and further growth opportunities of the USF undergraduate business program. The following items were listed as large positives of the school.

Small class sizes & interaction with professors

To enhance this experience ensure professors work well in a high touch environment

Ability to easily complete degree in 4 years and often in less.

With tuition rising across the nation it is imperative the school ensures a 4 year track for students.

Degree customization

The opportunity to shape one's degree for a more personal path was noticed and positively accepted

This was a major factor in reducing the pre-reqs for many of the core classes; allowing students access to elective courses earlier in their program.

Multi-faceted Business education

Opportunities to engage with the community and learning about businesses that are not solely focused on profit.

## Course Topic Coverage for BSBA Core Redesign

### QBA

Modeling  
Analytics  
Forecasting

### Accounting/Finance

Budgeting  
Debit/Credit  
Cost Accounting  
Banks/Loans  
Stocks Bonds  
Financial Management  
Valuations  
Financial Presentation  
Investing  
Personal Finance  
Expense Reports  
Micro-Lending

### Systems

Supply Chain Management  
Work Systems  
Databases  
IT  
Quality Management  
Scheduling  
Project Management  
Production/Workflow analysis  
Business Models (manu, service, start-up)  
Corporate structure  
Outsourcing

### Marketing

Branding  
Fundraising  
Customer Service  
Sales  
Advertising  
Social Media  
Consumer Behavior  
Global Demand  
Public Relations  
Outreach – Brand Awareness  
Product Lifecycle

Development/Creativity

### Legal

Contracts  
HR Law  
Gov. & Biz Relations  
Public Policy  
Legal Structure  
Ethics  
Government Orgs  
Politics  
Non-profits

### Business Foundations 1

Business History  
Corporate Structure  
Promotion Structure  
Family Biz  
Overview of Business Majors

### Business Foundations 2

Team Dynamics  
Negotiation  
Mentoring/Coaching  
Meetings  
Delegating  
Giving/Getting Feedback

### Management

Creativity  
Cultural Diversity  
Working across countries  
Sustainable Biz  
CSR  
Change Management  
Strategy  
Risk Management  
Consulting

Product

**Open Topics**

Cultural Diversity  
Working in Other Countries  
Business History  
Creativity  
Entrepreneurship  
Corporate Structure  
Interpersonal Communication  
Business Writing/Communication  
B2B communication  
Team Dynamics  
Negotiation  
Mentoring/Coaching  
Employee Wellness  
Employee Motivation  
Working from home  
Remote Workspaces  
Change Management  
Meetings  
Promotion structures  
Delegating  
Sustainable Biz  
Cultural Diversity  
Environmental Sustainability  
Working across time zones  
Giving/Getting Feedback  
Risk Management  
CSR  
Biz Major Overview  
Family Biz  
Strategy  
Consulting

**Top 3 Challenges<sup>1</sup> facing the School and its ability to deliver a high-quality BSBA program.**

	n	1st	2nd	3rd
Increased enrollments and the pressures on scheduling enough courses, advising more students, and planning/executing more co-curricular events.	14	6	3	5
The student mix between domestic and international students.	32	15	12	5
The student mix of freshman (4-year) and transfer (2-or-more-year) students.	2	1	0	1
Student preparation upon matriculation to USF.	28	8	15	5
Year-round course offerings.	6	1	4	1
Accreditation standards.	8	2	1	5
Number of degrees at undergraduate level.	5	2	3	0
Number of degrees at graduate level.	5	1	1	3
Increasing teaching commitments at multiple locations.	16	5	4	7
Other	5	4	0	1

**To the best of your knowledge, how well does the BSBA program curriculum:**

	<u>Extremely Well</u>	<u>Well</u>	<u>Not so well</u>	<u>Poorly</u>
Prepare students for employment beyond 5-years out.	4	11	11	4
Prepare students for graduate school.	3	18	7	7
Develop life-long learners.	4	16	12	4
Reflect our Jesuit tradition.	5	16	13	3
Deliver on our small school advantage.	8	19	6	6
Integrate Business Administration content with a Liberal Studies foundation.	5	20	5	6
Develop written communication skills.	1	20	15	5
Develop oral communication skills.	2	21	12	4
Develop critical thinking skills.	3	23	8	6
Develop information literacy.	6	20	8	4
Develop quantitative reasoning	2	17	10	4

**To the best of your knowledge, how well does the BSBA core curriculum emphasize:**

	<u>Too Much</u>	<u>About Right</u>	<u>Too Little</u>
Ethical reasoning.	0	21	12
Social responsibility.	1	22	13
Quantitative based decision-making.	0	23	13
Social contexts of organizations in a global society.	2	22	7
Financial theories and analysis.	1	29	1
Marketing processes and systems.	1	31	13
Organizational dynamics	3	20	8
Political contexts of organizations in global society.	2	13	8
Regulatory and legal contexts of organizations in a global society.	1	21	6
Technological contexts in a global society.	2	18	14
Financial reporting.	0	27	3
Financial markets.	1	28	0
Sustainability.	1	20	13
Systems and processes related to planning/design.	1	17	7
Systems and processes related to production/operations.	0	22	4
Systems and processes related to supply chains and distribution.	2	12	12
Systems and processes related to services management.	1	15	12
Principles of total quality management.	2	16	8

**Agree or Disagree**

	<u>Strongly Agree</u>	<u>Agree</u>	<u>Neither Agree nor Disagree</u>	<u>Disagree</u>	<u>Strongly Disagree</u>
The BSBA program should be structured to allow students maximum freedom to choose their courses.	8	15	4	14	4
The BSBA program should be structured with a minimum of course prerequisites	9	7	8	15	6
When re-imagining the BSBA program and its potential, radical changes should be considered.	8	17	7	5	8
The BSBA program should follow the lead, not set the standard, with respect to other comparable programs.	9	8	14	7	7
Developing a more robust Honors program should be a priority.	7	11	17	4	6
The BSBA program should balance an analytical orientation with a people orientation.	17	15	9	3	1
Changing the curriculum regarding what is taught is futile if we don't focus on how we teach.	16	15	7	7	0
Changes to the BSBA program should support the increasing use of alternative pedagogies (e.g., flipped classroom, hybrid courses, etc.).	13	14	12	2	4
The BSBA program should focus on high impact, in-classroom learning over out-of-the-classroom, experiential, and hands-on learning.	6	10	13	7	6
Any undergraduate BSBA degree should include a substantive liberal studies core.	12	20	6	5	2
USF undergraduates should not declare as BSBA majors until the start of their sophomore year.	6	15	13	6	5

The BSBA core should be structure around themes versus functional disciplines.	6	9	14	7	9
The BSBA should require all students complete targeted, experiential modules.	8	17	12	3	5
The BSBA should be designed to cater to as many student prototypes as possible.	7	11	12	8	7
The SOM does not offer enough minors for non-business majors.	7	10	18	3	7

Currently, the BSBA degree is open enrollment, meaning any student admitted to USF can earn a BSBA degree. If the School of Management was to rethink how it offers the BSBA degree, should the School offer...

A general BSBA with no concentration and open-enrollment.	14
A BSBA with specific concentrations and more selective enrollment (e.g., BSBA-Accounting, etc.)	31
Highly specialized BS degrees with highly selective enrollment (e.g., BS in Accounting)	14
Other	8

Prior to graduation students should be required to complete:

An internship	8
A service learning project	7
A global experience	1
At least two of the above	14
At least three of the above	8
Other	7

#### Demographics: Teaching

Undergraduate only	25
Mix	15
Graduate only	5

#### Demographics: Gender

Male	25
Female	14

#### Demographics: Position

Term	7
Tenure/Tenure-track	30
Adjunct	7

#### Demographics: Time at USF

Less than 3 years	6
3 to 6 years	9
7 to 10 years	4
Over 10 years	26

#### Demographics: Rank

Lecture	9
Assistant	10
Associate	12
Full	14

What are the top three (3) challenges with attracting high-quality / students to the School of Management?	What are the top three (3) challenges with respect to producing / high-quality baccalaureate degree graduates from the School of / Management?	What are three (3) recommendations for making the USF BSBA degree / program more distinctive?	What are three (3) recommendations for increasing the quality of / the BSBA program?	What resources currently available are not being leveraged within / the School of Management and/or the University as a whole?
Distinctive concentrations (hospitality, entrepreneurship, cross-sector management) that attract a significant proportion of incoming students along with 'classic' concentrations in finance, accounting and marketing. / / Too much prescribed courses between the U-core and business core. / / A compelling 'story' as to why USF BSBA over other competitor programs.	Students able to write, speak cogently and persuasively; students prepared to take business statistics and other quantitative courses. / /	Revise the business CORE and better integrate it with a strong liberal arts foundation. / / Greater focus within concentrations that tap into location, Jesuit tradition, and/or business trends.		
School Reputation/Rankings / Connections with industry for career placement after graduation /	Poor quality of many admitted students / Grade inflation and lack of rigor / Lack of internships to make students attractive upon graduation / /	Jesuit Focus / Higher standards must be put in place not just mentioned in ads around the city / Take advantage of our location	Improve the quality of admitted students / Decrease grade inflation / Help the students to learn effectively and to think carefully and also develop their soft skills	Career services
Cutting-edge curriculum; demonstrated capacity to link curriculum with prospective job opportunities; demonstrated capacity to prepare student for academic and professional learning throughout the labor cycle (in effect, to educate students to prepare for future educational opportunities, both formal and informal)	Promotion of goals consistent with the three items above; the private sector must be enlisted to advise our formal committees, supplying their input in producing cutting-edge programs consistent with market trends; such committees should be treated as permanent fixtures, not ad hoc evaluative perspectives	The criteria listed above, if met, would differentiate USF from other institutions, particularly public institutions...that is key to sustaining long-term competitive advantage.	Incentivizing faculty to innovate new programs, new majors, new concentrations; such incentives do not hinge exclusively on financial incentives; human resource accounting devices should be applied to learn faculty interests, tied to producing these differentiated programs (for some faculty, additional research time allocated to this task might be appropriate, for others, unconventional schedules might incentivize sufficiently, and so forth.	Joint faculty teams, aimed at linking curricular goals with the job market and personal incentives tied to producing programs linked with long-term needs of students. Faculty/student relationships must be encouraged long after students complete their degrees.
There is no business person in the administration now and there is no understanding of the history of the undergraduate business program. Things have been tried and failed. For example, reducing the number of business majors to just a few. This resulted in extremely low applications and a rush to reinstate the majors the next year.	Dumbing down the curriculum is not the answer. Employers expect students to be able to actually understand business and perform in their functional areas upon graduation. Touchy-feely stuff is not what companies do. No one gets hired for some of these things suggested earlier. / / The general/university core addresses many of the non-business issues mentioned earlier in this survey.	It does not need to be 'distinctive.' What does distinctive mean? / / Students enroll in the undergraduate program as it is. Watering it down and making our graduates less capable is not the answer.	Do not fix what is not broken. There are 1,300 + undergraduate business majors. This program pays the bills!	There needs to be a business person at the dean level. The current deans are great but they don't have the background in the business program to put things in context.
A realistic looks at how classes actually operate would not encourage high-quality students to attend. / / Too many students are too uninterested. / / Too many students are unprepared. / / Too many students would rather be looking at Facebook. /	Add heavy emphasis on critical thinking. / / Add heavy emphasis on responsibility and follow-through in team settings. / / Create a contract about expectations for SOM students. If students don't want to meet expectations they shouldn't come to SOM.	Heavy emphasis on critical thinking.	Heavy emphasis on critical thinking. / / Require fluency in spoken and written college-level English before taking business classes.	Don't know



		This shouldn't be done in isolation. It should reflect both the USF brand and the SOM brand (when we get around to figuring out what that is).	I haven't seen any data suggesting that it's poor.	
research productivity of faculties / help students finding a job /				
1. We have too many students not adequately prepared to do college level work. / 2. We have too many students who are not sufficiently engaged with or committed to doing college level work. /	1. We need to recruit and admit students better prepared to do college level work. / 2. We need to recruit and admit students who understand what it takes to succeed in college. / 3. We need to hold students to higher standards with respect to written and spoken communication skills.	More distinctive in what specific ways? Our program is already distinctive with respect to features that work against producing high-quality baccalaureate degree graduates.	1. Smaller class sizes. / 2. Recruit and admit better prepared students. /	
Lower standards of acceptance; influx of too many students who barely speak English; lack of academic rigor due to attempts to accommodate marginally qualified students.	More analytical training. More basic blocking and tackling. For example, the business world expects fresh graduates to be whizzes on Excel and other types of technology, yet too few faculty require assignments where such tools are needed.	1. On each student's transcript, show where they ranked in their graduating class. This would help quell concerns over grade inflation. / 2. Even better, on the transcript, beside each grade show the average grade awarded by the professor. / 2. Focus on recruiting high quality students, not just those who will pay full tuition.	See above.	More connections with alums. More training for students on how to find a job and interviewing skills.
1. The undergraduate program is not distinctive. It appears to be a generic business program, much like undergraduate programs developed in the 1970s. / 2. There does not appear to be clear information on student success in finding meaningful jobs at graduation. / 3. There are not enough links between undergraduate programs and jobs / careers / firms. Other programs prepare students to become certified in a number of areas / disciplines. Some think this is short-term, careerist thinking, but it seems to be why students choose a management major rather than, say, sociology.	1. The writing skills of entering students. / 2. The writing and speaking skills of those who have completed USF's core requirements. / 3. The lack of well-developed quantitative skills through USF coursework in math and in management.	1. Create links to professional testing and recognition in multiple disciplines, e.g. CFA, software certifications, etc. / 2. Create multiple 4+1 programs which lead to strong graduate degrees, e.g., finance to MSFA or to MSAN. /	1. Provide opportunity for some smaller classes so students get in-depth feedback on their writing and critical thinking skills. / 2. Strengthen quantitative skill building in USF and SoM cores and ensure that skills are used in SoM core and major courses. / 3. Increase learning about technology.	I don't know.
1. Over concentration of International student body. / 2. Dumbing down of curriculum based on over concentration of International student body. / 3. Radically improving the CPA passage rate.	1. Student retention. / 2. Increased domestic student body. / 3. Improve the CPA passage rate.	More selective admissions. /	1. More selective admissions. / 2. Increased Accounting core courses for CPA bound students. / 3. Mandatory language and writing labs for International students throughout the entire BSBA program.	

Make the building atmosphere more business-like. In other words, we need to improve the aesthetics	Increasing rigor across courses and sections. / increasing the amount of individually assessed assignments (vs. team projects) / Increasing the amount of hands-on experiential assignments/projects across courses/disciplines	Have the students run something. I believe this happens consistently in the hospitality program where students are expected to execute/implement a real business activity/plan. We should have the students run a student store, for example. They can manage everything from selecting the inventory to managing the books. This would be an on-going project in which different students rotate roles in managing the store. Another idea is to plan and implement a marketing campaign with real clients. We often have our students develop plans, but they do not often get an opportunity to see if it works. / / Last, establish a consulting group of students -- local small businesses can get technical assistance in a number of areas -- marketing, accounting, finance, etc. Only seniors can be part of the consulting group and this could be something they can put on their resumes as hands-on experience. It's an internship that we control. /	1. increase the rigor / 2. increase the hands-on experiential assignments / 3. a comprehensive exit exam - they'll need to pass the exam in order to obtain a BSBA degree.	Our Jesuit identity and mission - this is the one thing that we have that other universities in our area do not. Why not make this a distinct aspect of our program by highlighting it.
placement / lack of branding / lack of strategy	no shared understanding of 'high quality' / no systems to produce it / no metrics to assess it	true ability to make strategic choices & bets at SOM / leadership that can bring faculty & staff together to create and maintain distinction / revenue model has to change: severe tuition dependence -> pressure to admit for \$\$\$	see answer #2 above	full time faculty / adjuncts / staff / students / alumni / business and organizational partners / (flip the question: are there any assets that "are" being properly leveraged?)
Top 100 ranking which is very important to high school counselors and parents.	Too many prerequisites. / /	Less prerequisites. / Provide maximum flexibility of curriculum sequencing to allow most students to graduate in 4 years.		
competition within the Bay Area, cost of living in SF	students' lack of awareness of competition in the marketplace,	mandatory foreign language and study abroad requirements	smaller classes and more interface with the business community	the business community in one of the most dynamic business environments in the world
	People and organizational skills.	Offer all classes online and hybrid in addition to traditional classes.	Offer more online classes / Give students more choices / Offer more human skills courses e.g. career development, soft skills	
Global reputation of the faculty and SOM / Connections to careers on a national and international level, not just in San Francisco / Recognition by industry that we provide more than just future employees	Not enough courses taken in the majors / Expectations of students to gain a management position on graduation / Too much pressure on international students to complete a graduate degree after getting a BSBA		Continue to hire quality faculty with industry experience / Expand our recruitment of students across the USA / Give the Beijing and Bangkok offices more support	The international offices in Beijing and Bangkok are not being supported enough / Get away from the paid Study Abroad programs and do more student exchange with reciprocal agreements to diversify the student mix

#1 - In regard to graduate programs, an almost total lack of an alumni network that hires graduates. Why should someone spend tens of thousands of dollars and then be told "Good luck on finding a job! We don't have companies lining up at the door to hire you. Oh, and by the way, we will be contacting you to join our alumni association and support us financially." / #2 - See #1 / #3 - See #1	1. Lack of understanding on how people learn. Until that happens, many faculty will continue to teach the old pedagogy of lecture and Death-by-PowerPoint / 2. Lack of understanding how to deliver content effectively (flipped classrooms, experiential learning, etc.) / 3. No emphasis on teaching ability. We continue to hire faculty on their 'research' abilities but who are horrible in the classroom.	Change the entire way of thinking about the program. What about students having ONE 16-unit class per semester? It could be co-taught by three or four faculty, it would be case/problem-based, and the various disciplines could teach the subject matter (for example, a Wal-Mart case) from multiple perspectives. / / See: The Evergreen State College in Olympia, WA for an example where this works. Evergreen has been consistently ranked in the top 3 - 5 liberal arts public schools in the nation (and they do not have grades, either)	1. Focus on educating the faculty on teaching. / 2. Provide HUGE student support for creating new ways of teaching (such as a flipped classroom) and providing technology to help in improving learning outcomes. / 3. Close the loop on learning outcomes and whether or not faculty are meeting the university and school's goals. When faculty are made aware of how much the students lack the learning objectives of the school as evidenced in their own classrooms, and this area is focused on by department chairs and the dean, then perhaps the faculty will change how they 'teach.'	Hire a lot more student assistants. To expect faculty to learn new things on their own is not going to happen. The entire way of redoing the business of education needs to addressed.
career placement,	apathetic faculty who are not committed to the students or the program, lack of rigor, lack of proper career guidance	Unique electives, required internships and required attendance at special talks	Review both tenure and tenure track faculty course content, standardized finals for the core business classes so we are assured students are ready for the next level, more opportunity for electives for students	our location on hilltop and 101 Howard.
--Not well-known (weak or poor reputation) and it's easy to get in (related to poor reputation) -- students told me. It seems that reputation building is key for USF -- need much work on the fundamental understanding about 'and' investment in building un	Good input, good output: need to build reputation, then, attract better quality students. / Some (not many, so far) students we get are unbelievably uncorrectable, and we're not parents or police. USF should NOT baby-sit students -- they don't learn sufficiently to be independent (relatively, compared to students at other universities), because they're 'served' for all sorts of needs. Being nice/encouraging and being baby-sitting all the time are totally different. e.g.) The student should learn to keep appointments. When they don't show up, staff/faculty don't try to correct them, or don't punish them -- out of fear that they might hate us, give us bad SUMMA score??? So, some students take it for granted that USF staff/faculty are 'at their service any time.' We should let them learn how to fish; we shouldn't give them fish all the time.	-- Do NOT follow, copy, imitate other schools (e.g., Stanford, Berkeley). This is the worst thing that SOM can do, because we're Very different. Instead, we should figure out (I mean, really figure out) what we're good at, currently. I don't even know,	this question is related to the one above: "What are three (3) recommendations for making the USF BSBA degree program more distinctive?" Please see my answer above.	I don't know what's available. All I know based on my observations is, the admin size is becoming gigantic, while it does little to reputation building or student learning. Haven't seen this size of admin in any other universities I know. Now, it seems SOM is trying to make faculty do more CASA work?! Time is precious for faculty - research takes time, teaching prep takes time, and these build reputation, not service. Balancing requirement makes USF, SOM be mediocre at best.
Engaged faculty (highly motivated to teach and perhaps in a different manner than they are accustomed); breaking down silos; making sure diversity in student body is not a detriment to anyone-- consistent quality of students in classroom	Need to develop good thinkers who have business skills; Develop good communicators; have some practical experience during their years of matriculation	Mandatory internships for every student; Ability to converse intelligently about business matters/problems; Able to work well in groups	innovative teaching; mandatory internships; Somehow bring the Jesuit element into the Business school experience	

Lack of endowment to fund scholarships for top students (we are expensive). / Although we have a good reputation, we are still not considered 'top tier' (like Stanford, the Ivy League Schools, etc.) / Lack of 'signature' programs that create a 'halo' effect for other programs and the School of Management as a whole. /	Communication challenges with some international students / Students not completing courses in sequence / Students too focused on "checking the boxes" (completing all the required courses) versus really learning something	Focus in on key strengths to create some 'signature' degree programs / Improve outreach to the business community and placement of our students with San Francisco/Silicon Valley firms. / Require an internship, full-time service learning commitment, or true global experience (versus students studying abroad through a U.S. sponsored program with other U.S. students and U.S. faculty that just happens to be in Paris so they can sight-see on the weekends and after class).	Ensure that students have the quantitative skills employers demand through an assessment tool. / Ensure that students engage in meaningful class projects and then showcase the best of these projects with recorded presentations to the appropriate business community.	
	Poorly prepared int'l students (7/10 not prepared for university courses) / Lack of rigor in writing assignments / Lack of integration of quantitative methods throughout curriculum	We have a global mission yet no requirement for int'l business (?) / Leverage location to place students in meaningful internships and future jobs / Be more rigorous in written assignments (but that's hard w/ so many poorly prepared int'l students)	Be more selective or provide more pre-University language / Faculty must agree on and adhere to standards for written work / Provide ways for all students to gain relevant work experience	SOM Board of Advisers, Trustees, (also SOM alumni)
Administration seeking tuition.	Lack of student preparation and competence.	Being Jesuit.	Being Jesuit.	Being Jesuit/Catholic.
We don't know who we are as a school....and that's who we are attracting / More focused high-profile "successes" of students and alums in each field we are offering: Can prospective students identify with our alums and their successes? / / / /	require field experience as part of graduation / more worldly "application" of principles taught / more units in the majors and fewer B-Core	more units in the majors and fewer B-Core / require a second language / require field experience as part of graduation / /	more units in the majors and fewer B-Core / require a second language / require field experience as part of graduation	faculty's Industry connections ---for career insights and guidance.
good ranking, quality of teaching, job placement	priority focus of SOM administrator, caliber of instructor and student co-curriculum, knowledge & skills acquired for job placement	structured internship / experiential activities applicable to the major, semester abroad, excel in a few majors (ranking, curriculum offering),	more rigor, better students, better student preparation - especially for international students. Seminars at the start of freshman year to help them acclimate to college study	Asia Pacific Center, cross-discipline research and curriculum programming
I don't know that we are having problems attracting students, are we?	Input creates output. We are not selective enough. We play a numbers game not a quality game.	Why should it be distinctive? If we do a great job giving a basic BSBA degree, then we wouldn't have to be distinctive. / Our quality would be our distinction.	Better teaching. We put our best faculty in the graduate programs. / Better incoming students (more motivated to do well and able to speak and write English). / Better support for faculty to be supportive of students.	I don't know anything about resources. All I know, is that we keep hiring people, but less gets done and people are less happy and involved.
We are overly concerned about obtaining students who can pay tuition, without giving equal consideration to what prerequisite skills students need. / We don't really believe we deserve high-quality students and so we don't sufficiently present ourselves as a high-quality school. / Some of us, as instructors, are not constantly pushing ourselves to be as relevant as we may need to be in our fields.	We need to be clear about how we develop and support our students' critical thinking in general. / We need to understand how to best teach/facilitate students in developing their critical thinking skills and more integrated ways of thinking.			We are not leveraging our San Francisco location sufficiently to incorporate new ways of teaching and instruction and linkages to social justice in the Jesuit tradition.

	Lack of focus on core competencies of skills of writing, speaking and critical thinking across the curriculum.		Increased focus on core competencies of skills of writing, speaking and critical thinking across the curriculum. / Diverse faculty. / Practitioners as well as academics.	
Lousy teaching, that leads to lousy word-of-mouth and disengaged alumni. / Absence of a modern, relevant curriculum.	Many courses have content that is out of date or utterly out of touch with the current practice of business / Poor quality teaching by many full-time faculty. / Institutional inability to develop high-quality adjuncts to deliver selected electives. /	Establish an Associate of Assistant dean dedicated solely to BSBA (not to other UG programs--distraction). / Hire a BSBA dean with leadership and change management skills, who understands quality. / Have the distinctiveness chosen/driven by a high-level business advisory board, not by faculty. /	Have a Strategy that Prioritizes a small number of things we will excel at, then focus resources, training, attention, and incentives on those things. / Make a step-change in quality of teaching and learning, with "quality" being broadly defined. / Hire faculty who can are able and desire to engage substantively with business, and support them in doing so.	Professionals in business who could serve as effective adjuncts, if they were trained, supported, and developed in sustained fashion. / The high standards of junior faculty, who are routinely punished for excellence. / The continued employment of too many superannuated senior faculty who have a duty to their students to retire.
The low quality of current students.	So many international students with inadequate language skills.	Higher standards / Rewarding teaching innovation / Limiting number of international students.	see above	Classes have become way too large to deliver the kinds of hands on land intimate learning environment that we have promised.
Rankings and placement of graduates / Innovative pedagogy and delivery / Distinguishing ourselves as a Jesuit Institution and how that differentiates us	Language Skills of not just the non-native speakers but everyone. Many students can't write or speak well.	Focus on ethics and sustainability / Focus on better communication skills (reading, analysis, framing, speaking, writing, presentations) / Focus on building a personal vision for the future so they have something to link their learning into. /	Publish some kind of evaluation of professors so we are more motivated to engage / Attract students who can read and speak English well / Build in a clear role for Jesuit pedagogy and values and provide support for professors who need help instituting it. /	
Competition from other universities	Student preparation for those who arrive at USF for degree completion program; maintaining high standards in the face of pressure to move students through to graduation			
SOM 's image is not distinctly unique among its competitors. / Our university wide campaign failed to capture the essence of who we are. / Course offerings which frequent changes on top is its limited depth and scope is confusing for students.	SOM must work harder on developing critical and analytical thinking among our students. /	USF has to position itself clearly in one discipline. For example, Chicago Business School is known for its Economics program while Kellogg is for Marketing. USF tries to be everything for everyone. We need to decide what we want to be known for (aside from USF being a good school of Law and Nursing) and communicate it effectively to our target market. We have to decide what area of excellence we want to focus on instead of just being a generic business school which does not make USF stand out from its competitors.	Start offering relevant courses in today's service oriented global economy. / Communicate SOM's programs with more focus on who we are. / Give professionally qualified faculty a chance to get a full-time post (non-tenured) on the merits of their teaching performance and real work-place accomplishments. Their actual work place experience add value to the curriculum that many students appreciate.	USF operates on silos. Cross-department collaboration will bring more students to SOM and vice versa. / Some dept. chairs outside of one's dept. is close to the idea of accepting another excellent resource faculty from other units. /

Limited resources directed to the undergraduate program and services. The school's myopic obsession with the MBA programs has left undergraduates underserved and exploited for their tuition dollars. This is a shameful state of affairs.	Delivering appropriate forms of academic tracking and support.	Stop trying to compete with R1s and get on with the business of a liberal arts grounded education in management that provides applicable skills for survival and value-driven perspectives for happiness.	Offer courses students need and want, not just what the faculty wants to teach.	Talented individuals.
Reputation of the school among students and recent grads	a solid curriculum that combines in class and out of class learning to produce a well-rounded individual with a passion		evaluation by alums of their learning experiences here	
financial aid, quality of program, quality of services and advisement	Need more full time faculty, stronger administrative systems, time for faculty to develop curriculum	Ignatian focus, skills for understanding the private, nonprofit and public sectors, support excellent teaching of well-prepared students	Have each student from China fully prepared, support faculty time for course development, connect with the talent of all in School	Talent of all the faculty, systems thinking in designing administrative support,

My Report

Last Modified: 09/28/2014

1. We appreciate your willingness to participate in this survey and share your opinions on your experience in the undergraduate business program at the University of San Francisco. Your feedback will help the university further develop and re-imagine the program for the next generation of business students. How well did your bachelor's degree in business...?

#	Question		Extremely Well	Well	Not so Well	Poorly	Total Responses	Mean
1	Prepare you for employment beyond 5 years of graduation		6	28	12	5	51	2.31
2	Prepare you for graduate school		2	16	12	5	35	2.57
3	Develop you to be a life-long learner		15	27	9	1	52	1.92
4	Reflect USF's Jesuit Catholic tradition		5	31	13	4	53	2.30
5	Provide a small school experience		27	24	3	0	54	1.56
6	Integrate business administration content with a liberal studies foundation		10	29	11	2	52	2.10

Statistic	Prepare you for employment beyond 5 years of graduation	Prepare you for graduate school	Develop you to be a life-long learner	Reflect USF's Jesuit Catholic tradition	Provide a small school experience	Integrate business administration content with a liberal studies foundation	
Min Value	1	1	1	1	1	1	
Max Value	4	4	4	4	3	4	
Mean	2.31	2.57	1.92	2.30	1.56	2.10	
Variance	0.66	0.66	0.54	0.56	0.36	0.56	
Standard Deviation	0.81	0.81	0.74	0.75	0.60	0.75	
Total Responses	51	35	52	53	54	52	

2. Thinking about the business skills you use most often at work and at home, how well did your undergraduate courses at USF develop your...

#	Question	Extremely Well	Well	Not so Well	Poorly	Total Responses	Mean
1	Written communication skills	18	28	7	1	54	1.83
2	Oral communication skills	19	29	6	0	54	1.76
3	Critical thinking skills	18	31	4	1	54	1.78
4	Information literacy	13	36	5	0	54	1.85
5	Quantitative reasoning	12	28	9	5	54	2.13

Statistic	Written communication skills	Oral communication skills	Critical thinking skills	Information literacy	Quantitative reasoning
Min Value	1	1	1	1	1
Max Value	4	3	4	3	4
Mean	1.83	1.76	1.78	1.85	2.13
Variance	0.52	0.41	0.44	0.32	0.76
Standard Deviation	0.72	0.64	0.66	0.56	0.87
Total Responses	54	54	54	54	54



3. In your opinion how important are the following knowledge areas to a business degree student?

Question	Extremely Important				Somewhat Important				Neither Important Nor Unimportant				Somewhat Unimportant				Not Important at All				Total Responses		Mean
1 Global awareness	25				17				1				0				0				42		1.59
2 Social responsibility	17				16				1				3				0				42		1.68
3 Decision-making using quantitative information	27				15				1				1				0				42		1.43
4 Decision-making using qualitative information	27				12				1				1				0				42		1.45
5 Social contexts of organizations in a global society	13				20				1				2				1				42		1.95
6 Political contexts of organizations in a global society	12				20				1				1				0				42		1.98
7 Technological contexts of organizations in a global society	16				16				1				0				1				42		1.90
8 Economic contexts of organizations in a global society	22				16				1				0				0				42		1.57
9 Legal contexts of organizations in a global society	14				20				1				0				1				42		1.90
10 Financial markets	23				14				1				0				0				42		1.57
11 Financial reporting	20				19				1				1				0				42		1.52
12 Financial markets and analysis	24				12				1				1				0				42		1.60
13 Marketing processes and systems	16				19				1				1				0				42		1.81
14 Individual-based concepts, (such as motivation, power, perception)	21				17				1				1				1				42		1.67
15 Team dynamics	26				11				1				1				0				42		1.52
16 Leading versus managing	24				13				1				1				1				42		1.62
17 Organization dynamics (such as structure, organizational culture)	20				16				1				3				0				42		1.74
18 Sustainability	14				17				10				0				1				42		1.98
19 Systems and processes related to planning and design	15				18				1				2				0				42		1.90
20 Systems and processes related to production	10				23				1				2				0				42		2.02
21 Systems and processes related to supply chains and distribution	10				23				1				2				0				41		2.00
22 Systems and processes related to services management	14				19				1				3				0				42		1.95
23 Entrepreneurial ventures	21				17				1				0				0				42		1.60
24 Small versus large business/organization differences	22				11				1				1				0				41		1.68
25 Technological software and applications	26				15				1				0				0				42		1.40

Statistic	Ethical reasoning	Social responsibility	Decision-making using quantitative information	Decision-making using qualitative information	Social contexts of organizations in a global society	Political contexts of organizations in a global society	Technological contexts of organizations in a global society	Economic contexts of organizations in a global society	Legal contexts of organizations in a global society	Financial markets	Financial reporting	Financial markets and analysis	Marketing processes and systems	Individual-based concepts, (such as motivation, power, perception)	Team dynamics	Leading versus managing	Organization dynamics (such as structure, organizational culture)	Sustainability	Systems and processes related to planning and design	Systems and processes related to production	Systems and processes related to supply chains and distribution	Systems and processes related to services management	Entrepreneurial ventures	Small versus large business/organization differences	Technological software and applications
Min Value	-	-	1	1	-	1	1	1	1	-	1	-	1	1	1	-	1	1	1	1	1	1	1	-	
Max Value	5	4	4	4	5	4	5	5	5	5	4	5	4	5	4	5	4	4	4	4	3	4	5		
Mean	1.50	1.88	1.43	1.45	1.95	1.98	1.90	1.57	1.90	1.57	1.62	1.60	1.81	1.67	1.52	1.62	1.74	1.98	1.90	2.02	2.00	1.95	1.60	1.68	
Variance	0.35	0.94	0.45	0.50	0.80	0.61	0.62	0.45	0.72	0.49	0.49	0.54	0.60	0.76	0.60	0.60	0.78	0.80	0.72	0.61	0.60	0.78	0.44	0.72	
Standard Deviation	0.59	0.92	0.67	0.71	0.91	0.78	0.91	0.67	0.85	0.70	0.70	0.80	0.77	0.87	0.77	0.91	0.89	0.90	0.85	0.78	0.77	0.88	0.66	0.85	
Total Responses	42	42	42	42	42	42	42	42	42	42	42	42	42	42	42	42	42	42	42	42	41	42	42	41	

4. In your opinion how important are these reported "future work skills of 2020" (source: [cdn.theatlantic.com](http://cdn.theatlantic.com))?

Question	Extremely Important	Somewhat Important	Neither Important Nor Unimportant	Somewhat Unimportant	Not Important at All	Total Responses	Mean
Ability to determine the deeper meaning and significance of what is being expressed	28	10	2	0	1	41	1.44
Ability to connect with others in a deep and direct way, to send and stimulate reactions and desired interactions	21	14	5	0	1	41	1.68
Proficiency at thinking and coming up with solutions and responses beyond that which is rote or rule-based	27	13	1	0	0	41	1.37
Ability to operate in different cultural settings	25	12	3	1	0	41	1.51
Ability to translate vast amounts of data into abstract concepts and to understand data based reasoning	27	10	3	1	0	41	1.46
Ability to critically assess and develop content that uses new media forms, and to leverage these media for persuasive communication	19	18	4	0	0	41	1.63
Literacy and ability to understand concepts across business disciplines	28	12	1	0	0	41	1.34
Literacy and ability to understand concepts across non-business-related disciplines	21	16	4	0	0	41	1.59
Ability to represent and develop task and work processes for desired outcomes	24	16	1	0	0	41	1.44
Ability to discriminate and filter information for importance and understanding	31	9	1	0	0	41	1.27
Ability to work productively, drive engagement, and demonstrate presence as a member of a team, especially a virtual team	24	13	3	1	0	41	1.54

Statistic	Ability to determine the deeper meaning and significance of what is being expressed	Ability to connect with others in a deep and direct way, to send and stimulate reactions and desired interactions	Proficiency at thinking and coming up with solutions and responses beyond that which is rote or rule-based	Ability to operate in different cultural settings	Ability to translate vast amounts of data into abstract concepts and to understand data based reasoning	Ability to critically assess and develop content that uses new media forms, and to leverage these media for persuasive communication	Literacy and ability to understand concepts across business disciplines	Literacy and ability to understand concepts across non-business-related disciplines	Ability to represent and develop task and work processes for desired outcomes	Ability to discriminate and filter information for importance and understanding	Ability to work productively, drive engagement, and demonstrate presence as a member of a team, especially a virtual team
Min Value	1	1	1	1	1	1	1	1	1	1	1
Max Value	5	5	3	4	4	3	3	3	3	3	4
Mean	1.44	1.68	1.37	1.51	1.46	1.63	1.34	1.59	1.44	1.27	1.54
Variance	0.65	0.77	0.29	0.56	0.55	0.44	0.28	0.45	0.30	0.25	0.55
Standard Deviation	0.81	0.88	0.54	0.75	0.74	0.66	0.53	0.67	0.55	0.50	0.74
Total Responses	41	41	41	41	41	41	41	41	41	41	41

5. Considering the USF undergraduate business degree, to what extent do you agree or disagree with the following statements?

#	Question	Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Strongly Disagree	Total Responses	Mean
1	The business program should be structured to allow students maximum freedom to choose their courses	11	9	11	7	1	39	2.44
2	The business program should be structured with a minimum of course prerequisites	6	19	6	8	0	39	2.41
3	When re-imagining the business program and its potential, radical changes should be considered to the curriculum	9	12	10	8	0	39	2.44
4	The business program should follow the lead, not set the standard, with respect to other programs	5	7	11	9	7	39	3.15
5	Developing a robust Honors program should be a priority	5	8	20	3	3	39	2.77
6	The business program should balance an analytical orientation with a people orientation	11	18	6	3	1	39	2.10
7	When re-imagining the business curriculum, attention should also be directed at how the curriculum is taught	19	17	3	0	0	39	1.59
8	Curriculum changes should support the increasing use of alternative pedagogies (e.g., flipped classroom, hybrid courses, etc.)	8	15	10	4	2	39	2.41
9	The business program should focus on high impact, in-class learning over out-of-the-classroom, experiential, and hands-on learning	9	6	12	10	2	39	2.74
10	Any undergraduate business degree should include a substantive liberal studies core	5	16	13	5	0	39	2.46
11	USF undergraduates should not declare as business majors until their sophomore year	7	11	10	7	4	39	2.74
12	The business program core should be structured around themes instead of functional disciplines	5	5	23	6	0	39	2.77
13	Offering business minors to Arts & Sciences majors enhances business students' experience	14	13	5	5	2	39	2.18
14	A large international student population enhances the entire student experience	5	11	11	7	5	39	2.90

Statistic	The business program should be structured to allow students maximum freedom to choose their courses	The business program should be structured with a minimum of course prerequisites	When re-imagining the business program and its potential, radical changes should be considered to the curriculum	The business program should follow the lead, not set the standard, with respect to other programs	Developing a robust Honors program should be a priority	The business program should balance an analytical orientation with a people orientation	When re-imagining the business curriculum, attention should also be directed at how the curriculum is taught	Curriculum changes should support the increasing use of alternative pedagogies (e.g., flipped classroom, hybrid courses, etc.)	The business program should focus on high impact, in-class learning over out-of-the-classroom, experiential, and hands-on learning	Any undergraduate business degree should include a substantive liberal studies core	USF undergraduates should not declare as business majors until their sophomore year	The business program core should be structured around themes instead of functional disciplines	Offering business minors to Arts & Sciences majors enhances business students' experience	A large international student population enhances the entire student experience
Min Value	1	1	1	1		1		1	1	1	1	1	1	1
Max Value	5	4	4	5		3		5	5	4	5	4	5	5
Mean	2.44	2.41	2.44	2.77		1.59		2.41	2.74	2.46	2.74	2.77	2.18	2.90
Variance	1.36	0.99	1.15	1.08		0.41		1.20	1.51	0.78	1.56	0.76	1.47	1.52
Standard Deviation	1.17	0.99	1.07	1.04		0.64		1.09	1.23	0.88	1.25	0.87	1.21	1.23
Total Responses	39	39	39	39	39	39	39	39	39	39	39	39	39	39

6. If you were to design an undergraduate business degree curriculum, how would distribute the coursework over the following broad categories? (The total allocation should add up to 100.)

#	Answer	Min Value	Max Value	Average Value	Standard Deviation
1	Liberal arts core	0.00	40.00	15.01	9.45
2	General business core	0.00	60.00	24.99	13.72
3	Specialized business courses related to one's major or specialization	0.00	75.00	30.68	15.23
4	Business electives not related to one's major or specialization	0.00	30.00	14.84	6.99
5	Non-business electives	0.00	16.00	7.08	4.55

7. Prior to graduation, do you believe the next generation of USF business students should be required to complete:

#	Answer	Bar	Response	%
1	At least one internship	<div></div>	5	14%
2	At least one service learning project	<div></div>	1	3%
3	At least one global experience (I.e., semester abroad, intensive academic global immersion)	<div></div>	0	0%
4	At least two of the above	<div></div>	21	57%
5	All three	<div></div>	10	27%
Total			37	

Statistic	Value
Min Value	1
Max Value	5
Mean	3.81
Variance	1.60
Standard Deviation	1.27
Total Responses	37

8. USF is committed to creating a distinctive undergraduate business program. In your view, what three adjectives would best describe your vision for a distinctive undergraduate business program? The USF undergraduate business program should be...

Click to write Choice 1	Click to write Choice 2	Click to write Choice 3
influential	collaborative	well-rounded
tech-oriented	competitive	reputable
informative	inclusive	exciting
Global	Creative	Independent
Practical	Comprehensive	Conscious
Smart	First-rate	Distinguished
Transformative	Global	Social Justice Centered
focused more on employment	focused on current technology + tools	global
robust	creative	challenging
innovative	fun	unique
Quantitative	Analytical	Data-focused
innovative		
quantitative	rigorous	competitive
more demanding	a top 10 undergrad business school on the West Coast	develop students to be literate in many aspects of finance and business
unique	rigorous	supported by industry
Global	Cross-functional	Enlightening
competitive, hardworking	clever	dependable
Useable business skills	Ability to get a job after graduation	Improve schools national ranking
Technological	Strategic	Diplomatic
Innovative	Techy	Entrepreneurial
Stimulating	Inspiring	Rewarding
results oriented	imaginative	unique
smart	ethical	business savvy
Entrepreneurial oriented	Diverse	Rigorous
educational	relevant	modern
broad	comprehensive	hands-on
Relevant	Pragmatic	Social
Thorough	Analytical	Relevant
Creative	Principled	Entrepreneurial
Creative	Innovative	Inspiring
quantitative	financial literacy focused	internship and externship focused
prepare for real world	assist them to get a job	align them with companies
Statistic	Value	
Total Responses	32	

9. Overall, how satisfied are you with your degree in business from the University of San Francisco?

#	Answer	Bar	Response	%
1	Very Dissatisfied		1	3%
2	Dissatisfied		0	0%
3	Somewhat Dissatisfied		3	8%
4	Neutral		3	8%
5	Somewhat Satisfied		12	32%
6	Satisfied		12	32%
7	Very Satisfied		7	18%
	Total		38	

Statistic	Value
Min Value	1
Max Value	7
Mean	5.34
Variance	1.80
Standard Deviation	1.34
Total Responses	38

10. Overall, how connected do you feel to the University of San Francisco?

#	Answer	Bar	Response	%
1	Very Disconnected		3	8%
2	Disconnected		1	3%
3	Somewhat Disconnected		4	11%
4	Neutral		3	8%
5	Somewhat Connected		12	32%
6	Connected		7	18%
7	Very Connected		8	21%
	Total		38	

Statistic	Value
Min Value	1
Max Value	7
Mean	4.92
Variance	3.10
Standard Deviation	1.76
Total Responses	38

11. After completing this survey, will your feelings of connectedness...

#	Answer	Bar	Response	%
1	Decrease		0	0%
2	Remain the same		32	84%
3	Increase		6	16%
	Total		38	

Statistic	Value
Min Value	2
Max Value	3
Mean	2.16
Variance	0.14
Standard Deviation	0.37
Total Responses	38

12. How likely is it that you would recommend the University of San Francisco undergraduate business program to a family member, friend or colleague (with 0 representing "Not at All Likely" and 10 representing "Extremely Likely")?

#	Answer	Bar	Response	%
0	0		1	3%
1	1		0	0%
2	2		0	0%
3	3		1	3%
4	4		3	8%
5	5		5	13%
6	6		7	18%
7	7		4	11%
8	8		5	13%
9	9		5	13%
10	10		7	18%
Total			38	

Statistic	Value
Min Value	0
Max Value	10
Mean	6.97
Variance	5.59
Standard Deviation	2.37
Total Responses	38

13. What is your highest degree earned to date?

#	Answer	Bar	Response	%
1	Bachelors	<div></div>	27	71%
2	Masters	<div></div>	11	29%
3	Doctorate		0	0%
	Total		38	

Statistic	Value
Min Value	1
Max Value	2
Mean	1.29
Variance	0.21
Standard Deviation	0.46
Total Responses	38

14. Time since undergraduate degree

#	Answer	Bar	Response	%
1	0-2 years	<div></div>	12	32%
2	3-5 years	<div></div>	16	42%
3	6-8 years	<div></div>	6	16%
4	9-12 years	<div></div>	3	8%
5	13-20 years	<div></div>	1	3%
6	11-20 years		0	0%
7	Over 20 years		0	0%
	Total		38	

Statistic	Value
Min Value	1
Max Value	5
Mean	2.08
Variance	1.05
Standard Deviation	1.02
Total Responses	38

15. I identify as

#	Answer	Bar	Response	%
1	Male	<div></div>	24	63%
2	Female	<div></div>	14	37%
3	Prefer not to state		0	0%
	Total		38	

Statistic	Value
Min Value	1
Max Value	2
Mean	1.37
Variance	0.24
Standard Deviation	0.49
Total Responses	38

16. I am

#	Answer	Bar	Response	%
1	20 years of age or younger		0	0%
2	21-29 years of age		25	66%
3	30-39 years of age		6	16%
4	40-49 years of age		5	13%
5	50-59 years of age		1	3%
6	60-69 years of age		0	0%
7	70+ years of age		1	3%
8	Prefer not to state		0	0%
	Total		38	

Statistic	Value	
Min Value	2	
Max Value	7	
Mean	2.63	
Variance	1.21	
Standard Deviation	1.10	
Total Responses	38	

17. I identify as

#	Answer	Bar	Response	%
1	African-American or Black		1	3%
2	American Indian or Indigenous		1	3%
3	Asian / Pacific Islander		12	32%
4	Hispanic or Latino		2	5%
5	White/Caucasian		19	50%
6	Other		1	3%
7	Prefer not to state		2	5%
	Total		38	

Statistic	Value	
Min Value	1	
Max Value	7	
Mean	4.26	
Variance	1.71	
Standard Deviation	1.31	
Total Responses	38	



18. Thank you for completing the survey! Please feel free to provide any additional thoughts or comments.

Text Response	
I appreciate this survey being sent to alumni, and hope the results are taken into consideration when re-structuring curriculum and the administration in the school.	
Go Dons!	
Some of the best learning experiences I had in my adult life were at USF. I only wish I could have engaged in campus extracurricular activities and made more connections. That is in no way reflective of USF, because it is indeed an excellent environment to participate in and make meaningful connections.	
Thanks! -Tom Roche	
- Include a course on negotiation for undergraduates. This would be immensely valuable. Help them understand their worth in the marketplace - Strongly suggest overseas course work and experience	
Dear USF SOM, It is essential that our undergraduate business curriculum require a higher level of mathematics and statistics. Specifically, calculus for math, and regression analysis for statistics. I feel strongly about this issue because when I attended graduate school, I found myself behind many of my peers, most of whom had graduated from UC and other private institutions like USF. I was fortunate to be able to have the time to go back to school and develop an advanced mathematical and statistical skills, but I fear that other USF business graduates might not have the same luxury when experiencing that they are not prepared as others in the job market or workforce. Working for the University of California, I have come to experience how the faculty strive for excellence in the curriculum. Reflecting upon my experience at USF, I struggle to understand why we cannot work to have standards equal to that of UC, especially when, based on campus-wide admissions profiles, USF meets or exceeds the classes accepted at several of the UC campuses. Even our peer Santa Clara University has higher mathematics and statistical requirements in their undergraduate business program. Why should their graduates be more prepared than ours? Furthermore, this is important because the demand for data analysis and quantitative reasoning is high in both the private and public sector. These skills will only become more desired in the future. I believe it is USF's obligation to prepare their students to be competitive locally, nationally and globally. Thank you for your consideration of my comment.	
Please add more math and computer science to the core business curriculum. Undergrads who don't have expertise in higher math and programming get trounced in the modern working world.	
If there is one take away from this survey that you should focus on it is the fact that the university has no process established for referral, reference or introduction to industry. I have tried for a month to find a faculty or administration members that could provide an introduction to a USF adjunct professor that is openly advertising his organizations needs. To date, I've talked with my Associate Director of Counseling, Program Director, and Vice Provost about an introduction, all of which have offered help, but to date have no answers about how they or their faculty can do any type of introduction. One of the reasons I choose USF was the school's reputation and alumni association's involvement with local industry. I have been very disappointed in the fact that a simple virtual introduction via email couldn't be facilitated in the absence of any personal connection between the school and the adjunct. I realize this is a small issue in the overall management of the university, but it is a huge issue to my career, and my ability to leverage the education I have received at the University of San Francisco. One of the unspoken benefits of being an alumnus is the access to other members of the university community. I have spent much of the past 30 days trying to get an introduction to an active adjunct as a member of the university community. He is a key decision maker for an opportunity which I am uniquely qualified, and teaches within my school, works within my industry and is the hiring manager for several opportunities within my discipline. If I were a mediocre student I could understand the perceived reluctance, however I carry a GPA of 3.96, and this request seems to be some sort of political hot potato.	
What I hope to see in any grad is the ability to think and analyze, a solid foundation in a primary area, and some exposure to other fields to help them integrate with their peers. Every job has some job learning to do that no college can teach, so the more they are able to absorb and think for themselves and see their place in the larger picture the better they will do.	
Need to improve program and ranking so students can have some respect from companies when working in the world	
All future curriculum should be technologically focused. The curriculum should be strategically planned with modern tools, software, and concepts, so that each business degree can help the student diplomatically maneuver through the fast moving local job market. The graduate should apply learned technological and business concepts after being hired. Social media has really changed many job functions and will continue to disrupt most, if not all, businesses for many years.	
I got into Wharton with a full-ride scholarship! Thank you, USF!!!	
The week before my graduation, I had the opportunity to speak with Father Privett at a graduation luncheon. He asked me if I had a job lined up for post-graduation and I said no. He asked if I had done an internship during my time in college and I also said no. He said that was why I didn't have a job lined up. Until this day, I am baffled as to why they wouldn't make it a requirement to complete an internship, especially if it is something that Fr. Privett felt so strongly about. I am sad that that is my only impression of him and what sticks out to me the most when I think of my last days at USF. The job placement program and mentoring program also needs to be much more involved for seniors.	
Loved going to USF. Met some awesome professors and classmates. While I did make friends with many international students, I don't think I learned from them all that much. Maybe 1 or 2 spoke out their opinions and contributed to classroom discussions. The rest hardly interacted. I'm sure it's a cultural thing though and something USF can't really do anything about. I also felt that the international community was really intertwined/connected which allowed for cheating to occur. My astronomy class's test were set up so that we'd wait in line to get a test with an associated seat number. One time, on test day, two international students coordinated to be able to sit next to each other. They talked throughout the exam. The professor didn't administer the exam, someone (TA?) else did. All he did after the 5th warning was separate them. Had it have been non international students I'm sure he would have ripped the test in half. Similar things happened in other classes. On a different note, I really think that the business curriculum should be more heavily focused on the business courses and that there should be less liberal art units to take. Students who are fully set and committed to become biz majors (like I was) should have a choice to take more classes related to business and not liberal arts. There were so many more awesome business courses that I would have much rather have taken that would most likely have been useful towards my career than, say something like religion or ethics or philosophy. Ethics and philosophy, by the way, could have easily have been one class making room for another business class. My opinion though, I really enjoyed my time at USF. I am still in touch with the professors, and during my time there it felt awesome to be able to participate so much and add to classroom discussions. I'm more than positive I wouldn't have been able to do that at a lot of other universities. I hope USF accepts me into the MBA program if/when I decide to apply.	
I feel one of the most important things to come out of my degree was a comfortably with standard terminology used in the tech sector - although much of this was gained through subsidiary reading well beyond my coursework. What I want to say is: If you can't speak the language, you can't do the job. Perhaps an ancillary focus should be on understanding the language of the focus courses (such as in talking about networking or databases) - for insurance, not really understanding what a mirror is our what it represents in a larger gestalt of a system design will hinder the graduate when talking about how to approach a design or plan system related activities.	
The USF business program has changed since my time there, as has the way much of the business world works. There are new utilities that change the way e-commerce works and the way employees are managed. A pragmatic, hands-on approach must be included for future students so they will be prepared to work. The class that helped me the most to prepare for work was Kathy Odsather's "Professional Development" class. I cannot recommend it enough. The way entrepreneurs create and manage businesses is also rapidly changing and the courses relevant to entrepreneurship must be reconsidered every other year.	
Modern events in the Wall Street Journal should be a constant source of debate/discussion in class.	
Please have more alum events in Manhattan! Please give students a priority to the USF Master programs.	
I thoroughly enjoyed my time at USF. The most important influence during my time as a student were my professors. I had some amazing professors and some mediocre professors. The ones who truly cared about each individual student, had prior, relevant work experience, and were excited to teach were the ones I still keep in touch with. They shaped my education -- not the program itself. The business department is fine but I think the real power lies within the faculty.	
The career center at USF is not that highly commendable in helping USF students find them a job or support the alumni's. Yet the USF never stop calling us or sending a letter for donation. I think if USF wants to succeed in soliciting us with donations, well maybe help or follow up with alumni's who have hard time getting a job.	
Statistic	Value
Total Responses	20

### USF School of Management -- BSBA Comparisons

Comparative	Competitive	Aspirational	Additional
Duquesne (108, unr)	CSU-East Bay	<b>Boston C. (4, 21)</b>	Michigan (12, 4)
<b>LMU (82, 93)</b>	SF State	<b>Fordham (40, 79)</b>	NYU-Stern (14, 5)
<b>Loy.-Md. (47, unr)</b>	<b>S. Clara* (43, 62)</b>	<b>Loy.-Chic. (117, 79)</b>	Pepperdine (unr, 51)
<b>St. Joe's (89, 113))</b>	Berkeley (15, 3)	<b>St. Louis (98, 79)</b>	USC (31, 11)
<b>Seattle* (61, 93)</b>			
San Diego (41, unr)			

\* Quarter System

() Bloomberg Business Week 2014 Ranking; U.S. News 2015 Ranking

#### Jesuit University

unr = unranked

Bloomberg	U.S. News
Notre Dame (1)	Penn (1)
Virginia (2)	MIT (2)
Cornell (3)	UC Berkeley (3)
<b>Boston College (4)</b>	Michigan (4)
Washington U. (5)	NYU (5)
.....	.....
<b>Georgetown (18)</b>	15
<b>Fairfield (58)</b>	unranked
Chapman (60)	unranked
Cal Poly-SLO (70)	unranked
<b>John Carroll (77)</b>	unranked
<b>Marquette (80)</b>	93
U. of the Pacific (102)	unranked
<b>Xavier (112)</b>	unranked
UC Riverside (132)	79
UC San Diego (unr)	62
San Diego St. (unr)	93
USF (unr)	113

	Duquesne	LMU	Loyola-Maryland	St. Joseph's	Seattle	U. of San Diego		USF
Units/Course	3	3	3	3	5	3		4
Total Units: Degree	122	120	120	120 (?)	180	124		128
<b>University Core</b>	<b>30</b>	<b>48</b>	<b>51</b>	<b>45 (minimum)</b>	<b>60</b>	<b>51</b>		<b>46</b>
Economics			2	3 (Integrative)				2
English/ Literature/ Communication	2	1	3	2	2	3		3
Ethics	1	1	1		1			1
Foreign Language (Proficiency)			Intermediate Level			Intermediate Level		
History		1	1	1		1		1
Humanities/Fine Arts		1 (Creative Experience)	1		1 plus (Humanities & Global Challenges)	1		1
Mathematics	1 (Prob. Solving w. Creative Math)	2	2 (Calculus)		1 (Calculus)	1 (College Algebra or higher)		1 (Statistics)
Natural Science	1	1	1		1 plus (Natural Sciences & Global Challenges)	2 (Physical & Life)		1
Philosophy/Logic	1	1	2	1	1	3		1
Social Sciences		1 (Human Behavior)	2	2	1	2		x
Theology, Religion	1	1 plus Faith & Reason	2	1 plus Faith & Reason	1 plus (Religion in Global Context)	3		1
Theme (Creative Arts, Faith & Reason, Global Diversity, Social Justice)	3 of 4							
First Year Seminar		1		1				
Diversity		1 (American Diversity)	x	x (or Globalization, or Non-Western Studies)		1		x
Interdisciplinary Connections		1		1 (Intro to Health Care & Public Health)				

Notes	One course must be designated as Information Literacy; one as Service Learning; and 4 as Writing Intensive.	One course in Interdisciplinary Connections. 6 flags: 2 Writing, 1 Oral, 1 Info Literacy, 1 Quant Reasoning, 1 Engaged Learning		One course: Intro to Health Care & Public Health. One course must be designated as writing intensive; one as ethics intensive. Course Structure: Signature (6), Variable (10), Integrative (3), Overlay (no credit value) (3)		Course Structure: Indispensable Competencies (4), Traditions (5), Horizons (8)		
	Duquesne	LMU	Loyola-Maryland	St. Joseph's	Seattle	U. of San Diego		USF
Business Core	50	43	33	30	82	46		36
Excel/Software/Computer Competency	1			x	x			
Math Requirement						x		
Gateway to Business/ Labs/ Introduction to Business	x	4 one-unit courses: Bus. Institutions, Eth. Dec. Models, Info. Technology, Bus. Globalization			x			x
Accounting	2	2	2	2	2	2		2
Analytics/Decision Science				1	1	1 plus (Calculus)		1
Bus. Policy/Strategic Mgt.	1 (Strategic Mgt.)	1 (Strategic Mgt.)	1 (Bus. Policy)	1 (Bus. Policy)	1	1 (Strategic Mgt.)		1
Business & Society						1		
Communication					1			
Economics	2	2			2	2		
Ethics	includes Communication							
Finance	1	1	1	1	1	1		1
Global Economics	1	includes Social Responsibility			1			
Information Systems	1	2 courses (only one for accounting majors)	1	1	1	1		1
International Business		1	1					

Law	1	1	1 (Legal Environ.)	1 (Legal Environ.)	1	1		1
Management/Org. Behavior	1	1	1	1	1	1		1
Marketing	1	1	1	1	1	1		1
Statistics	2		1	1	1	1		
Supply Chain/Operations	1		1		1	1		
Notes:	Business core completed by start of junior year.							
	Duquesne	LMU	Loyola-Maryland	St. Joseph's	Seattle	U. of San Diego		USF
Degrees (Major)	BSBA	BS-Accounting, BBA, BS-AIMS	BBA-Accounting, BSBA	BSBA	BA-Economics, BABA	BBA		BSBA
Accounting	x	x	x	x	x	x		x
Advertising & PR								
Business Intelligence & Analytics				x				
Economics	x		x		BA-Economics	plus Business Economics		
Entrepreneurship	x	x		and Family Business				x
Finance	x	x	x	x	x	x		x
Financial Planning				x				
General Business			x	Business Admin.	Individualized	Business Admin.		x
Healthcare				Pharmaceutical & Healthcare Marketing				
Hospitality Management				Food Marketing				x
Human Resource Management								
Information Systems	x	x	x					
International Business	x		x	x	x	x		x
International Economic Devel.					BA-Economics			
Leadership				and Ethics & Org'l Sustainability				x
Legal Studies/Business & Law	x				x			
Management	x	x	x	Managing Human Capital	x			

Marketing		x	x	x	x	x	x		x
Real Estate							x		
Risk Management & Insurance					x				
Sports Management		x			x				
Supply Chain/Operations		x							
Notes:			AIMS: Applied Information Mgt. Systems						
		CSU-East Bay	SF State	Santa Clara	UC Berkeley	Boston College	Fordham	Loyola-Chicago	St. Louis
Units/Course		4 to 5	3	4 to 5	3	3	3	3	3
Total Units: Degree		180	120	175	120	120	124	120	120
<b>University Core</b>		<b>?</b>	<b>48</b>	<b>?</b>	<b>63</b>	<b>45</b>	<b>39</b>	<b>52</b>	<b>48</b>
Economics				3	2		2		
English/ Literature/ Communication			2	3	3	2	2	4	4
Ethics				1				1	1
Foreign Language (Proficiency)				x	x	x			
History					1	2	1	2	1
Humanities/Fine Arts			3	1		1	1	1	
Mathematics			1 (Quant. Reasoning)	2 (Calculus)	2 (Calculus)	1 (Calculus)	2	1	2
Natural Science			3	1	2	2		2	1
Philosophy/Logic			1			2	2	2	1
Political Science									
Social Sciences			3	2	1	2 (Economics)			1 (Psychology)
Statistics					1		1		
Theology, Religion				3		2	2	2	2
Theme (Creative Arts, Faith & Reason, Global Diversity, Social Justice)									
First Year Seminar									
Diversity			x	1		1			
Interdisciplinary Connections									

Notes	Taken along with depth of study.	3 course cluster in Cultural, Ethnic and Social Diversity.	One course must be designated as service learning. Additional courses in: Civic Engagement; Culture & Ideas (3); Science, Tech & Society; Pathways (16 units)	1 course in each: Int'l Studies, American History, American Institutions, American Cultures; plus 4 upper-division non-business units.			2 courses in Societal & Cultural Understanding	Plus 2 courses from (African American Studies, History, Political Science, Sociology, or Women's Studies) and 1 additional course in math or science.
	CSU-East Bay	SF State	Santa Clara	UC Berkeley	Boston College	Fordham	Loyola-Chicago	St. Louis
<b>Business Core</b>	<b>51</b>	<b>39</b>	<b>?</b>	<b>43-51</b>	<b>36</b>	<b>48</b>	<b>39</b>	<b>44</b>
Excel/Software/Computer Competency	x				1			
Math Requirement								
Gateway to Business/ Labs/ Introduction to Business			1	3	1	Ground Floor		Intro (1 unit) plus Capstone (1 unit)
Accounting	2	2	2	2	2	2	2	2
Analytics/Decision Science	2			1	1			1
Bus. Policy/Strategic Mgt.	1 (Strategic Mgt.)	1 (Both)	1		1	2	1	1
Business & Society	1	1		1 (Social, Political & Environment of Business)				
Communication		1	1 (Bus. Writing)	1		2		
Economics	3	1		3			3	3
Ethics								
Finance	1	1	1	1	1	1	1	1
Global Economics	1 (Analysis)							
Information Systems	1	1	1			2	1	1
International Business		1	1					1
Law	1 (Legal Env.)		1		1	1	1 (Legal & Reg.)	1 (Legal Environ.)
Management/Org. Behavior	1	1	1	1	1	2	1	1
Marketing	1	1	1	1	1	1	1	1
Statistics	1	1	2		1	1	1	1

Supply Chain/Operations		1	1	1		1	1	1	
Notes:				One lower-division course is Philanthropy: A Cross-Cultural Perspective.		Has an integrated liberal studies and business core (with (projects): Innovation (start-up), Teamwork (consulting), Analysis (merger), Leadership (comp. simulation), Exploration (career).			
		CSU-East Bay	SF State	Santa Clara	UC Berkeley	Boston College	Fordham	Loyola-Chicago	St. Louis
Degrees (Majors)		BSBA	BSBA	BS in Commerce	BSBA	BS	BS	BBA	BSBA
Accounting		x	x	x		plus Corporate Reporting & Analysis	x	x	x
Advertising & PR		x					Community & Media Mgt.		
Business Intelligence & Analytics			plus Decision Sciences						
Economics		Business Economics		plus Mathematical Economics		x	Business Economics	x	x
Entrepreneurship		x	and Small Business				x	x	x
Finance		x	x	x		x	x	x	x
Financial Planning									
General Business			x			x			
Healthcare									
Hospitality Management									
Human Resource Management		x						x	
Information Systems		x	x	x		plus Accounting, Computer Science	x	x	x
International Business			x					x	x
International Economic Devel.									
Leadership									and Change Mgt.
Legal Studies/Business & Law							x		



Management		Corporate	x	x		and Leadership	x	x	
Marketing		x	x	x		x	x	x	x
Real Estate		x							
Risk Management & Insurance									
Sports Management							x	x	x
Supply Chain/Operations		Both		x		Operations		x	
Other							Sustainable Business		
Notes:				Some majors have emphases.		Does not have majors or concentrations.			
		Michigan	Stern	Pepperdine	USC				
Units/Course		1.5-3	4	3 to 4	4				
Total Units: Degree		120	128	128	128				
University Core		54	24	74	48				
Economics		1		1 (Macro)	2				
English/ Literature/ Communication		First Year Writing	1 (Writing) plus 1 (Texts & Ideas)	3	2				
Ethics									
Foreign Language (Proficiency)				3					
History			1 (Cultures & Contexts)	1					
Humanities/Fine Arts				3					
Mathematics		1 (Calculus)	1 (Calculus)	2 (Calculus; Prob. & Linear Systems)	1				
Natural Science			1	1					
Philosophy/Logic									
Social Sciences				1					
Theology, Religion				3					
Theme (Creative Arts, Faith & Reason, Global Diversity, Social Justice)									
First Year Seminar				1					

Diversity		1 (Int'l Studies)	1	1
Interdisciplinary Connections				
Notes	Plus three of four: foreign language proficiency, humanities (9 credits), natural sciences and/or mathematical symbolic analysis (9 credits), social sciences (9 credits, not including Econ 101 & 102).	Program design: Liberal Arts (20 units), Global Studies (8 units), Social Impact (14 units).	Plus: 1 Political Sci.; 1 Non-Western Heritage.	Plus: 1 Social Issues; 5 General Education. Students also take 32 units in free electives.
	Michigan	Stern	Pepperdine	USC
Business Core	58	36+	43-44	40
Excel/Software/Computer Competency			1	
Math Requirement				
Gateway to Business/Labs/Introduction to Business		Business & Its Publics; Cohort Leadership		
Accounting	2	1 (Financial)	2	2 (6 units; 4 & 2)
Analytics/Decision Science	1 (4 units)		1	1 (2 units)
Bus. Policy/Strategic Mgt.	2		1	1
Business & Society	1 (Business & Leaders)			
Communication	2 (1.5 units each)	1 (Org. Comm. & Social Contexts)		1
Economics	1 (Applied)	1 (Micro) plus 1 (Econ of Global Bus.)	2 (Micro & Managerial)	
Ethics				
Finance	1		1	1
Global Economics				
Information Systems	1 (1.5 units)			
International Business				

Law		1 (& Ethics)		1 (Legal Env.)	
Management/Org. Behavior		1		1	1
Marketing		1		1	1
Statistics			1	1	1
Supply Chain/Operations		1		1	1
Notes:		Capstone: Choose one course from Integrated (Fin I Statement Analysis or Business Systems Consulting), Professional (Entre. Mgt. or Applied Quant/Value Portfolio Mgt.), or Research-Based (Senior Seminar or Business & the Public Policy Process).	Four of the following: IS, Mgt. & Organizations; Marketing; Finance; Managerial Accounting; Operations Management.	Plus: 1 Elective; 1 Service Leadership	
		<b>Michigan</b>	<b>Stern</b>	<b>Pepperdine</b>	<b>USC</b>
<b>Degrees (Major)</b>		BBA	?	BSBA	BSBA
Accounting			x	x	x
Advertising & PR					
Business Administration				x	x
Business Intelligence & Analytics					
Economics			x		
Entrepreneurship					
Finance			x		
Financial Planning					
General Business					x (Cinematic Arts)
Healthcare					
Hospitality Management					

Human Resource Management				
Information Systems		x		
International Business			x	x (World Program) or (Int'l Relations)
International Economic Devel.				
Leadership				
Legal Studies/Business & Law				
Management		x		
Marketing		x		
Real Estate				
Risk Management & Insurance				
Sports Management				
Supply Chain/Operations		x		
Notes:	There are no recognized majors; every student receives the valuable "BBA"	Actuarial Science; Statistics	B.A. requires 3 elective courses	B.A. requires 3 elective courses

### **Columbia Business School's New Image Campaign** [by John A. Byrne]

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**Knowledge:** An unrivaled culture of academic excellence.

**Access:** Unmatched exposure to the pulse of business, both inside and outside the classroom.

**Community:** A diverse, engaged and entrepreneurial community.

**Impact:** An immediate and lasting impact on the business world.

### **Berkeley-Haas MBA Core Curriculum**

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Berkeley Innovative Leader Development [BILD]. With respect to the BILD approach, each core course has been reviewed to determine elements that contribute to the fundamental capabilities linked by research to innovative leadership.

**Question the status quo:** being able to envision a different reality, to take intelligent risks, and to learn from failure, as well as having the courage to speak our minds.

**Confidence without attitude:** being able to make decisions based on facts and analysis, giving us the confidence to act without arrogance, leading through trust and collaboration.

**Students always:** having a mindset of curiosity and lifelong learning, seeking personal growth, and practicing behavior that tells others we can learn from them.

**Beyond yourself:** considering the long-term impact of our actions and the facility for putting larger interests above our own.

### **NYU Stern School of Business**

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**Business Core** [30 credits]. Financial Accounting; Microeconomics; Statistics; and four of six courses from Managerial Accounting, Finance, Information Technology, Marketing, Management, Operations Management.

**Business Concentration** [12 credits].

**Social Impact Core** [14 credits]. Business & Its Publics; Organizational Communication; Law, Business & Society; Professional Responsibility & Leadership.

**Global Studies Core** [8 credits]. Economics of Global Business; International Studies Program.

**Liberal Arts Core** [20 credits]. Courses in Calculus, Writing, Foundations of Contemporary Culture, Natural Science.

**Elective Courses** [44 credits].

### **Jesuit Leadership Tradition**

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**Self-Awareness:** Leaders thrive by understanding who they are and what they value, by becoming aware of unhealthy blind spots or weaknesses that can derail them, and by cultivating the habit of continuous self-reflection and learning.

**Ingenuity:** Leaders make themselves and others comfortable in a changing world. They eagerly explore new ideas, approaches, and cultures rather than shrink defensively from what lurks around life's next corner. Anchored by nonnegotiable principles and values, they cultivate the "indifference" that allows them to adapt confidently.

**Love:** Leaders face the world with a confident, healthy sense of themselves as endowed with talent, dignity, and the potential to lead. They find exactly these same attributes in others and passionately commit to honoring and unlocking the potential they find in themselves and in others. They create environments bound and energized by loyalty, affection, and mutual support.

**Heroism:** Leaders imagine an inspiring future and strive to shape it rather than passively watching the future happen around them. Heroes extract gold from the opportunities at hand rather than waiting for golden opportunities to be handed to them.

# Fordham: Gabelli InC

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InC stands for Integrated Core, a rigorous curriculum that provides a strong grounding in business fundamentals. It is comprised of five building blocks:

**Innovation.** The purpose is to understand existing business models and to start devising new ones right away. Embrace that spirit of innovation. Taken in freshman year.

Ground Floor. NYC executives visit your classroom to show you how accounting, finance, marketing, and more come together to drive a business.

Core Liberal Arts. Students become uncommonly well-grounded via the comprehensive liberal arts core curriculum.

Integrated Project. With a team of your Ground Floor classmates you will plan a brand-new startup company and, in the process, see how each business discipline comes into play.

**Teamwork.** The purpose is to ensure success through one's readiness to work well with others. Taken in fall of sophomore year.

Coursework. Your cohort (small group of students) will take all courses together, including Marketing, Strategy 1, Financial Accounting, Management 1, Business Communication 1, Information Systems 1, and Statistical Decision Making.

Integrated Project. Four to five classmates form a team of business consultants and find a real company, identify a problem it's facing, come up with a solution and pitch it.

**Analysis.** Because business is driven by data, students learn to take data and turn it into performance. Taken in junior year.

Coursework. Business core courses in Operations and Business Law core business along with liberal arts courses and courses toward one's major and/or concentrations.

Integrated Project. Students immerse themselves in modeling regarding whether two companies should be merged into one.

**Leadership.** Students learn leadership skills during their entire Fordham career; this block ties them all together. Taken in senior year. Students can choose to study abroad at the London Program.

Coursework. Business Ethics core course along with liberal arts courses and courses toward one's major and/or concentrations.

Integrated Project. Practice making wise, well-informed business decisions in a computer simulation.

**Exploration.** Students focus on answering the question: What will I do after I graduate? Students explore careers, decide what interests them and plan a post-graduation strategy. Taken in spring of sophomore year. Students can choose to study abroad at the London Program.

Coursework. Students take Finance, Strategy 2, Managerial Accounting, Management 2, Business Communication 2, and Information Systems 2 in a cohort.

Integrated Project. Explore a career idea by choosing a field of interest and then conducting in-the-field research, finding out what skills are needed. Discover how you stand out in interviews.

# Aptitudes/Capitals

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Data  
Financial  
Human  
Social  
Processes/Supply Chains

Technology  
Product/Service  
Legal/Regulatory  
Sectors

## University of Michigan

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The three-year Ross BBA requires 120 credits. You will need at least 58 business credits and at least 54 liberal arts credits, and you'll meet specific requirements in humanities, natural sciences, social sciences, or language. Liberal arts credits are earned at other schools across the University of Michigan.

You take most Ross core courses in a prescribed order, complete floating core courses in any order between sophomore winter and senior fall, and conclude with a capstone experience in your senior winter term. You can add business electives beginning in your sophomore year.

At Ross, there are no recognized majors. This means every student receives the valuable BBA and has the opportunity to pursue a variety of academic interests.

Freshman Year: Explore & Connect – Connect with the University of Michigan and explore subjects like languages, sciences, or liberal arts.

Sophomore Year: Business & Leaders and the Positive Difference. Explore what role you can play in business, and what role business can play in society, in this unique introductory course. It will help you determine where and how you want to contribute to the Ross community, build on your passions, and develop personal plans to guide your BBA experience toward your career goals. The course introduces some action-based learning approaches like live case studies, simulations, and guest speakers in addition to lectures, discussions, and online exercises.

Junior Year: Integrative Semester. Explore the connections between business disciplines by studying one set of cases from multiple points of view. Expand your horizons. Go beyond your cultural comfort zone. Study and learn abroad to see how business and cultural norms differ around the country and the world.

Senior Year: Capstone Courses. These integrate your academic experience, focus on the first years in your chosen career, or are rooted in research.



## DESIGN THINKING DEEP-DIVE

UNDERGRADUATE PROGRAM CURRICULUM INNOVATIONS PHASE 2

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# WELCOME TO PHASE 2 OF THE BSBA DEEP DIVE

## RECAP: OVERVIEW

The School of Management is embarking on phase 2 of its re-examination of fundamental competencies that BSBA students will need in the future, in order to recast specific classes that are offered. The project goal remains to significantly enhance and differentiate the USF McLaren Undergraduate BSBA Program.

Phase 1 of the project was a first step in generating opportunities and ideas. With input from members of the faculty, staff student and alumni community we explored student and SOM needs, leading to a strategic framework that offers a new and differentiating student experience.

In Phase 2 of the project we will develop the strategic framework and program content details to a unified final curriculum concept for implementation in academic year 2016. We look forward to your contribution as we move forward.

## PROJECT PROCESS

The project continues to employ user-centered Design Thinking innovation methods to create differentiation for the future BSBA program. This is a Deep Dive to generate ideas in an accelerated timeframe.

Ideas have been inspired by students, faculty and alumni, representing program 'users', who have participated in phase 1 of the project and are invited to contribute to Phase 2 development of the curriculum ideas.

Building on these user insights, three preliminary strategic concepts were identified in Phase 1 offering alternative ways the future student experience might be framed. After consultation and discussion a preferred strategy framework was selected for curriculum development.

## CHALLENGES + ASSUMPTIONS

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The project is generating answers to three challenges:

### Phase1

- To identify and describe key competencies, experiences, and insights that graduating students need to succeed in their lives and their professional careers.
- To describe ideal learning experience(s) for individual students.

### Phase 2

- To respond to the need for effective, viable and feasible program elements to drive implementation.

# PROJECT OUTPUTS

## PHASE 1 OUTPUT

Output from the first phase of the project has been:

- Lecture / workshops and Interview Sessions

A series of collaborative events with the extended project team of stakeholders (faculty, adjunct faculty, staff, students, alumni) to enhance understanding of Design Thinking process, discuss future student needs, and explore program innovation opportunities

- Final phase 1 presentation:

- 1) Insights into future student (and organization) needs.
- 2) 3 potential strategic frameworks for the future BSBA program.
- 3) Examples of future student experiences within the alternative frameworks
- 4) Proposed plan for Phase 2 to further develop the BSBA program innovations

## PHASE 2 OUTPUT

Phase 2 of the project will deliver:

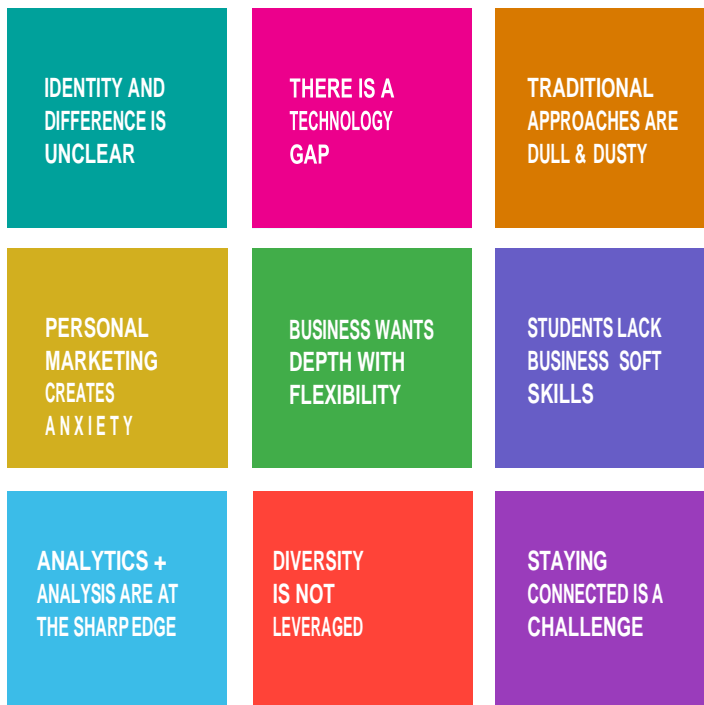
- Regular update documents shared through the phase, and final presentation of:

- 1) The 2016 curriculum strategy vision and justification (user insights, consultation evidence, e t c .)
- 2) Details of proposed curriculum elements, student experiences, and intended outcomes
- 3) Outline of design principles to guide program implementation and further development
- 4) Proposed implementation plan.
- 5) Document suitable for approval of the new program curriculum (to be defined)

- Alignment amongst representative stakeholders on a more detailed proposal for the new curriculum, to enable the new BSBA curriculum plan to be at 'approval-ready' status for the Fall UPC meeting.

# GUIDED BY USER INSIGHTS

Phase 2 of the project will build on user insights into the current BSBA program gained in the previous phase of the project, and presented in the document called: USF\_UG\_DesignThinkingDeepDive\_UPC\_April 2015\_rev9.0.pdf



# OUR STRATEGIC FRAMEWORK

## A Learning Hub in the Bay Area Business Ecosystem

<p>IDENTITY AND DIFFERENCE IS UNCLEAR</p> <p>A BUSINESS HUB</p>	<p>THERE IS A TECHNOLOGY GAP</p> <p>CS PARTNERSHIP</p>	<p>TRADITIONAL APPROACHES ARE DULL &amp; DUSTY</p> <p>PROJECT-BASED</p>
<p>PERSONAL MARKETING CREATES ANXIETY</p> <p>ECO-NAVIGATOR</p>	<p>BUSINESS WANTS DEPTH WITH FLEXIBILITY</p> <p>MULTI-ROLES</p>	<p>STUDENTS LACK BUSINESS SOFT SKILLS</p> <p>SOM-STARTER</p>
<p>ANALYTICS + ANALYSIS ARE AT THE SHARP EDGE</p> <p>RESEARCH RESEARCH</p>	<p>DIVERSE CULTURE IS NOT LEVERAGED</p> <p>KNOWLEDGE SHARING</p>	<p>STAYING CONNECTED IS A CHALLENGE</p> <p>KS/COMINTERNET</p>

This over-arching strategic framework was selected in discussions with stakeholders, and presentation at the UPC meeting in May.

### KEY IDEA

To meet future program challenges, the BSBA program will be an active learning hub in the Bay Area business ecosystem. Entering the program will mean entering the business world.

### VALUE PROPOSITION

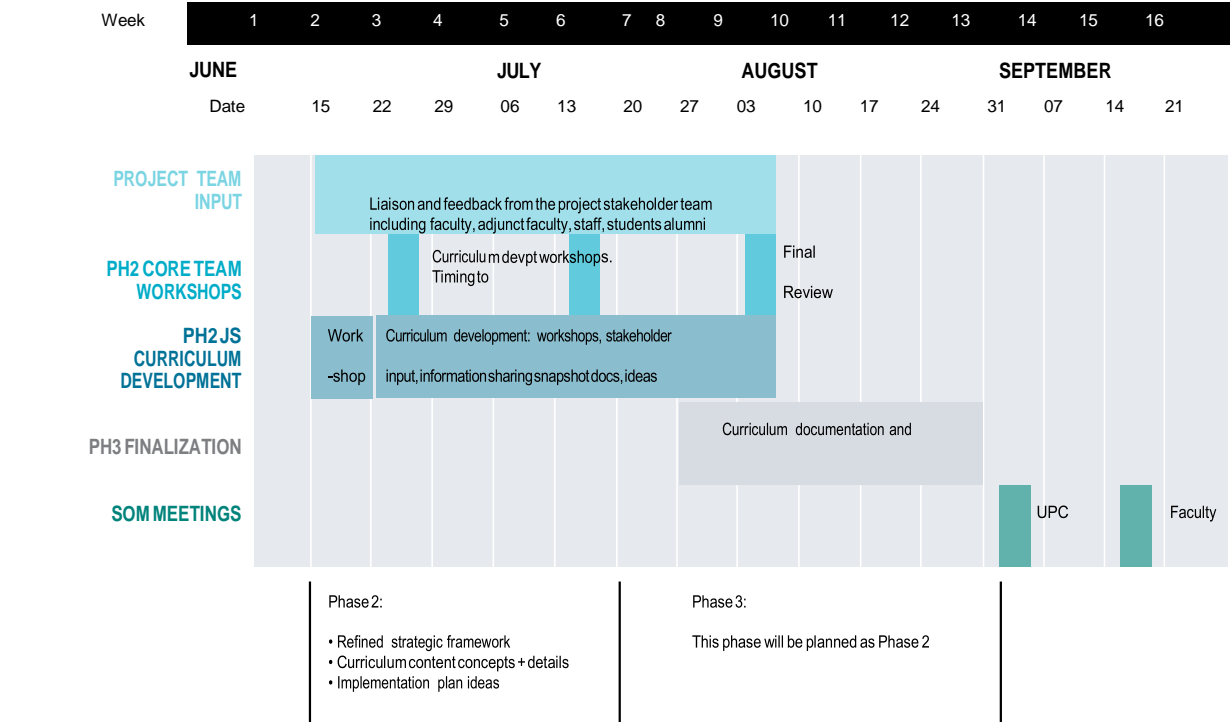
Increased entrepreneurial, corporate and non-profit connections immerse students in educational networks from day one of the program, creating a highly energized, focused and differentiated BSBA program.

### POTENTIAL FEATURES OF THE FUTURE STUDENT EXPERIENCE

Phase 2 of the project will explore and define the new program features. These may include:

- Greater integration of Career Service Center into BSBA learning activities
- Major expansion of contact points with business
- Student-faculty knowledge sharing to develop BSBA Points of View (POV's)
- Merging of current student and alumni into one learning-business network
- Cultivation of new media networking and publishing contacts
- Expanded 'Key Opinion Leader' network

This diagram shows an overview of the proposed Phase 2 activities flow, and key outputs.



# PHASE 2 DEVELOPMENT WORKSHOP

Participants will be invited from faculty, adjunct faculty, staff, students, and are planned for 2 hours. Below is a preliminary agenda:

## **Workshop**

### **Introduction (10 minutes)**

Program

Directors

introduction to

workshop JS recaps

phase 2 goals

JS introduces workshop goals and confirms agenda with participants

### **Strategic Framework Summary & Discussion (20 minutes)**

JS summarizes the selected

strategic framework Group

discussion of framework

### **Brainstorms (60 minutes)**

JS introduces brainstorming rules and 'How Might We' (HMW) brainstorm topics

Collaborative break-out team brainstorms:

Breakout teams each brainstorm 2 topics for 20 - 25 minutes with a

break between. Brainstorming will aim to generate a lot of ideas for

each topic.

Example topics might be, for instance:

- HMW create strong bonds between students from diverse international backgrounds?
- HMW generate more ways to network with opinion leaders in the Bay Area business network?
- HMW create attractive personalized options at points in the program?
- HMW we make the college environment feel more like a business environment?

### **Share Back & Discussion (30 minutes)**

Full group discussion and selection of best ideas.

### **Post-Workshop**

JS will document and cluster brainstorm and discussion output for review and prioritization.

October 8, 2015 (from Mark Cannice, co-chair UPC)

**UG Redesign Initiative: Process - Findings – Proposal for planned action (closing the loop).**

**Background**

In an on-going effort to ensure an innovative and impactful undergraduate BSBA curriculum that serves more than 2000 USF students the USF SOM Undergraduate Programs Committee (UPC) undertook a fundamental redesign process beginning in the Fall of 2014. To ensure an optimal process, the committee employed a 'Design-thinking' Innovation Methodology supported by a highly experienced design consultant (18 years with the global design firm, IDEO). In brief, the design thinking process examines the human need, in this case the student need, and attempts to identify appropriate technologies and models to best serve the student need, in this case, a world-class learning experience that best prepares students to have successful professional and personal lives.

In this innovation process, a series of about 6 design-thinking workshops were performed, facilitated by the contracted innovation design consultant that included the participation of a total of about 75 full and part-time faculty, staff, students, alumni, and local executives. Again, the main purpose of these workshops was to identify the key student needs and any gaps that existed in what our BSBA program was delivering and what students needed. This process identified a number of needs and also led to the development of a distinct framework that would be distinctive and leverage USF SOM's key capabilities.

**The main takeaways of the BSBA program re-design process so far include:**

a. Proposed Framework for the BSBA program: "When students enter McLaren, they enter an engaging learning and knowledge creation node the San Francisco/Silicon Valley business ecosystem." In this conceptualization – students are expected to engage with and contribute to the value creation system of the unique SF/SV ecosystem. This is a different conceptualization of the typical university business program (e.g. student goes to college for 4 years, hopes to find an internship, and then looks for a job). This framework, developed through the innovation design-thinking process, allows for a broader view of the competencies and experiences students can tackle while they are here. It also calls for a level of business professionalism and responsibility of students for their own learning and career development. We think this is a big idea that can have a profound impact on the learning experience of students at USF SOM. Additionally, an added benefit of this framework, is an increase of engagement of faculty and staff in the business ecosystem as mentors of students engaged in professional learning activities. This increased engagement of faculty and staff should have the added benefit of linking the scholarly competencies of our SOM educators to the professional knowledge of business professionals, thus, providing a clearer link between theory and practice for many more of our students, whether they are in the classroom or in the business community. Of course, the key need is to operationalize specific outcomes from this framework.

b. A significant gap was identified in our curriculum. In brief, we need more technology preparation for our students so they can 'do things' as well as 'know things', so they can more readily contribute in a meaningful way to large or small organizations and, thus, have a better shot of getting that first key professional job. Perhaps this means an additional tech class in the core and/or perhaps departments can find room for some tech applications in their core and elective classes that tie into industry needs. At the very least we need to better understand the current tech skills students are getting in current core requirements math 106 (business statistics), bus 204 (quantitative business analysis), and bus 308 (systems in organizations) so that we can better incorporate some of these skills in other core classes and electives. Ideally, each department can also communicate needed technology skills to BAIS department to help them optimize those current classes and possibly develop a new class.

c. Need more professional learning experiences to tie into our ecosystem and again enhance students' ability to get in the door of their first professional job. Perhaps this comes in a professional development class - or perhaps this might be developed by each department where it makes sense. We should also recognize that we already provide some professional learning in our management core class (bus 304) - a service learning component and the 401/406 capstone projects that are presented to professional panels of executives and investors.

d. Perhaps some element of customization of students' studies so they can again better prepare for their ideal career. This might imply some element of choice within functional areas. [e.g. in university core - students select from a menu of philosophy classes to complete their philosophy requirement, and for our BSBA capstone - students choose between 401



(strategic mgmt.) and 406 (ent management)]. One department I spoke with may consider experimenting with this (e.g. all core sections cover principal content in first half of the core class, but second half of class may have room for specialization (e.g. international, analytical, function-specific, etc.) This also creates a competitive market for the most demanded content so that we continually renew and innovate to students' needs.

As a practical matter - point 'b' - more tech preparation is the key and urgent need and one item we hope to address in a timely manner.

#### **Proposed action in initial implementation of findings**

- a. Add a technology class to core that provides students with key enterprise tech and SME tech skills.
- b. To make room for tech class - we hope to combine 2 required econ classes (macro and micro) into one.
- c. We hope to move the management core class earlier (sophomore year) so students see more of a qualitative aspect of management earlier (right now all their classes are quant the first 2 years).

These 3 items require some further discussion with relevant faculty, admin, etc., but we think it is doable.

Other items - e.g. recommending that departments include a tech application class in their major, and an experiential aspect to their major are recommendations we will make and hope to get some adaptation of over time.

Co-curricular items - are less critical path - but we think we can implement some (off site orientation for in-coming students at major local businesses to emphasize the fact that they are part of the local business ecosystem, other on-going professional development activities that link to the local ecosystem, etc.)

#### **Time line for Implementation of Initial Redesign Recommendations**

On-going discussions with department chairs for input (march 2015 – September 2015)  
Present 3 item implementation proposal to DCs – Oct 7, 2012  
Present above items to UPC on Monday, October 12, 2015.  
Gain approval from Econ Dept. – week of Oct 12  
Confirm with Management Dept. – week of Oct 12  
Refine BAIS additional course – week of Oct 12  
Faculty Brownbag – week of Oct 19 and Oct 26  
UPC vote – November 13  
Faculty vote – November 25  
Dean approval – December – 1  
Update Fall 2016 course requirements with UG office, office of admissions, CASA – week of December 1

#### **Follow-up:**

While we attempt to complete administrative process to implement the afore-mentioned 3 key curriculum initiatives, the UPC will continue to refine co-curricular activities to also implement in Fall 2016 as well as continue developing related curriculum initiatives (greater choice and customization for students' classes along with additional professional education opportunities.)

## **APPENDIX 11**

### **A Selection of School of Management Prominent Alumni**

## School of Management: Select Living Alumni

**Salvador D. Aceves-** ('83) (EdD '95) is vice president, chief financial officer, and professor of accounting at Regis University in Denver.

**Daniel Alcalá-** ('04) Financial Advisor at BancWest Investment Services and former senior branch operations manager for AXA Advisors, LLC, a financial services firm in San Mateo. He also served as a principal for Scottrade Financial Services for a decade.

**Wolfran Alderson** ('08) co-founded the Institute for Responsible Nutrition, to educate consumers about the health risks of sugar and processed foods.

**Sabeen Ali** ('09) CEO of Angelhack and founder of Code for a Cause, a nonprofit organization. Ms. Ali was selected by AACSB in 2015 to be in its inaugural class of the world's 100 most influential leaders, among 127 universities in 25 countries.

**Micheal Appezato-** ('14) Co-Founder of Clearspace

**Luis Alvarado-** ('12) Investment Research Analyst, Wells Fargo Wealth Management, Highlighted in *Forbes Magazine*, "30 under 30."

**Tony Bartenetti-** ('85) COO/President of all field operations and sales for Nelson, the largest independent provider of staffing services and solutions in California.

**Michael Bohlsen, MBA-** ('95) Owner of Bohlsen Restaurant Group

**Gary D. Boyd-** ('79) CEO of Southern Mono Healthcare District, Mammoth Lakes.

**London Breed, MPA-** ('13) President, San Francisco Board of Supervisors

**Oral Lee Brown-** ('86) established the Oral Lee Brown Foundation, which has financed the college education of many Oakland youths. She received an honorary doctorate from USF for her community service work. Published *The Promise: How One Woman Made Good on Her Extraordinary Pact to Send a Classroom of 1st Graders to College*.

**Dan Callahan-** ('76) recently retired from his position as president and CEO of Foglight Software.

**Bill Cartwright-** ('79) Star player in the National Basketball Association. Wrote the forward to, *If These Walls Could Talk: Chicago Bulls: Stories from the Sideline, Locker Room, and Press Box of the Chicago Bulls Dynasty*

**Thiraphong Chansiri-** ('88) current president of Thai Frozen Food products.

**Claudio Chiuchiarelli-** ('79) Managing Partner of Banyan Securities Company LLC, and former Chairman of the USF Board of Trustees.

**Myung-Gun Choo-** ('69) current chairman of Sejong Investment & Development Co., and honorary chairman of Sejong University in Seoul, Korea. Wrote *The New Asia in Global Perspective*.

**Douglas Clark-** ('91) Métier, the company he founded was recently recognized as one of the best places to work in the North Bay by the *North Bay Business Journal* for the second year in a row. The company also received international recognition for its giving program, Protectors to Project Managers, which provides project management training and professional development coaching to wounded veterans.

**Jeanne Cunicelli-** ('98) Partner at Bay City Capital.

**Sheryl Davis, MPA-** ('11) San Francisco Human Rights Commissioner

**Richard J. Doscher-** ('91) ('93 MPA) was appointed planning commissioner for the county of Sutter, California.

**Barbara Garcia MPA-** ('01) Director of Public Health for San Francisco

**Claire McCaffery Griffin-** ('74) started her own consulting firm, CGC, LLC. She works with government agencies and nonprofits to support and promote civic education. She wrote *Being an American*.

**Ronald Holt-** ('02) awarded the 2009 David Lawrence Community Service Award. This national prize from Kaiser Permanente acknowledges individuals and groups who display exceptional effort to improve the health of the community.

**Oliver Johnson-** ('65) operations manager of the Shared Food Network, a division of Catholic charities in Washington, DC; director of human resources at Giant Food, Inc.

**Christina Rodriguez Laskowski-** ('90) serves as president of the Science and Technology Advisory Council – Silicon Valley, a nonprofit focused on promoting self-sufficiency and industry growth in the Philippines through entrepreneurship.

**Marina Ledin-** ('96 MBA) is a six-time Grammy nominated "Classical Record Producer of the Year". She also produced surround sound high-definition audio recording for the United States Military Academy at West Point.

**Valerie Lemke-** ('12) Co-Founder of Jjangle

**Dave Yeske Ma-** ('95) awarded the Heart of Financial Planning Award by the Financial Planning Association. The award recognizes professionals who contribute to the financial planning community and public. He also co-author many articles.

**Thomas Malloy-** ('61) founder of Tom Malloy Corporation; recent Chairman of the USF Board of Trustees.

**Putra Masagung-** ('74) received the University of San Francisco's President Medallion in 2005; executive chairman of Guthrie GTS.

**Angela McConnell-** ('95) received the Mountain View Chamber of Commerce's 2005 Athena Award for Outstanding Woman of the Year.

**Alexandra Morgan-** ('00) CEO of Family House, Inc.

**John Nicolai-** ('71) Managing Partner at Greer Anderson Capital and former Managing Partner, Ernst & Young LLP; Tax Managing Partner for Asia Pacific.

**Lynn Noren MS-** ('96) President and CEO of Rise Foundation, a nonprofit agency that assists people with disabilities to secure employment and become self-sufficient. Noren also chairs the Minnesota Habilitation Coalition's Governmental Affairs Committee and is also a member of the Minnesota Department of Human Services Expert Partner Panel and the Long-Term Care Provider Coalition. She also published *Tools of the Trade* in 1998.

**Paul Ocon-** ('93) a 2007 fellow of the American College of Healthcare Executives (ACHE), the nation's leading professional society for healthcare leaders.

**David Olivio-** ('71) Was re-elected city treasurer of South Lake Tahoe.

**John E. Popovich-** ('58) diplomat with the U.S. Foreign Service, retiring as assistant inspector general for resource management of the agency.

**Christena Reinhard-** ('08 MBA) launched Union & Fifth, an online fundraising platform that sells donated designer clothes to raise money for nonprofits.

**Jo Ellen Ross-** ('97) received the Distinguished Executive Leader Award from the Cannon Health Care Quality Improvement Endowment.

**Mike Sangiacomo-** ('71) CEO and President of Norcal Waste Systems, San Francisco's major recycling organization.

**Emmanuel Serriere-** ('81) received a certificate of recognition from California State Assemblyman Greg Aghazarian "in honor of his commitment to improving the community through kindness, and for the enduring value of his professional goals and pursuit of excellence." Serriere also wrote "*New Neighbors*". *Project O.P.E.N. The Minnesota Governor's Council on Developmental Disabilities Working to Increase Independence, Self-Determination, Productivity, Integration and Inclusion.*

**Robert Shireman-** ('86) former Deputy under Secretary of U.S. Department of Education.

**Michelle Jarrett Skaff-** ('76) Entrepreneur/ Leadership Development at LifeVantage and former President of the Sierra Foundation and Chairman of the Sierra Club Foundation; member of the USF Board of Trustees.

**Carl Strickland-** ('99) Co-Founder of the Point Foundation

**Bob St. Clair-** ('52) member of Pro Football Hall of Fame and star player on the famous 1951 USF "undefeated, untied, and uninvited" football team. Wrote the forward to *The Good, the Bad, & the Ugly: San Francisco 49ers: Heart-Pounding, Jaw-Dropping, and Gut-Wrenching Moments from San Francisco 49ers History.*

**Lena Tam-** ('96) named "Woman of the Year" by Assemblywoman Wilma Chan of the 16th Assembly District. Chairs the Alameda County Council of the League of Women Voters; served as President of the City of Alameda League of Women Voters and the East Bay Asian Voter Education Consortium.

**Dominic Tarantino-** ('54) former chairman of Price Waterhouse World Firm Limited and former chair of the USF Board of Trustees.

**Lorraine Taylor-** ('88) founder of 1000 Mothers to Prevent Violence, an organization that offer help to families affected by violence.

**Kurt Vette** – ('93) President, Wonderful Brands (formally POM Wonderful)

**Charles Wilson-** ('02) Judge, Santa Clara County Superior Court, appointed in 2014 by Governor Brown

**Kenneth G. Winans-** ('87) completed his third book in 2010, they include *Preferred Stocks: The Art of Profitable Income Investing*; *Preferreds*; and *Investment Atlas*. President of Winans International Investment & Research,

**Lynn Woolsey-** ('81) recently served her eighth and last term in the Sonoma-Marin district seat of the U.S. House of Representatives.

**Dennis Young-** ('65) recognized by the California Society of CPAs with its Public Service Award for 2008 for service to community organizations; founded the Los Altos Community Foundation and currently serves as its corporate secretary. Young also wrote *Financing Nonprofits: Putting Theory into Practice.*

**Jing Zhang-** ('13) Co-Founder of Clearspace

**APPENDIX 12**  
**China Business Studies Initiative**



UNIVERSITY OF  
SAN FRANCISCO | School of Management  
China Business Studies Initiative



中國銀行  
BANK OF CHINA



U.S. China Business Studies  
Initiative and Bank of China

Conference

**CRACKING THE U.S.  
MARKET: OPPORTUNITIES  
& THREATS FOR CHINESE  
MULTINATIONALS**

Host Inaugural International

旧金山大学中国企业管理  
研究所和中国银行举办  
首届国际投资峰会



攻克美国市场: 中国跨国公  
司的机遇与威胁



February 26-28, 2015  
University of San Francisco  
2015年2月26日至28日



# CRACKING THE U.S. MARKET:

## OPPORTUNITIES & THREATS FOR CHINESE MULTINATIONALS

USF China Business Studies Initiative Hosts  
Inaugural International Conference

**Cracking the U.S. Market: Opportunities and Threats  
for Chinese Multinationals**

旧金山大学中国企业管理研究所国际会议  
攻克美国市场:中国跨国公司的机遇与威胁

Co-Hosts 协办单位:

Bank of China 中国银行

ChinaSF, City of San Francisco 旧金山市驻华办公室

Bay Area Council 湾区委员会

East West Bank 华美银行

Sterling Bank & Trust 富华信托银行

February 26-28, 2015

University of San Francisco

Main Campus, Fromm Hall

2130 Fulton St., San Francisco, CA 94117



UNIVERSITY OF  
SAN FRANCISCO

School of Management  
China Business Studies Initiative

# Program Overview

## 会议议程一览

### Day One: Thursday, February 26

*Transamerica Pyramid Building, 600 Montgomery Street, 48th Floor, San Francisco*

- 3:30—4:00pm Registration
- 4:00—4:30pm Opening Ceremony
- 4:30—5:00pm Keynote Address
- 5:20—6:15pm Formal Reception Co-hosted by Sterling Bank
- 6:15—7:30pm Chinese New Year Celebration Co-hosted by Bay Area Council

*Julia Morgan Ballroom, Merchants Exchange*

*465 California Street, 16th Floor, San Francisco, CA 94104*

### Day Two: Friday, February 27

*USF Main Campus, Fromm Hall*

- 7:30—8:30am Breakfast
- 8:30—9:00am Welcome (*Xavier Auditorium*)
- 9:00—9:30am Keynote Address (*Xavier Auditorium*)
- 9:30—9:45am Tea Break (*Commons Court Atrium*)
- 9:45—11:00am Key Panel One (*Xavier Auditorium*)
- 11:00am—12:15pm Concurrent Sessions
- 12:45—1:45pm Luncheon and A Conversation with Education Leaders (*Maraschi Room*)
- 2:00—3:15pm Business-to-Business Networking Meeting (*Maraschi Room*)
- 2:00—3:15pm Concurrent Sessions
- 3:15—3:30pm Tea Break (*Commons Court Atrium*)
- 3:30—4:45pm Concurrent Sessions
- 4:45—6:00pm Key Panel Two (*Berman Room*)
- Key Panel Three (*Xavier Auditorium*)
- 6:00—6:30pm Campus Walk to Lone Mountain
- 6:30—8:30pm Gala Dinner and a Fireside Conversation with Business Executives (*Del Santo Reading Room*)



## Day Three: Saturday, February 28

*USF Main Campus, Fromm Hall*

7:30— 8:30am      Breakfast  
8:30—9:15am      Keynote Address (*Xavier Auditorium*)  
9:15—10:30am      Key Panel Four (*Xavier Auditorium*)  
10:30—10:45am      Tea Break (*Commons Court Atrium*)  
10:45am—12:15pm Theory Meets Practice: Roundtable Sessions  
Session A (*Maier Room*): Mitigating U.S. Litigation Risks for Chinese Companies  
Session B (*Maraschi Room*): Beyond Philanthropy  
Session C (*Berman Room*): How to Invest in the U.S. Real Estate Market  
Session D (*Xavier Auditorium*): How to Invest in the Silicon Valley Venture Capital Funds  
Session E (*Maraschi Room*): Legal Issues Involved in Cross-Border M&A  
12:15—1:30pm      Networking Lunch and Concluding Remarks (*Maraschi Room*)  
  
2:00—4:00pm      USF-hosted Tour of San Francisco City Hall  
Meet at USF Memorial Gym for bus to City Hall  
2:00—4:00pm      B2B Networking Meeting (Lone Mountain 100)

## Day Four: Sunday, March 1

Post-Conference Optional Activities

12:00—8:00 pm      Sonoma Valley Wine Tasting Tour (Box lunch provided)  
Bus Service provided from USF and Hotel G

# Welcome Message from the President, Paul J. Fitzgerald

Dear Conference Participants,

I wish you a warm welcome to the University of San Francisco, the first university in San Francisco, founded in 1855.

USF is proud to present, Cracking the U.S. Market: Opportunities and Threats for Chinese Multinationals. This three-day international conference sponsored by USF's China Business Studies Initiative, is the first of its kind to bring scholars, investors, business executives and policy makers together to address the challenges of building a reliable platform to engage Chinese investors and encourage the establishment of business partnerships with actors in the United States.

The China Business Studies Initiative was established last year to promote research and development focused on China and the globalization of Chinese businesses. This conference is CBSI's first major undertaking in achieving this goal. We are happy that you have joined us for this historic occasion.

This year the University celebrates the 160th anniversary of its founding. USF has long had extensive connections with China through its deeply rooted Jesuit tradition and its global Jesuit networks. We are very proud to have many renowned alumni/ae from China, including Yin Wang, Vice Chairman of China Resources Holding and Chairman and CEO of Pacific Alliance Group. Currently, USF has over a thousand students from China studying on campus. They bring rich cultural perspectives to the Hilltop. Last October, I spent two weeks in China meeting alumni/ae, parents, executives, journalists and educators. However, this was not my first trip to China. In 1991, I had a wonderful experience as a lecturer at the Education College in the beautiful coastal city of Xiamen.

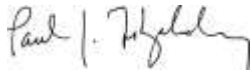
As conference participants join together in thoughtful dialogue and the sharing of knowledge and insights to explore solutions to the challenges that Chinese businesses encounter when investing in the United States, I offer you our good will and wish you great success.

I invite you to explore our campus, situated in the heart of San Francisco and its many treasures, including the historical landmark St. Ignatius Church, and especially the Matteo Ricci Institute for Chinese-Western Cultural History. The institute is home to a unique research library containing 75,000 volumes focused on Jesuit missions to China during the 16th to 18th centuries and a wide range of materials on the history of cultural interactions between China and the West.

Thank you for being a part of this exciting event!

Happy Chinese New Year! 新年快乐! 恭喜发财! Gung Hay Fat Choy!

Sincerely,



Rev. Paul J. Fitzgerald, S.J.  
President  
University of San Francisco



# Welcome Message from the Provost, Jennifer E. Turpin

Dear Guests,

Welcome to the University of San Francisco. The China Business Studies Initiative at USF is pleased to present Cracking the U.S. Market: Opportunities and Threats for Chinese

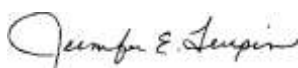
Multinationals, its inaugural international conference. This conference is the first of its kind to bring scholars, investors, business executives, and policy makers together to address issues faced by Chinese multinationals seeking to crack the U.S. market.

This collaborative, three-day conference will feature panel discussions and roundtables for a robust exchange of ideas, strategies, and solutions to the challenges that face Chinese businesses seeking to invest in the United States. We look forward to the beneficial sharing of knowledge and insights as we evaluate the impact of current policy and set a research agenda for the future.

In addition to the sessions, we hope you enjoy exploring San Francisco, Silicon Valley, and winemaking regions of Northern California and celebrating the Chinese New Year. We also wish to share the University of San Francisco's story with you as the City of San Francisco's first university, established in 1855. With a location in the heart of one of the most intense business ecosystems in the world, USF's School of Management offers a highly-engaged and individualized business education committed to developing compassionate and productive leaders like yourselves.

Thank you for attending, and Gung Hay Fat Choy!

Sincerely,



Jennifer E. Turpin  
Provost and Vice President for Academic Affairs  
University of San Francisco



# Welcome Message from the Dean, Elizabeth B. Davis

Dear Conference Participant,

It is my great pleasure to welcome you to the School of Management and to our China Business Studies Initiative's inaugural international conference: Cracking the U.S. Market: Opportunities & Threats for Chinese Multinationals.

The school has been educating students to build more productive and compassionate organizations since its founding in 1925.

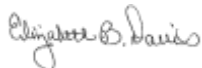
The school is a catalyst for change in business, government and non-profit managerial practice. Our outstanding faculty embodies the global, entrepreneurial spirit that defines the San Francisco Bay Area and they reflect the University's broader social justice and humanitarian values. Our students are challenged to connect critical thought with purposeful action, to go beyond their rigorous academic curriculum to develop ethical management practices. Both our undergraduate and graduate students emerge with the desire to change the world and the skills to be able to do so.

The school provides a learning environment that fosters an entrepreneurial mindset through a unique combination of theoretical and applied approaches. We pride ourselves on our diverse demographic of students, including over 700 current students from China and many from other international communities. With that in mind, the China Business Studies Initiative was created to facilitate research and development focused on China and the globalization of Chinese businesses.

The goal of this historic conference is to provide participants with a forum where world-renowned scholars, investors, business executives, and policy makers can share their knowledge and insights, and set a research agenda for the future of Chinese-U.S. business partnerships. As a conference participant, you will have the opportunity to familiarize yourself with cutting-edge scholarly and practitioner research, match your business with a potential Chinese investor and explore business venture opportunities across sectors including technology, real estate, winemaking, infrastructure, retail, e-business, and health care. We welcome the opportunity to showcase a startup or established company's product and business model to business leaders, investors, and scholars.

Along with these interactions, we are also pleased to welcome keynote speakers, Dr. Marshall Meyer, Tsai Wan-Tsai Professor Emeritus in the Wharton School of Business, University of Pennsylvania, and Mr. Wayne Wang, Founder and CEO, CDP Group, as well as Dr. Mike Peng, Jindal Chair of Global Strategy at the Jindal School of Management, University of Texas at Dallas, and Mr. "Ted" Tatsuhiro Tokuchi, Managing Director & Chairman of the Investment Banking Committee, CITIC Securities Co., Ltd. By combining these academic and the professional perspectives, we hope to broaden the conversation about opportunities for future collaborations.

Thank you for being a part of this important event! 恭喜发财!



Elizabeth B. Davis  
Dean, School of Management



## Welcome Message from CBSI Director and Conference Chair, Xiaohua Yang

Happy Chinese New Year! 祝各位来宾新年快乐!

Welcome to San Francisco and the University of San Francisco! The China Business Studies Initiative (CBSI) at the University of San Francisco and its Conference Organizing Committee welcome you to our inaugural international conference: Cracking the U.S. Market: Opportunities & Threats for Chinese Multinationals. This conference aims to address the issues faced by Chinese multinationals seeking to crack the U.S. market. Join us as we discuss and share knowledge and insights, evaluate the impact of current policy, search for solutions to challenges and problems and set a research agenda for the future.

As a gateway to China, San Francisco and the Bay Area are home to numerous Chinese firms investing in the US. Silicon Valley, being the world's hub of innovation and technology, is attracting an increasing number of Chinese start-ups who want to explore their business opportunities in the region.

The conference organizing committee has meticulously designed an interactive conference for the world leading thinkers, experts, business leaders and policy makers to gather on the same platform for a robust and open exchange of ideas, discussion of strategies and solutions to the challenges that face Chinese businesses seeking to invest in the United States.

The Milken Institute's 2014 "Best-Performing Cities" index ranks San Francisco as the country's number one best performing city in job creation, especially in the booming technology sectors. San Francisco means business, culture and the future, with one of the most vibrant Asian/ Chinese communities in the country. The business partnership and cultural exchange between the San Francisco Bay Area and China is profound and has a wide scope. We would like you to experience the vibrancy and beauty of San Francisco while at the conference. Apart from the formal program, we have organized a variety of activities, including a Centennial tour of San Francisco's City Hall, business receptions, B2B networking events, a Sonoma County wine tour and other exciting events.

I invite you to take advantage of these special events taking place immediately following our celebration of Chinese New Year to fully immerse yourself in the culture of San Francisco!

I hope you will have a rewarding time at the conference and around the city, meeting old friends and making new ones. I look forward to meeting each of you.

I wish you a Happy and Prosperous Year of the Goat! 祝大家羊年吉祥如意, 幸福快乐!



Xiaohua Yang  
Director and Conference Chair  
China Business Studies Initiative



# Organizers

## Conference Chair

Xiaohua Yang, University of San Francisco School of Management

## Program Co-Chairs

Barry Doyle, University of San Francisco School of Management

Mary Teagarden, Arizona State University

Liang Wang, University of San Francisco School of Management

## Site Committee Chair

Gleb Nikitenko, University of San Francisco School of Management

## Committee members

Stanley Kwong, B2B networking event coordinator, University of San Francisco School of Management  
Thomas Maier, University of San Francisco School of Management

## Finance and Development Committee Chair

Erin Grogan, University of San Francisco School of Management

## Committee members

Jennifer Ratliff, University of San Francisco School of Management

Daryl Cook, University of San Francisco School of Management

## Conference Program Committee Members

Karl Boedecker, University of San Francisco School of

Management Roger Chen, University of San Francisco School

of Management Ping Deng, Monte Ahuja College of Business

Sara Ding, University of San Francisco School of Management Monika

Hudson, University of San Francisco School of Management

Isabelle Lescent-Giles, Coordinator for Roundtable Sessions, University of San Francisco School of Management

W. Travis Selmier II, Indiana University, The Vincent and Elinor Ostrom Workshop in Political Theory and

Policy Analysis Tina Tan, CBSI Graduate assistant, University of San Francisco School of Management

Yinan (Ian) Wang, China Coordinator, DeHeng Law Offices, China

William Wei, Coordinator for Key Panel Sessions, MacEwan

University, Canada Asia Pacific Management Program

Haifeng Yan, East China University of Science and Technology

# Keynote Speakers

## **Marshall W. Meyer**

### **Wharton School of the University of Pennsylvania**

Marshall W. Meyer is the Tsai Wan-Tsai Professor Emeritus in the Wharton School of the University of Pennsylvania, where he is also Professor of Management and Sociology Emeritus, Associate Member of the Center for East Asian Studies and a member of the Executive Committee of the Center for the Study of Contemporary China. Meyer served as Executive Senior Editor of Management and Organization Review and The Journal of the International Association for Chinese Management Research and remains a member of its Editorial Advisory Board. He is also a member of the Editorial Advisory Board for the International Journal of Emerging Markets. He was Associate Editor of Administrative Science Quarterly from 1987 to 1995 and has served on the editorial boards of the American Sociological Review, among other editorial credentials. His recent presentations include the opening keynote address for the China Goes Global Conference at the JFK School of Government, Harvard University, and an opening keynote address to the special China meeting of the Strategic Management Society. He also gave the keynote address for the year-end strategy meeting of the Haier Group in Qingdao, China and gave the keynote address for the Penn China Forum, among others. Meyer's forthcoming publications include: "Going Out by Going In: Business Model Innovation with Chinese Characteristics" and "From Self-Management to Self-Ownership: Teams as the Building Blocks of the Firm." Last September, the Paulson Institute of the University of Chicago released their policy brief, coauthored with Wu Changqi, on "Making Ownership Matter: Prospects for China's Mixed Ownership Economy," which has been widely circulated among decision makers in the PRC.

## **Mike Peng**

### **Jindal Chair of Global Strategy, University of Texas at Dallas**

Mike W. Peng (Ph.D., University of Washington) is the Jindal Chair of Global Strategy at the University of Texas at Dallas, a National Science Foundation CAREER Award winner and a Fellow of the Academy of International Business. With over 100 articles, close to 14,000 Google citations and an H-index of 49, he is widely regarded as one of the most prolific and most influential scholars in global strategy. His textbooks, Global Strategy, Global Business, and GLOBAL, have been translated into Chinese, Portuguese, and Spanish and has been used in over 30 countries. He has consulted for multinationals (AstraZeneca, SAFRAN, and Texas Instruments) and governments and international organizations (U.K. Government Office for Science and The World Bank). In China, he has visited and given seminars at Xi'an Jiaotong University, Shanghai Jiao Tong University, Renmin University, Sun Yat-sen University, Tongji University, Tsinghua University, China-Europe International Business School, Chinese University of Hong Kong, University of Hong Kong, and City University of Hong Kong.

## **Tatsuhito “Ted” Tokuchi**

### **Managing Director & Chairman, Investment Banking Committee at CITIC Securities Co., Ltd.**

Tatsuhito “Ted” Tokuchi was born in Tokyo in 1952. He is Managing Director & Chairman of the Investment Banking Committee at CITIC Securities Co., Ltd. Joining CITIC Securities in 2002, he has since participated and led in many large-cap Chinese state-owned enterprise bond offerings, M&A, advisory, restructurings, and IPOs, which include the IPOs of the four largest Chinese banks. Prior to CITIC Securities, Tokuchi spent more than 20 years at Daiwa Securities Group Inc., where he was responsible for the firm’s international investment banking business. At Daiwa Securities he held positions including General Manager, Investment Banking Division & Chief Beijing Representative Daiwa Securities SMBC Co., Ltd., President/ CEO Daiwa Securities Singapore Limited, Director and Executive Vice-President Daiwa Securities Ltd. in Hong Kong and Vice-President Daiwa Securities Inc. in America. During his time in Singapore, he served as Vice-Chairman of the Singapore Investment Banking Association. Tokuchi is currently a researcher and a board member of the Center for Industrial Development and Environmental Governance (CIDEG) of Tsinghua University and a foreign advisor of the Advisory Committee at State Administration of Foreign Experts Affairs. He received his MA (China’s Economy) from Stanford University and BA from Beijing University. He has edited two books, one on Chinese company IPOs overseas and another on Chinese domestic restructurings. In 2009, he was awarded the China Friendship Award, China’s highest honor for foreigners who have made outstanding contributions to China’s economic and social progress.



# Program Agenda

## Day One

Thursday, February 26

**Transamerica Building and Julia Morgan Ballroom  
Downtown San Francisco**

### Opening Ceremony

**Transamerica Pyramid Building, 48th Floor  
600 Montgomery St., San Francisco**

3:30—4:00pm

### Registration

4:00—4:30pm

Welcoming Remarks:

Xiaohua Yang, Conference Chair

Elizabeth Davis, Dean of USF School of Management

Honorable Ambassador Luo Linqun, Chinese Consul General San

Francisco Jim Wunderman, President and CEO of the Bay Area Council

Jian Wang, General Manager, Bank of China SME Department

4:30—5:00pm

**Keynote: High-Velocity Management Innovation: China's Next Export? Marshall Meyer, Wharton School of Business**

Sponsored by the Yuan-li Wu Lecture Series at the USF Center for Asia Pacific Studies

Introduced by Melissa Dale, Executive Director, Center for Asia Pacific Studies

5:20—6:15pm

### Reception Co-hosted by ChinaSF and Sterling Bank & Trust

Welcome Remarks: Darlene Chiu Bryant, Executive Director, ChinaSF, City of San

Francisco Scott J. Seligman, President, Sterling Bank & Trust

6:15—7:30pm

*Julia Morgan Ballroom, Merchants Exchange, 465 California Street, 16th Floor, San Francisco, CA 94104*

Chinese New Year Celebration Co-hosted by Bay Area Council

Day Two

Friday, February 27

USF Main Campus, Fromm Hall

8:30—9:00am *Xavier Auditorium*

Opening by Dean Elizabeth B. Davis, USF School of Management  
Welcome by USF Vice President, Peter Wilch  
Welcome Speech by Da Hua Tan, Deputy Mayor, City of San Francisco  
Introduced by Darlene Chiu Bryant, Executive Director, City of San Francisco

9:00—9:30am *Xavier Auditorium*

Keynote: How History Can Inform the Debate Over Intellectual Property? Mike Peng, Jindal Chair of Global Strategy, University of Texas at Dallas

Introduced by Liang Wang, Conference Program Co-Chair, University of San Francisco

9:30—9:45am *Commons Court Atrium*

Tea Break

9:45—11:00am *Xavier Auditorium*

Key Panel One: China-North America Investment Relations: Myth and Reality

Introductory Speech: Honorable Robert Hertzberg, California State Senator  
Organizer and Moderator: Tatoul Manasserian, Center for Education, Policy Research, Economic Analysis

Panelists:  
Mike Henry, MacEwan University  
Jeff Leader, California Senator Advisory  
Henry Huiyao Wang, Center for China & Globalization  
Changqi Wu, Beijing University  
Xian Xu, Chinese Consulate General in San Francisco

11:00—12:15pm

Concurrent Sessions - Panel A was designed for Practitioners

Panel A: *Xavier Auditorium*

M&A of Chinese firms: Challenges and Opportunities  
Moderator: Jeff Wu, Executive Vice President of Pactera, China

Title	Authors
Chinese Outbound M&A: Unsolicited and Contested Situations?	Eva Su, Institutional Shareholder Services
Pactera's Expansion Strategy in the US – The Dilemma of Going International	Tingting Guo, James Brownson, Walter Petruska, University of San Francisco
"One Country, Two Systems" Integration Strategy of Chinese Cross-border M&A	Katherine Xin, Yuan Ding & Lily Zhang, China Europe International Business School

Panel B: *Maier Room*

Adaptation to the U.S. Market & Challenges of Localization  
Moderator: Lawrence M. Akwetey, Coventry University London Campus, U.K.

Title	Authors
Ambidextrous learning in emerging economy MNEs	Shimin Liu, Tiedong Wang, University of International Business and Economics
Emerging Market Multinationals: Towards An Action-Based Perspective On Firm Competition	Anoop Madhok and Rogerio Marques, York University

Measuring the Tax Burden and Selecting the Tax Strategies for the Chinese Overseas-Investing Enterprises	Bei Zhang, Yanying Zhang, Wuhan University of Science and Technology
Organizational Cross-Cultural Adaptation: A Multiple-Case Study of Chinese Firms Operating in the United States	Jing Betty Feng, Farmingdale State College

Panel C: *Berman Room*

Image: Managing Skepticism Toward the Globalization of China Business

Moderator: Karl Boedecker, University of San Francisco

Title	Authors
The Cultural Sensitivity of Chinese Companies with Cross-border Operations in the U.S.	Yuping Du, Guangdong University of Foreign Studies/Suffolk University
What Japanese Bank Expansion Can Teach Us about Chinese Bank Globalization: The U.S. case in the 1980s	W, Travis Selmier II, Ostrom Workshop in Political Theory and Policy Analysis, Indiana University
Motives of outward internationalization in China: a multi-dimensional analysis of Chinese SOEs and POEs	Tiange Gao and Yingjun Liu, Zhejiang Industry and Trade Vocational College
The GSK Bribery Scandal in China	Cindy A Schipani, University of Michigan Junhai Liu, Renmin University of China Haiyan Xu, University of International Business and Economics

12:45—1:55pm *Maraschi Room*

#### Luncheon

**Introductory Speaker: Xingyue He, President, Zhejiang Industry and Trade College**

#### A Conversation with Education Leaders

#### What is the Role of Education Institutions in China Going Global?

Moderator: Dr. Chiekwe Bernadette (Chi) Anyansi-Archibong, Professor of Strategic Management, North Carolina A&T

State University Panelists:

Elizabeth Davis, Dean, USF School of Management

Mike Henry, Associate Dean, MacEvan University Business School

Tiedong Wang, Associate Dean, UIBE Business School

Jiang Wei, Associate Dean, Strategic Development Institute, Zhejiang University

2:00—3:15pm *Maraschi Room*

#### Business-to-Business Networking Meeting

2:00—3:15pm

#### Concurrent Sessions - Panel A was designed for practitioners

Panel A: *Maier Room*

Investing in the US Through EB-5: A Practitioner's Perspective

Moderator: Kevin Callaghan, Aspyre Capital Group LLC

Title	Authors
Global Mobility and the EB-5 Program	Kevin Callaghan, Aspyre Capital Group
Structuring EB-5 Transactions	Ginny Fang, Golden Gate Global
Critical Steps and Challenges in EB-5	Martin Lawler, Esq., Lawler & Lawler Law Offices
Leveraging Leverage for Chinese Investors	Sarah Wang, Henry Global Capital

Panel B: *Xavier Room*

Overseas M&A with Chinese Characteristics

Moderator: Yvonne Fu, International Tax - Director, Burr Pilger Mayer, Inc.

Title	Authors
Antecedents of Overseas M&As by Chinese Firms in Developed Economies	Ping Deng, Cleveland State University
China's Outbound Merger & Acquisition in US Lessons from the Unsuccessful Deals	Xiaoyan Jin, Zhejiang Industry and Trade Vocational College Shengle Lin, San Francisco State University Yili Zhang, Wenzhou University
China's M&A Activities in the US: Strategic Intent and "Home-Market Perspective	Peter Hertenstein, University of Cambridge
Post Merger Integration by Emerging Market Multinationals- Perspectives from Chinese M&As	Etayankara Muralidharan, William Wei, MacEwan University

Panel C: *Berman Room*

Entrepreneurship, Innovation & Technology Transfer by Chinese Multinationals

Moderator: Gleb Nikitenko, University of San Francisco

Title	Authors
The Technical Innovation and Intellectual Property Countermeasures of Chinese MNC	Xingyue He, Zhejiang Industry & Trade Vocational college
Wholly-owned or partially-owned ownership: the entry modes of global R&D from Chinese Firms	Jiang Wei, School of Management, Zhejiang University
Reverse Knowledge Transfer by Emerging Economy Multinationals: Evidence From Chinese MNEs in the U.S.	Xiaohua Yang, Cindy Qing, Roger Chen, Mark Cannice, Zeyu Peng, University of San Francisco (for the first 4 authors), East China University of Science and Technology (last author)
Knowledge transfer in large international Chinese SOEs. How are women participating?	Ausma Bernotaite, Michal Lemanski, The University of Nottingham Ningbo China

3:15—4:30pm *Commons Court Atrium*

**Tea Break**

3:30—4:45pm

**Concurrent Sessions - Panel A was designed for practitioners**

Panel A: Practice Focus *Maier Room*

Multiple Facets of Chinese Going Global

Moderator: Richard Gregory Johnson III, University of San Francisco

Title	Authors
Study on the "Landing" of Clustered Outward Foreign Direct Investment of Private Enterprises - Based on the organizational learning theory, theory of motivation factors combination; with Zhejiang Province as an example	Xie Min, Yingjun Liu, Zhejiang Industry & Trade Vocational College
Anti-corruption Challenges and Opportunities in the US-China Relations: Integrating Compliance, Capacity and Competence	Marco Tavanti, University of San Francisco
Mode Selection and Related Tax Issues in the Chinese Enterprises' Investment in the United States	Bei Zhang, Yanying Zhang, Wuhan University of Science and Technology
Promoting Creativity: China's Redefinition of the Student-Teacher Relationship	Monika Hudson & Keith Hunter, University of San Francisco

Panel B: *Xavier Auditorium*

Performance Implication of M&A Strategy for the Chinese Multinationals

Moderator: Yuan Ding, China Europe International Business School, China

Title	Authors
An Analysis of Short-term and Long-term Performance of Cross-border M&As by Emerging Market Firms in the U.S. market	Monica Yang, Adelphi University
A Comparison of Chinese Reverse Merger and IPO Firms in U.S. Markets: Is Something Fishy Going On?	Daniel Borgia, University of Idaho Travis Jones, Florida Gulf Coast University Yixuan Huang, University of Nottingham Ningbo China
Cross-border Mergers and Acquisitions and Earnings Quality: Evidence from China	Sara Xiaoya Ding, University of San Francisco Jiaying Mo, Southwestern University of Finance and Economics Ligang Zhong, University of Windsor

Panel C: *Berman Room*

Performance Chinese Multinationals in Other Countries as Compared to U.S.

Moderator: Christina Yu-Ping Wang, National Sun Yat-sen University, Taiwan

Title	Authors
Market entry strategies and performance of Chinese firms in Germany: The moderating role of international experience and government support	Dirk Holtbrügge, Sue Claire Berning, University of Erlangen-Nuernberg Germany
Comparing the survival of emerging country (China) and developed country (U.K.) firms in the U.S.	Kun Yang, Central Michigan University
Chinese Multinational Corporation and type of insertion in México	Jorge Carrillo, El Colegio de la Frontera Norte (COLEF); Jordy Micheli, Universida Autonoma Metropolitana-Azcapotzalco (UAM-A)
China's Business, Economic And Humanitarian Influences On the African Continent	Lawrence M. Akwetey, Coventry University London Campus

Panel D: *Maraschi Room*

Impact of CSR Philosophy and Practice in China vs. America

Moderator: Jane Lu, University of Melbourne, Australia

Title	Authors
Corporate Philanthropy and Corporate Financial Performance: An Institutional Comparison between China and the United States	Heli Wang, Singapore Management University Jane Lu, University of Melbourne Xueji Liang, National University of Singapore
What Internationalization Brings to Firms From Emerging Markets? A Corporate Social Responsibility Perspective	Haifeng Yan, Yunlong Liu, Juan Wang, Yiqiong Qin, East China University of Science and Technology
Employee Satisfaction, An Indicator of Favourable Investees? Empirical Research On The Relationship Between Being A Best Employer And Corporate Performance Across The Us And Chinese Entities	Chen Liu, University of Nottingham Ningbo China

4:45—6:00pm *Berman Auditorium*

**Key Panel Two: Innovation and Sustainable Growth of Chinese**

**Enterprises Introductory Speech: David Chen, President, Pactera**

**Organizer and Moderator: Roger Chen, University of San Francisco**

Panelists:

Alan Chen, CEO, Perfect World Entertainment

Inc. Jane Li, COO, Huawei Enterprise US

Justin Tan, York University

Qing Wu, Senior Economist and Economic Analyst, Google

4:45—6:00pm *Xavier Auditorium*

**Key Panel Three: Patterns and Trends in Chinese Overseas M&As**

**Introductory Speech:** Peter Li, Copenhagen Business School, Denmark

**Organizer:** Peter Ping Li, **Moderator:** Mary Teagarden, Thunderbird School of Global Management, USA

Panelists:

Edwin Qi Ai, Royal Holloway University of London, UK

Ping Deng, Cleveland State University, USA

Anoop Madhok, York University, Canada

Mary Teagarden, Thunderbird School of Global

Management, USA Vivien Wang, Partner, Deloitte, USA

6:00—6:30pm

**Campus Walk to Lone Mountain**

6:30—8:30pm

Conference Gala Dinner *Del Santo Reading*

*Room Appreciation Certificate Presentation*

A fireside conversation with Banking Experts, Andrew Pan, SVP of China Business and Strategy and Beverly Bian, First Vice President, East West Bank, and Stella Li, Senior VP of BYD Company Ltd. and Head of BYD US Corporation

“How does a bank enable Chinese outbound foreign direct investment?” Moderated by Rebecca Fannin, Silicon Dragon News

## Day Three

**Saturday, February 28**

**USF Main Campus, Fromm Hall**

8:30—9:15am *Xavier Auditorium*

**Keynote Speech: Where Is China Headed?**

Tatsuhito “Ted” Tokuchi, CITIC Securities Co., Ltd

Introduced by Travis Selmier, Indiana University

9:15—10:30am *Xavier Auditorium*

**Key Panel Four: Language, Culture, Politics and Precedents- Challenges for Incoming**

**Chinese FDI Organizer:** Travis Selmier, Indiana University

**Moderator:** William Wei, MacEvan University

Panelists:

Robert Jones, Eco Link Foundation

Margret Kim, California Air Resources

Marjorie Lyles, Indiana University Travis

Selmier, Indiana University

Tatsuhito “Ted” Tokuchi, CITIC Securities Co., Ltd

10:30—10:45am *Commons Court Atrium*

**Tea break**

10:45—12:15pm

**Theory meets practice: Roundtable sessions**

Session A: *Maier Room*

**Mitigating U.S. Litigation Risks for Chinese Companies**

Organizer and Moderator: Zheng (Jen) Liu, Orrick Herrington Sutcliffe Experts:

Zheng (Jen) Liu and Warrington S. Parker, Orrick Herrington Sutcliffe

Daniel Weinberg, Freitas Angell & Weinberg, LLP

Session B: *Maraschi Room*

**Beyond Philanthropy: Sustainability Reporting and Corporate Social Responsibility for Community Engagement**

Organizer: Marco Tavanti, University of San Francisco

Experts: Marco Tavanti and Jennifer Walske, University of San Francisco; Marilyn Taylor, University of Missouri at Kansas City

Session C: *Berman Room*

**How to Invest in the US Real Estate Market**

Organizer and Moderator: Kevin Callaghan, Aspyre Capital Group

Experts: Kevin Callaghan, Aspyre Capital Group, Darlene Chiu-Bryant, ChinaSF, Arthur Wang, Zarsion Group, I-Fei Chang,

Greenland USA Holding, and Martin Polevoy, DLA Piper.

Session D: *Xavier Auditorium*

**How to Invest in the Silicon Valley Centure Capital Funds**

Organizer and Moderator: Mark Cannice, University of San Francisco

Experts: Mark Cannice, University of San Francisco, Debra Guerin Beresini, invencor, Inc., and Robert Winter, daVinci Captial Group

Session E: *Maraschi Room*

**Legal Issues Involved in Cross-Border M&A**

Organizer and Moderator: Yinan Wang, DeHeng Law Office, Beijing

Experts: Frank Li, DeHeng Law Offices (Beijing Office) and Yinan Wang, DeHeng Law Office (Beijing Office)

12:15—1:30pm *Maraschi Room*

**Networking Lunch and Closing Ceremony**

Plenary Speech: Edwin Lee, Mayor of San Francisco (scheduled)

Plenary Speech: Jian Wang, General Manager, Bank of China SME Department

Concluding remarks from the conference organizers: Xiaohua Yang, Barry Doyle, Erin Grogan, Gleb Nikitenko, Mary Teagarden, and Liang Wang

2:00—4:00pm

**USF-hosted Tour of the San Francisco City Hall**

Meet at the USF Memorial Gym for bus to City Hall

2:00—4:00pm

**B2B Networking Meeting, Co-hosted by Bay Area Council, ChinaSF and Chinese Enterprise Association of Northern California**

Participating Firms include Bank of China, East West Bank, Silicon Valley Bank, Deloitte, Pactera, Burr Pilger Mayer, Inc. More Health and Tian Xia, Zarsion and many more.

## Day Four

Post-Conference Optional Activities

**Sunday, March 1**

12:00—8:00 pm

**Sonoma Valley Wine Tasting Tour**

# USF School of Management

USF's School of Management offers a wide range of studies including undergraduate business degrees, graduate studies, international and corporate programs. We give our students the tools they need to prepare themselves for productive and rewarding careers.

As a socially responsible university, USF's mission is to educate business leaders on how to create a more humane and just world. Located in the epicenter of global innovation, USF is engaged in all of the cultural, intellectual and economic resources the Bay Area has to offer.

Our programs provide students the chance to work in the global marketplace through immersion programs in Silicon Valley. However, the reach of our programs extend beyond Silicon Valley through our Globalization Program, which partners students with emerging companies so they can gain experience in high-risk, high-growth ventures.

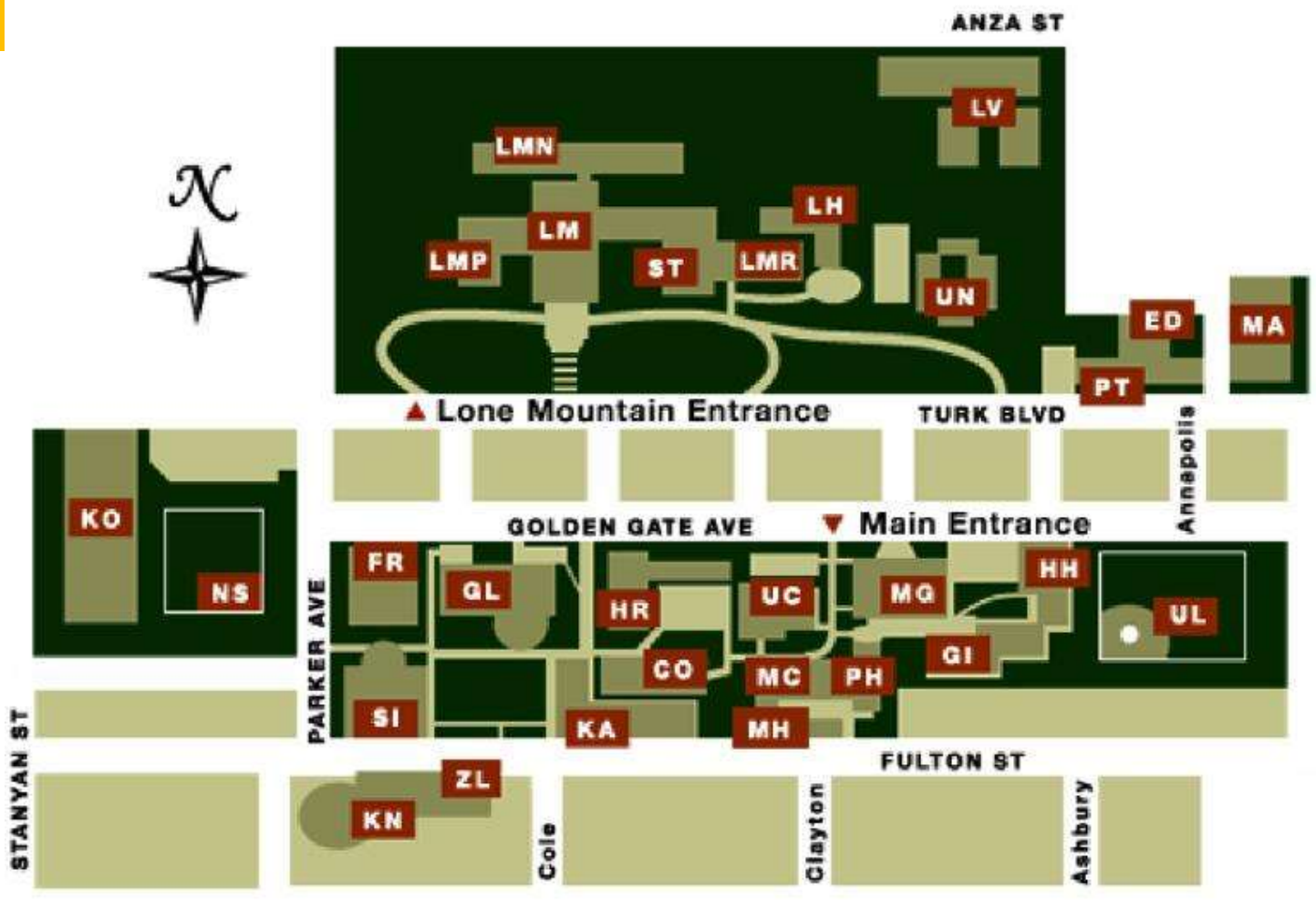
No matter what you want to achieve in business, USF's School of Management can help.

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The core mission of the University is to promote learning in the Jesuit Catholic tradition. The University offers undergraduate, graduate and professional students the knowledge and skills needed to succeed as persons and professionals, and the values and sensitivity necessary to be men and women for others.

The University will distinguish itself as a diverse, socially responsible learning community of high quality scholarship and academic rigor sustained by a faith that does justice. The University will draw from the cultural, intellectual and economic resources of the San Francisco Bay Area and its location on the Pacific Rim to enrich and strengthen its educational programs.





### Main Campus

CO Cowell Hall  
 FR Fromm Hall  
 GI Gillson Hall  
 GL Gleeson Library  
 HH Hayes-Healy Hall  
 HR Harney Science Center  
 KA Kalmanovitz Hall  
 MC McLaren Conference Center  
 MG Memorial Gymnasium  
 MH Malloy Hall  
 PH Phelan Hall  
 SI Saint Ignatius Church  
 UL Ulrich Field & Benedetti Diamond  
 UC University Center

### School of Law

KN Kendrick Hall  
 ZL Dorraine Zief Law Library

### Lone Mountain Campus

LH Loyola House  
 LM Main Bldg/Classrooms/Study Hall  
 LMN Lone Mountain North  
 LMP Pacific Wing  
 LMR Rossi Wing/Administration  
 LV Loyola Village  
 ST Studio Theater  
 TC Tennis Courts  
 UN Underhill Building ROTC/Upward Bound

### Koret Health & Recreation Center

KO Koret Center

### School of Education

ED School of Education  
 PT USF Presentation Theater

### 281 Masonic

MA 281 Masonic

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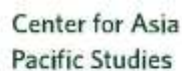
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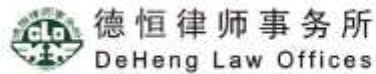


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Bank of China was formally established in February 1912. The Bank served consecutively as the country's central bank, international exchange bank and specialized international trade bank. In 1994, the Bank was transformed into a wholly state-owned commercial bank. In August 2004, Bank of China Limited was incorporated. The Bank was listed on the Hong Kong Stock Exchange and Shanghai Stock Exchange in June and July 2006 respectively, becoming the first Chinese commercial bank to launch an A-Share and H-Share initial public offering and achieve a dual listing in both markets. In 2013, Bank of China was enrolled again as a Global Systemically Important Bank, becoming the sole financial institution from emerging economies to be enrolled for three consecutive years. As China's most international and diversified bank, the Bank provides a comprehensive range of financial services to customers across the Chinese mainland, Hong Kong, Macau, Taiwan and 38 countries. The Bank's core business is commercial banking. BOC International Holdings Limited, a wholly owned subsidiary, is the Bank's investment banking arm. Bank of China Group Insurance Company Limited and Bank of China Insurance Company Limited, both wholly owned subsidiaries, run the Bank's insurance business. Bank of China Group Investment Limited, a wholly owned subsidiary, undertakes the Bank's direct investment and investment management business. Bank of China Investment Management Co., Ltd., a controlled subsidiary, operates the Bank's fund management business. BOC Aviation Pte. Ltd., a wholly owned subsidiary, is in charge of the Bank's aircraft leasing business. Bank of China has upheld the spirit of "pursuing excellence" throughout its hundred-year history. With adoration of the nation in its soul, integrity as its backbone, reform and innovation as its path forward and "people first" as its guiding principle, the Bank has built up an excellent brand image that is widely recognized within the industry and by its customers. Faced with new

historic opportunities, the Bank will meet its social responsibilities, strive for excellence, and make further contributions to achieving the China Dream and the great rejuvenation of the Chinese nation.

中国银行成立于1912年,长期以来都是我国的外汇外贸专业银行,是国家利用外资的主渠道。1994年中国银行改为国有独资商业银行,2004年8月中国银行股份有限公司挂牌成立,2006年6月、7月,中国银行先后在香港联交所和上海证券交易所成功挂牌上市,成为国内首家“A+H”发行上市的中国商业银行。2013年,中国银行再次入选全球系统重要性

银行,成为新兴市场经济体中唯一连续3年入选的金融机构。中国银行是中国国际化和多元化程度最高的银行,在中国内地、香港、澳门、台湾及38个国家为客户提供全面的金融服务。主要经营商业银行业务,包括公司金融、个人金融、和金融市场业务,并通过全资子公司开展投资银行、保险、直接投资和投资管理、基金管理、飞机租赁等业务。在一百多年的发展历程中,中国银行始终秉承追求卓越的精神,将爱国爱民作为办行之魂,将诚信至上作为立行之本,将改革创新作为强行之路,将以人为本作为兴行之基,树立了卓越的品牌形象,得到了业界和客户的广泛认可和赞誉。面对新的历史机遇,中国银行将积极承担社会责任,努力做最好的银行,为实现中华民族伟大复兴的中国梦做出新的更大贡献。



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First Vice President  
East West Bank – China Business Banking  
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The China Business Studies Initiative promotes research and development focused on China and the globalization of China business.

The Initiative bridges China business leaders, public policy makers, and academics to the San Francisco community and the

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## [USF] China's New Investment Strategy: a Reality Check

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Xiaohua Yang <xyang14@usfca.edu>  
5:00 PM Reply-To: xyang14@usfca.edu  
To: "ccain@usfca.edu" <ccain@usfca.edu>

Wed, Aug 19, 2015 at

[View this email in a web page](#)



## China's New Investment Strategy: A Reality Check

Thursday, Aug. 27 | 4–5:30  
p.m. Reception | 5:30–6:30  
p.m.

Xavier Room, Fromm  
Hall 2130 Fulton St.  
USF Hilltop Campus

The University of San Francisco's School of Management China Business Studies Initiative invites you to join us for a discussion on China's new investment strategy. Come and hear expert views on US-China investment relations and how changes in Chinese equity markets are likely to affect Chinese outbound investment.

This event is free and open to the public.

**Learn more about the speakers and RSVP here »** Limited free parking will be available.

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## *Chinese Investments in California Real Estate*

中国投资加州的房地产

Saturday, Nov 21, 2015, 1PM to 5PM

Conference location: HANQI Investment Inc., 1633 Old Bayshore Hwy #280, Burlingame, CA 94010.



Vanke 万科集团 Lumina, Folsom Street, SF

Oceanwide 泛海控股, 1st and Mission, SF

University of San Francisco's China Business Studies Initiative, in cooperation with Hanqi Investments of Burlingame, will host our next conference on "Chinese investments in California Real Estates" on Saturday, Nov 21, 2015. (11 月 21 日星期六下午 1 点到 5 点)

According to a CBRE study, Chinese are now the biggest foreign buyers of U.S. housing. CBRE stated

\$28.6 billion were invested in commercial and residential properties in 2014. The Chinese see US real estate as a relatively moderate risk, high return investment, especially if buyers anticipate further RMB devaluation and market volatility.

With the Chinese government readying the launch of the Qualified Domestic Individual Investor (QDII2) program, this will likely bolster overseas real estate purchases on the part of the Chinese investors.

Wealthy Chinese are already the largest group of foreign real estate buyers in the U.S., with 16% of the single homes and condominiums purchased by foreign buyers snapped up by Chinese in 2014 (U.S. National Homebuyers Association).

We will discuss the issues and challenges facing these Chinese investors as well as opportunities for American businesses and local government on this evolving trend.

For additional information, please email: [chinabusiness@usfca.edu](mailto:chinabusiness@usfca.edu). Register at:

<https://www.eventbrite.com/e/chinese-investments-in-california-real-estates-tickets-18635357857>.



FREE Admissions!!! 免费参加



## **APPENDIX 13**

### **Peer-Reviewed Journal Articles, 2006-2010 and 2011-2015, and Citations**

### AACSB 2015 Report Appendix 13

Peer Reviewed Journal Articles Published by USF School of Management Faculty: 2006-2010 vs. 2011-2015

Journal	Journal Rating (ABDC)*	2006-2010 **	2011-2015 ***	Total
Academy of Management Learning and Education	A+	0	1	1
Accounting, Organizations and Society	A+	0	1	1
American Journal of Political Science	A+	1	0	1
Annals of Applied Statistics	A+	0	1	1
Annals of Tourism Research	A+	1	0	1
Boston University Law Review	A+	0	1	1
Decision Support Systems	A+	0	1	1
Entrepreneurship: Theory and Practice	A+	0	1	1
European Journal of Information Systems	A+	1	0	1
Human Resource Management (US)	A+	0	1	1
International Journal of Hospitality Management	A+	1	1	2
International Journal of Production Economics	A+	0	1	1
Journal of Corporate Finance	A+	0	2	2
Journal of Organizational Behavior	A+	0	2	2
Journal of Strategic Information Systems	A+	0	1	1
Journal of the Association for Information Systems	A+	1	1	2
Journal of Travel Research	A+	1	1	2
Journal of Vocational Behavior	A+	0	1	1
Organization Science	A+	0	1	1
Strategic Management Journal	A+	0	1	1
The Accounting Review	A+	0	1	1
Academy of Management Perspectives	A	0	1	1
Applied Economics	A	1	0	1
Applied Psychology: An International Review	A	0	1	1
Asia Pacific Journal of Management	A	6	2	8

Communications of the ACM	A	1	0	1
Communications of the Association for Information Systems	A	3	4	7
Cornell Hospitality Quarterly	A	1	2	3
Critical Perspectives on Accounting	A	2	0	2
Current Issues in Tourism	A	1	0	1
Economic Inquiry	A	1	0	1
Economics Letters	A	1	0	1
Financial Management	A	1	0	1
Group Decision and Negotiation	A	0	1	1
IBM Systems Journal	A	1	0	1
IIE Transactions	A	0	1	1
Information Technology and People	A	0	1	1
International Journal of Conflict Management	A	1	3	4
International Journal of Contemporary Hospitality Management	A	0	3	3
International Journal of Human Resource Management	A	0	1	1
International Journal of Operations and Production Management	A	0	1	1
International Review of Economics and Finance	A	0	1	1
Journal of Advertising	A	1	0	1
Journal of Advertising Research	A	1	1	2
Journal of Business Ethics	A	2	2	4
Journal of Business Logistics	A	0	1	1
Journal of Business Research	A	0	3	3
Journal of Consumer Affairs	A	0	1	1
Journal of Consumer Psychology	A	1	0	1
Journal of Hospitality and Tourism Research	A	1	0	1
Journal of Hospitality Marketing and Management	A	0	1	1
Journal of International Management	A	1	0	1
Journal of Occupational and Organizational Psychology	A	0	1	1
Journal of Public Administration Research and Theory	A	1	0	1
Journal of Travel and Tourism Marketing	A	2	2	4
Journal of Vacation Marketing	A	1	0	1
Journal of World Business	A	0	2	2

Kyklos	A	1	0	1
Macroeconomic Dynamics	A	1	0	1
MIT Sloan Management Review	A	0	1	1
Nonprofit and Voluntary Sector Quarterly	A	2	1	3
Political Communication	A	0	1	1
Production and Operations Management	A	2	0	2
Psychology and Marketing	A	0	1	1
Public Administration Quarterly	A	0	1	1
Public Administration Review	A	0	2	2
Public Relations Review	A	0	9	9
Quantitative Finance	A	0	1	1
R & D Management	A	0	1	1
Review of International Economics	A	1	0	1
Southern Economic Journal	A	2	0	2
The Journal of Futures Markets	A	0	1	1
The Journal of Portfolio Management	A	0	1	1
The World Economy	A	0	1	1
World Development	A	0	1	1
Accounting History Review	B	0	1	1
Administrative Theory and Praxis	B	3	0	3
Applied Economics Letters	B	0	2	2
Applied Financial Economics	B	0	1	1
Applied Psychological Measurement	B	0	1	1
Asia Pacific Journal of Tourism Research	B	1	3	4
Canadian Journal of Statistics	B	0	1	1
Comparative Political Studies	B	0	1	1
Computers in Human Behavior	B	0	1	1
Corporate Communications: An International Journal	B	0	1	1
Cultural Diversity and Ethnic Minority Psychology	B	0	1	1
Emergence: Complexity and Organization	B	1	0	1
Employee Relations: The International Journal	B	0	1	1
e-Service Journal	B	1	0	1

Industrial and Organizational Psychology	B	0	1	1
Interfaces	B	2	0	2
International Journal of Advertising	B	0	1	1
International Journal of Culture, Tourism and Hospitality Research	B	0	1	1
International Journal of Hospitality and Tourism Administration	B	0	2	2
International Journal of Nonprofit and Voluntary Sector Marketing	B	0	3	3
International Journal of Sport Communication	B	0	1	1
Journal of China Tourism Research	B	0	1	1
Journal of Communication Management	B	0	4	4
Journal of Consumer Marketing	B	0	4	4
Journal of Consumer Satisfaction, Dissatisfaction and Complaining Behavior	B	1	0	1
Journal of Convention Event Tourism	B	0	1	1
Journal of Financial Education	B	1	0	1
Journal of Hospitality and Tourism education	B	1	4	5
Journal of Hospitality and Tourism Management	B	0	1	1
Journal of Hospitality and Tourism Technology	B	0	1	1
Journal of Human Resources in Hospitality and Tourism	B	1	0	1
Journal of Information Systems Education	B	1	0	1
Journal of Investing	B	0	1	1
Journal of Management Education	B	0	3	3
Journal of Marketing Theory and Practice	B	1	0	1
Journal of Nonprofit and Public Sector Marketing	B	0	2	2
Journal of Product and Brand Management	B	0	2	2
Journal of Promotion Management	B	0	1	1
Journal of Public Affairs	B	0	1	1
Journal of Public Relations Research	B	0	4	4
Journal of Social Marketing	B	0	2	2
Leadership	B	0	1	1
Negotiation Journal	B	0	1	1
Project Management Journal	B	2	0	2
Research in International Business and Finance	B	1	0	1
Review of Quantitative Finance and Accounting	B	0	1	1

The Journal of Asset Management	B	0	1	1
Thunderbird International Business Review	B	2	0	2
Venture Capital: An International Journal of Entrepreneurial Finance	B	1	0	1
Academy of Marketing Studies Journal	C	1	2	3
Acta Turistica	C	1	0	1
Atlantic Economic Journal	C	0	1	1
Business and Society Review	C	0	1	1
European Journal of International Management	C	1	0	1
FIU Hospitality Review	C	0	1	1
Information Resources Management Journal	C	2	0	2
Internal Auditing	C	2	0	2
International Journal of Banking, Accounting and Finance	C	1	0	1
International Journal of Business and Emerging Markets	C	0	1	1
International Journal of Critical Accounting	C	1	1	2
International Journal of Emerging Markets	C	0	1	1
International Journal of Finance	C	1	0	1
International Journal of Integrated Supply Management	C	1	0	1
International Journal of Management	C	0	1	1
International Journal of Managing Projects in Business	C	0	1	1
International Journal of Organizational Theory and Behavior	C	1	0	1
International Journal of Revenue Management	C	0	2	2
International Journal of Technoentrepreneurship	C	1	0	1
International Review on Public and Nonprofit Marketing	C	0	1	1
Journal for Advancement of Marketing Education (JAME)	C	1	0	1
Journal of Accountancy	C	2	0	2
Journal of Applied Business and Economics	C	0	1	1
Journal of Asia Business Studies	C	0	1	1
Journal of Business and Economics Research	C	0	2	2
Journal of Economics and Finance Education	C	0	1	1
Journal of Foodservice Business Research	C	0	1	1
Journal of Global Business Issues	C	1	0	1
Journal of International Management Studies	C	3	0	3

Journal of Marketing for Higher Education	C	0	1	1
Journal of Relationship Marketing	C	1	0	1
Journal of Research in Interactive Marketing	C	0	1	1
Journal of Small Business and Entrepreneurship	C	1	0	1
Journal of Teaching in Travel and Tourism	C	0	1	1
Journal of Transnational Management	C	1	0	1
Multinational Business Review	C	1	1	2
New Zealand Journal of Human Resources Management	C	0	2	2
Research in Finance	C	1	0	1
The Business Review, Cambridge	C	1	0	1
The International Journal of Management Education	C	0	1	1
Tourism, Culture and Communication	C	0	1	1
39 Western State University Law Review 281		0	1	1
Academy of Business Research Journal		0	1	1
Advances in Investment Analysis and Portfolio Management		1	0	1
African Journal of Business Management		1	0	1
AIS Transactions on Human-Computer Interaction		0	1	1
American Journal of Business Education		0	1	1
American Journal of Health Behavior		1	1	2
American Journal of Health-System Pharmacy		0	1	1
Annals of Wyoming		1	0	1
Asia Pacific Journal of Human Resource Management		0	1	1
Asian Business & Management		0	1	1
Business Renaissance Quarterly		2	2	4
California Journal Of Operations Management		1	0	1
Case Research Journal		0	2	2
China Media Research		0	1	1
Christianity and Literature		1	0	1
Community College Journal of Research & Practice		0	1	1
Computers & Education		0	1	1
Concentric: Literary and Cultural Studies		0	1	1
ConTexto		0	1	1

CPA Journal	1	0	1
CRC Press	0	1	1
Diplomacy Journal Korea	1	0	1
Economics Letters	0	1	1
Economy, Management and Development	0	1	1
Electoral Studies	0	1	1
European Journal of Training and Development	0	1	1
Financial Planning Magazine	1	0	1
Fisher College of Business Working Paper	0	1	1
Global Journal of Management & Business Research	0	1	1
Global Studies Journal	1	0	1
Graziadio Business Review	0	3	3
Groundwater	0	1	1
Human Resource Management Research	0	1	1
iBusiness	1	0	1
IEEE Intelligence Systems	1	0	1
IEEE Technology & Society	1	0	1
IMA Volume on Natural Locomotion in Fluids and on Surfaces: Swimming, Flying, and Sliding	0	1	1
Implicit Religion	2	1	3
Information System Journal	0	1	1
INFORMS Analytics	0	1	1
INFORMS Transactions on Education	3	0	3
Internal Auditing-Boston	0	1	1
International Business and Economics Research	1	0	1
International Journal of Accounting Information Science and Leadership	2	0	2
International Journal of Advanced Corporate Learning	1	0	1
International Journal of Applied Decision Sciences	1	0	1
International Journal of Community Music	1	0	1
International Journal of Cyber Ethics in Education (IJCEE)	0	1	1
International Journal of Humanities and Peace	1	0	1



International Journal of Information Technologies and the Systems Approach	1	1	2
International Journal of Non-Linear Mechanics	0	1	1
International Journal of Organisational Design and Engineering	1	0	1
International Journal of Stress Management	0	1	1
International Journal of Sustainable Human Security	0	1	1
International Journal of Teaching and Learning in Higher Education	0	1	1
Ivey Business Journal	1	0	1
Jesuit Higher Education: A Journal	0	3	3
Journal of Accounting Information Science & Leadership	2	0	2
Journal of Advanced Corporate Learning	1	0	1
Journal of American Studies	1	0	1
Journal of Applied Business Research	1	0	1
Journal of Brand Strategy	0	1	1
Journal of Business Case Studies	1	0	1
Journal of Business Cases and Applications	0	1	1
Journal of Catholic Higher Education	1	0	1
Journal of Cleaner Production	1	0	1
Journal of Clinical Psychology	0	1	1
Journal of Commercial Biotechnology	0	2	2
Journal of Communication and Religion	0	1	1
Journal of Concurrency and Computation: Practice and Experience	0	1	1
Journal of Derivatives & Hedge Funds	1	1	2
Journal of Entrepreneurship and Organization Management	0	2	2
Journal of Excellence in Business Education	0	1	1
Journal of Experimental Psychology: General	0	1	1
Journal of Finance & Investment Analysis	0	1	1
Journal of Health and Human Services Administration.	0	1	1
Journal of Hospitality and Tourism Case Studies	0	1	1
Journal of Hospitality Marketing & Management	0	1	1
Journal of Human Resource Management	0	1	1
Journal of Information Technology Education: Innovations in Practice	0	1	1

Journal of Intercultural Communication Research	0	1	1
Journal of Jesuit Business Education	0	1	1
Journal of Law, Business & Ethics	0	1	1
Journal of Legal, Ethical and Regulatory Issues	0	3	3
Journal of Mathematical Finance	0	1	1
Journal of Media and Religion	0	1	1
Journal of Media Education	0	1	1
Journal of Nonprofit and Voluntary Sector Marketing	0	1	1
Journal of North American Management Society	1	0	1
Journal of Operations and Supply Chain Management	1	0	1
Journal of Personal Finance	0	1	1
Journal of Professional Nursing	1	0	1
Journal of Public Affairs Education	0	3	3
Journal of Public Management and Social Policy	0	2	2
Journal of Quantitative Analysis in Sports	2	2	4
Journal of School Choice	0	1	1
Journal of Sex Research	0	1	1
Journal of the American Academy of Religion	0	2	2
Journal of the Centre for the Study of Implicit Religion and Contemporary Spirituality	1	0	1
Journal on Applied Mathematics	0	1	1
Justice Policy Journal	0	1	1
Law Review, Bahcesehir University	0	1	1
Leadership and the Humanities	0	1	1
Learning Technology IEEE Computer Society	1	0	1
Macroeconomics and Finance in Emerging Market Economies	0	1	1
Manufacturing and Services Operations Management	0	1	1
Mathematical Models & Methods in Applied Sciences	0	1	1
Medical Physics	0	1	1
Midwest Law Journal	1	0	1
MIS Review	1	0	1
National Association of Student Affairs Professionals Journal	0	1	1

Netmob 2013	0	1	1
New Directions for Community Colleges	0	1	1
North Korean Review	1	0	1
Organizational Management Journal	0	1	1
ORMS Today	1	0	1
Pacific McGeorge Global Business and Development Law Journal	2	0	2
Physical Review E	3	2	5
Política y gobierno	1	0	1
Probability in the Engineering and Informational Sciences	1	0	1
Proceedings of the American Mathematical Society	1	0	1
Public Relations Journal	0	1	1
Research on Professional Responsibility and Ethics in Accounting	0	1	1
Service Science	0	1	1
Sinergie	1	0	1
Skyline Business Journal	0	1	1
Software Practice and Experience	1	0	1
Spaces and Flows: An International Journal of Urban and ExtraUrban Studies	0	1	1
Spring Series on Agent-Based Social Systems: Agent-Based Approaches in Economic and Social Complex Systems	1	0	1
Stanford Social Innovation Review	0	1	1
Sustainability	0	1	1
Symposia on Race, Gender, and Philosophy	1	0	1
Tamara Journal for Critical Organization Inquiry	0	1	1
Teaching Public Administration	0	1	1
Teaching Public Relations	0	1	1
Technology Transfer and Entrepreneurship	0	1	1
Texas Law Review	0	1	1
The American Economist Journal	0	1	1
The American Journal of Drug and Alcohol Abuse	1	0	1
The Business Journal of Hispanic Research	1	0	1
The Coastal Business Journal	0	1	1

The Copperfield Review	1	0	1
The International Journal of Aging and Society	0	1	1
The International Journal of Health, Wellness and Society	0	2	2
The International Journal of Sustainability Policy and Practices	0	1	1
The Journal of Global Business Issues	1	0	1
The Journal of Global Business Management	1	0	1
The Oxford Handbook of Venture Capital	0	1	1
The Quarterly Journal of Economics Alternative	0	1	1
Today's CPA	1	0	1
United States Association for Small Business and Entrepreneurship	1	0	1
University of Minnesota Law Review	0	1	1
Western Journal of Human Resource Management	0	1	1
World Economics Journal	1	0	1
Grand Total	162	283	445

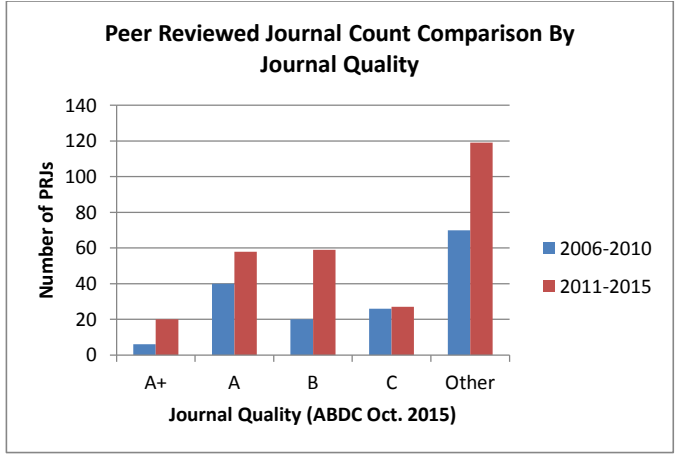
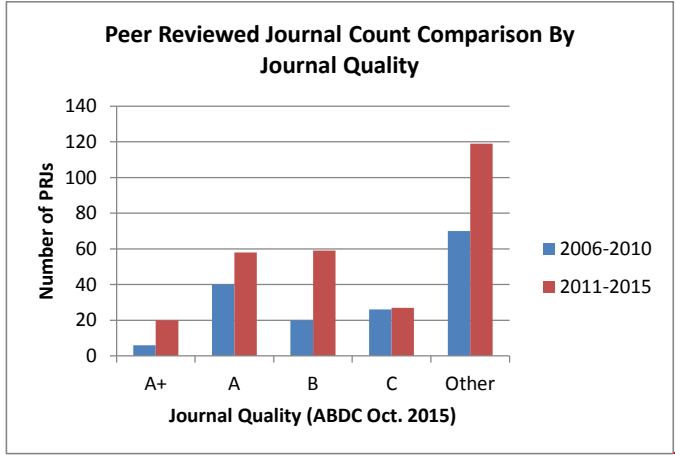
\* Australian Business Deans Council journal Quality List. Last updated Sept. 29 2015

\*\* Does not include publications by faculty hired after 2010

\*\*\* Published PRJs recorded in Digital Measures as of Oct. 15, 2015

#### Journal Quality Totals

Journal Rating (ABDC)*	2006-2010	2011-2015	Total	% Change
A+	6	20	26	233%
A	40	58	98	45%
B	20	59	79	195%
C	26	27	53	4%
Other	70	119	189	70%
Total	162	283	445	75%



USF School of Management

**Peer Reviewed Journal Citation Totals**

Published between January 1, 2010 - October 9, 2015

	Professor	Publications	Total Citations
1	Richard David Waters	61	851
2	Steven Lewis Alter	23	308
3	Michelle Millar	12	229
4	Sun-Young Park	12	208
5	Anthony Dominick Patino	12	107
6	Monika Lynne Hudson	10	104
7	Jonathan P Allen	7	93
8	Robert N Mefford	5	74
9	Liang Wang	4	61
10	Roger (Rongxin) Chen	6	51
11	Elizabeth B. Davis	8	49
12	Zachary Burns	3	49
13	Vijay Mehrotra	5	45
14	Xiaohua Yang	18	44
15	Ludwig Boris Chincarini	7	37
16	Thomas A. Maier	11	37
17	Michael Dwain Collins	6	32
18	Matthew J. Monnot	4	32
19	Richard Gregory Johnson III	15	31
20	Sweta Chaturvedi Thota	6	25
21	Marco Tavanti	16	23
22	Richard W Stackman	3	22
23	Linda S Henderson	2	22
24	Kevin David Lo	7	21
25	Jennifer Parlamis	6	19

26	Richard F Callahan	8	17
27	Joel Lee Oberstone	3	17
28	Nicholas Sze-Poh Tay	5	16
29	Nicholas J Imparato	3	13
30	Cathy S Goldberg	2	11
31	Todd L Sayre	3	11
32	John Miller Veitch	1	11
33	Kathleen R Kane	4	10
34	Eun Kyung Lee	3	10
35	Thomas A Grossman	3	10
37	Rebekah Dibble	2	10
38	Larry Brewster	3	8
39	Jonathan D Barsky	2	7
40	Leslie Ann Goldgehn	3	6
41	Sonja Martin Poole	3	6
42	Mark Vincent Cannice	4	6
43	Nicholas Ross	1	6
44	Neil Diarmuid Walshe	2	5
45	Moirra Anne Gunn	3	4
46	Catherine Horiuchi	1	4
47	Diane H Roberts	4	3
48	Paul V Lorton Jr	3	3
49	Ricardo Villarreal	5	3
50	Barry W Doyle	2	3
51	Ivan Oscar Asensio	1	3
52	Muhammad Al-Abdullah	2	3
53	John Peter Koeplin	3	2
54	Kimberly Rae Connor	8	1
55	Ronald Alan Harris	5	1
56	Karl A Boedecker	3	1
57	Manuel J Tarrazo	4	0
58	Carol M Graham	3	0

59	Stephen J Huxley	2	0
60	Gleb O Nikitenko	2	0
62	W Michael Becker	1	0
63	Daniel Blakley	1	0
64	Fernando Comiran	1	0
65	Joohyung Ha	1	0
66	Keith O Hunter	1	0
67	Peggy K Takahashi	1	0
<hr/>			
Total		381	2785

## APPENDIX 14

### Alumni, Career Development, and External Events, 2015





## Alumni, Career Development, and External Events, 2014-2015

Date	Event	Speakers	Region	Type	TOTAL ATTENDED	Alu mni	Student	Friend	Prosp ective	Staff	Facult y	TOTAL RSVP	Alu mni	Student	Friend	Prospective	Staf f	Facult y
9/12/14	Dean's Downtown Campus Open House		San Francisco	Networking Mixer	157	25	72	17	3	26	14	300	70	86	10	8	38	22
10/3/14	A Night At The Movies: What Is Philanthropy Film Screening at Delancey Street Foundation	Guest Professor Salvatore Alaimo, PhD; Introductions by Dean Elizabeth B. Davis, Rich Callahan and Marco Tavanti	San Francisco	Lecture/Speaker	74	22	3	40	0	7	1	175	43	24	89	4	7	5
10/26/14	Forbes & Finance in the Silicon Valley	Professor Ludwig Chincarini; Luis Alvarado USF Alumnus	South Bay	Lecture/Speaker	36	10	10	9	2	4	1	62	16	14	20	6	5	1
10/27/14	Double Your Network - USD & USF		San Diego	Networking Mixer	3	1	N/A	0	0	2	N/A	3	1	N/A	0	0	2	N/A
11/8/14	Intro to Google Analytics 1- Day Workshop	Andy Buteau, Adjunct Professor	San Francisco	Professional Development	82	23	31	17	11	6	N/A	105	26	43	18	18	N/ A	N/A
11/19/14	The Strategy of Apple: Past, Present and Future	Guest Professor Alejandro Ruelas-Gossi	San Francisco	Lecture/Speaker	71	8	37	12	5	7	2	155	22	66	34	24	7	2
12/4/14	SOM Alumni/Stud ent Holiday Party		San Francisco	Networking Mixer	187	79	45	37	N/A	20	6	286	132	94	22	N/A	27	10
1/16/15	How To Manage A Million - USF Lunch and Learn	Professor Ludwig Chincarini	San Francisco	Lecture/Speaker	21	8	0	1	7	4	0	61	18	0	13	25	4	0

1/16/15	USF Dubai Alumni Reception	Professor Mouwafac Sidaoui; MBA Students	Dubai	Lecture/Speaker	27	2	21	2	1	N/A	1	43	8	21	13	0	N/A	1
1/26/15	Santa Monica Alumni Dinner at Rustic Canyon		Los Angeles	Networking Mixer	8	3	N/A	3	N/A	2	N/A	12	7	N/A	3	N/A	2	N/A
1/27/15	La Jolla Alumni Lunch		San Diego	Networking Mixer	9	4	N/A	3	0	2	N/A	9	3	N/A	3	0	2	N/A
1/28/15	Big Data and Personalized Marketing	Nick Gorski - Tech Lead, TellApart Jason Gattoff - Head of Marketing, TellApart Sherwin Baghai - Account Executive, TellApart Moderated by Professor Yannet Interian	San Francisco	Lecture/Speaker	93	21	27	21	16	6	2	232	48	73	65	37	6	3
1/29/15	New Year New Dean - San Jose	Dean Elizabeth B. Davis. Intro by USF Alumna Joanne Escobar	South Bay	Lecture/Speaker	41	12	4	4	1	11	9	57	23	8	4	1	11	10
2/2/15	New Year New Dean - Pleasanton	Dean Elizabeth B. Davis. Intro by USF Alumnus Rob Volpentest	East Bay	Lecture/Speaker	36	15	1	3	1	10	7	49	26	1	3	1	10	8
2/5/15	DC Alumni Lunch		Washington DC	Networking Mixer	0	0	0	0	0	0	0	0	1	0	0	0	0	0
2/11/15	Miami Alumni Mixer		Miami	Networking Mixer	7	2	N/A	2	0	3	N/A	11	4	N/A	4	0	3	N/A
2/11/15	New York Alumni Reception		New York	Networking Mixer	14	6	N/A	6	0	2	N/A	21	10	N/A	9	0	2	N/A
2/14/15	Experience Tesla at	Steve Page - President of Sonoma	North Bay	Lecture/Speaker	127	31	1	85	N/A	9	4	145	38	2	89	N/A	9	5

	Sonoma Raceway	Raceway; Tom Malloy - Board of Trustees;																
2/18/15	New Year New Dean - Sacramento	Dean Elizabeth B. Davis, Intro by USF Alumna Rosanna Castain	Sacramento	Lecture/Speaker	50	15	4	7	3	13	8	66	23	6	9	6	13	9
4/1/15	The Personal Journey of Anne Kronenberg	Anne Kronenberg MPA Alumna; Intro by Rich Callahan	San Francisco	Lecture/Speaker	61	5	22	17	5	6	6	134	16	48	37	18	7	8
4/6/15	Behind The Scenes at Kiva	Jonny Price, Senior Director of Kiva Zip	San Francisco	Lecture/Speaker	63	11	7	33	3	6	3	118	26	25	49	5	9	4
4/15/15	Bankers, Beer and Brats - USF Finance Mixer		San Francisco	Networking Mixer	53	13	19	11	1	7	2	95	31	32	17	1	9	5
4/22/15	Ethics in Management	Professor Neil Walshe	San Francisco	Lecture/Speaker	49	11	20	6	2	6	4	101	33	38	14	5	6	5
4/23/15	The Future of Tech Jobs - An Insider's Perspective	Yolanda Stanton, HR Manager @ LinkedIn Kathryn Ullrich, Principal of Heidrick & Struggles' Tech Practice Tyson Bennett, Director of Daversa Partners David Madden, Executive Vice President at DHR International's IoT Practice	San Francisco	Professional Development	32	10	8	9	2	3	0	58	26		23	5	4	0
5/6/15	Confessions of Angel Investing	Professor Vijay Mehrotra Shawn Merani, Partner at	San Francisco	Lecture/Speaker	112	30	43	26	6	6	1	247	64	67	80	25	7	4

		Flight VC and Penchina Syndicate																
5/7/15	Experience Salesforce	Rob Lamb, Director Customer Evangelism @ Salesforce	San Francisco	Professional Development	80	23	36	6	3	10	2	147	55	55	14	7	13	3
5/18/15	MGEM Reception		San Francisco	Networking Mixer														
6/23/15	Alumni Giants Baseball Game Mixer		San Francisco	Networking Mixer	44	27	N/A	8	N/A	5	4	49	32	N/A	8	N/A	5	4
7/15/15	MPA Evening with Frank Jordan	Frank Jordan, Former Major and USF Alumnus	San Francisco	Lecture/Speaker	18	3	2	N/A	5	7	1	21	5	2	N/A	6	7	1
7/16/15	Change The World Through Code - 26th Annual North Bay Speaker Series	Sabeen Ali, MSOD Alumna, Founder & CEO at AngelHack	North Bay	Lecture/Speaker	37	19	2	7	0	8	1	73	37	12	11	0	9	4
7/28/15	Behind The Scenes at the Gates Foundation	Greg Siegler, Former Professor; Susi Collins, MNA Alumna, Jennifer Hanson	Seattle	Lecture/Speaker	141	61	10	48	11	8	3	193	85	15	65	15	8	5
8/19/15	FinCon Bay Area Meetup with Alumnus	Bobby Lee, Finance Alumnus	San Francisco	Networking Mixer	5	1	3	1	0	N/A	N/A							
9/11/15	Salesforce Social Studio 101 2-Day Workshop	Instructor Sherry Keezer	San Francisco	Professional Development	28	11	17	N/A	N/A	N/A	N/A	32	13	19	N/A	N/A	N/A	N/A
9/28/15	Introduction to Tableau	Jason Schumacher & Megan Corbett - Tableau Academic Program	San Francisco	Professional Development	50	6	35	1	0	7	1	129	24	81	6	6	10	2

		Intro by Professor Mouwafac Sidaoui																
10/5/15	The Evolution of the Finance Industry and Emerging Opportunities	Jim McCool, Executive Vice President - Charles Schwab Tim Kochis, USF Trustee, CEO - Kochis Global Moderated by Professor Ludwig Chincarini, PhD	San Francisco	Lecture/Speaker	0						0							
10/14/15	Start-ups and How They Create A Thriving Culture at Lyft HQ	Claire Hughes Johnson, COO at Stripe Mike Joyner, People Ops Manager at Pinterest Ron Storn, USF Alumnus, VP of People at Lyft	San Francisco	Lecture/Speaker														
10/22/15	United Nations Speaker Event	Alfredo Sfeir Younis, PhD, Economist Ron Nahser, PhD, Senior Wicklander Fellow at the Institute for Business and Professional Ethics and Provost Emeritus of Presidio School of Management	San Francisco	Lecture/Speaker														
11/5/15	GREEN is the New Black - Conscious Leaders Sustainability Panel	Patrick Brown, Founder & CEO of Impossible Foods Mike Sangiaco, President &	San Francisco	Lecture/Speaker														

		CEO Alexander Von Welczeck, CEO, SkyH20																
11/10/15	LinkedIn Rock Your Profile Alumni Mixer	NYC Alumni Panel	New York City	Lecture/Speaker														
11/18/15	Change The World From Oakland	Wes Selke, Adjunct Professor; Ari Takata- Vasquez, USF Alumna	East Bay	Lecture/Speaker														
12/11/15	SOM Alumni/Stu- dent Holiday Party		San Francisco	Networking Mixer														

**APPENDIX 15**

**Strategic Funding Priorities**





### Priorities

*What are the top priorities for your school/unit in this campaign? Please list up to five specific investments you would make to build and advance your programs, as well as to provide faculty and student support.*

1) Centers and Programs	2) Scholarships	3) Research funding for students and faculty	4) Experiential Learning Initiatives	5) Industry Engagement
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### Descriptions

*For each priority, please describe in more detail the desired outcomes, the particular investments planned (the "how"), and the ultimate impact on both students and the world.*

<b>Priority 1 New Centers and Programs</b>	<b>Outcomes:</b> <i>What outcomes will you achieve with additional investment? What will be different after the campaign?</i>
	<p><b>Professional Edge Program</b></p> <p>Professional Edge is a four-year co-curricular program to provide business majors the practical skills and knowledge to make a successful transition from student to working professional in today's competitive business world. Beginning freshman year, students will participate in workshops and activities that will develop their marketable skill sets, provide unique opportunities for professional growth and development, and enhance their capability to secure valuable internships and career options upon graduation.</p> <p>In addition to the above structures and workshops, Professional Edge would offer supplemental programming that would highlight USF's Ignatian foundation with a series of reflective sessions called The Ignatian Management Exercises. These reflection sessions would be led by faculty and administrators with experience in Ignatian spirituality and pedagogy where students of all class levels will be posed with a question in management/business to reflect on critically and analyze within the Ignatian spiritual foundation.</p> <p>The Professional Edge Program prepares students to:</p> <ul style="list-style-type: none"> <li>• Transition as a professional into the business world;</li> <li>• Integrate theory with practice by connecting relevant experience with academic knowledge;</li> <li>• Communicate and engage effectively in business settings;</li> <li>• Utilize emerging technologies; and</li> <li>• Collaborate within a diverse workforce to meet the challenges of 21st Century businesses.</li> </ul>

**Center for Social Impact (CSI)**

The CSI's main objective is to become a catalyst for University-community collaborative projects where SOM curricula, faculty, staff, students, and alumni can find the institutionalized hub for promoting and coordinating social impact programs. Such programs need the coordination and mediation of a center to guarantee the dialogues across class-based projects and graduate programs (MNA, MPA, MBA, MSOD, etc.) with community based projects of selected partnering organizations aligned with the USF mission of social justice and the SOM strategic priorities for social impact and social innovation.

**Center for Conscious Leadership & Social Innovation (CCLSI):** The recent *Harari- Davis Grant*. Recently, a key donor has recognized SOM's expertise in social innovation, resulting in a \$1mm grant by the Harari-Davis Foundation. This grant is to be used to create a social business competition, a leadership forum, and a social entrepreneur in residence program. Expansion of this effort would allow for the establishment of research, educational programming aimed at leadership development in conscious capitalism, applied ethics and social responsibility in the business sector. This expansion of the grant will allow for additional leadership development for graduate students interested in studying these issues.

**SOM Incubator /Accelerator:** Partnerships would be established to provide hands-on experiences for graduate and undergraduate students interested in the entrepreneurship activity. This focus of partnerships would provide a foundation for students, faculty and staff to work with individual entrepreneurs in the field through dialogue opportunities, lectures, and consultation to help budding entrepreneurs with realizing their business plans and ideas. As of now there are several partners that have expressed interest:

**Impact Hub** (they would register all center members also as Hub members and handle the back – office of doing so; they would co-host two to four events a year @ USF's downtown campus, with only a shared cost for catering (no rental fee incurred); USF would get sponsorship level pricing and discounts for twenty of its students to SoCap).

**Kiva** (most likely Kiva Zip) would like to partner on engaging student interns to help with deal sourcing and due diligence of Kiva Zip projects.

**Angelhack** has proposed partnering on providing curriculum development for social startups.

**Just Business** has suggested having interns also channeled to their incubation center for further work in the social sector.

**CAPE Program:** Santa Clara University Partnership: partnering with the Santa Clara Business School on their entrepreneurship short –term program to be offered in South San Francisco. Both graduate and undergraduate students can attend for non-academic credit.

**Malloy Group: Graduate Student Experience in Organizational Work:**

Establish a student governed experiential structure to provide hands-on experience in solving real-world business and organizational problems. These students would be required to attend a series of workshops on consulting in organizations. Organizational problems would be vetted by a faculty board of overseers who would guide the consulting projects of students. Students could apply for credit or non-credit work in this structure.

	<p><b>New Graduate Programs:</b></p> <p>Capitalize on the strengths of the SOM to expand the current offerings to graduate students by creating new Master's programs in the following areas:</p> <p><b>Entrepreneurship;</b> (scheduled to launch in Fall 2016) additional programs under review for feasibility include: Accounting; Marketing Research &amp; Data Insights</p> <p><b>Executive education -Silicon Valley Immersion</b></p> <p><b>Certificate Programs: (credentialing short-term non-degree programs) internal Audit; Women's Leadership; Event Planning</b></p> <p><i><b>Plans:</b> What investments or activities, made possible by donor support, will advance you toward this end? Please provide as much detail as is reasonable at this stage.</i></p> <p><b>Professional Edge Program</b></p> <ul style="list-style-type: none"> <li>• Funding for workshops that enhance students competitiveness in the workforce</li> <li>• Support for conferences/symposia, speaker series and seminars that develop students competencies in leadership, technology, time management and other relevant topics.</li> <li>• Support for new staff: Assistant Director for Student Professional Development, Manager for Internships and Professional Experience, Manager for Student Engagement and Assessment, Program Assistant IV</li> <li>• Sponsor students to participate in technology certifications</li> </ul> <p><b>Center for Social Impact</b></p> <ul style="list-style-type: none"> <li>• Naming opportunity to endow the Center and ensure the longevity of the program</li> <li>• Sponsorship of a Faculty Director and Associate Director</li> <li>• Funding for research assistants (CSI Associates)</li> <li>• Grants to support students community based projects</li> </ul> <p><b>Center for Conscious Leadership &amp; Social Innovation:</b></p> <ul style="list-style-type: none"> <li>• Naming opportunity to endow the Center and ensure the longevity of the program</li> <li>• Sponsorship of a Faculty Director and Associate Director</li> <li>• Funding for research assistants (CSI Associates)</li> <li>• Grants to support students community based projects</li> <li>• Sponsorship of speaker series</li> <li>• Sponsorship of Research Fellows and Visiting Scholars</li> <li>• Executives in Residence Programs</li> </ul> <p><b>SOM Incubator/Accelerator:</b></p> <ul style="list-style-type: none"> <li>• Naming opportunity to endow the Center and ensure the longevity of the program</li> <li>• Sponsorship of a Faculty Director and Associate Director</li> <li>• Funding for research assistants (SOM I/A Assistants)</li> <li>• Grants to support students community based projects</li> </ul> <p><b>Malloy Group:</b> Graduate Student Experience in Organizational Work:</p> <ul style="list-style-type: none"> <li>• Naming opportunity to endow the Group and ensure the longevity of the program</li> <li>• Sponsorship of a Faculty Director and Associate Director</li> </ul>
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- Support for a Faculty Board of Overseers
- Funding for research assistants (Malloy Group Associates)
- Grants to support students community based projects

**China Business Study Center: Educating Globally Responsible Leaders**

- Naming opportunity to endow the Center and ensure the longevity of the program
- Sponsorship of a Faculty Director and Associate Director
- Funding for research assistants – Grants/fellowships to support students' research based projects focusing on international business; cross-cultural dynamics; trade; diplomacy and market development.
- Immersion study tours: opportunity to sponsor immersion trips focused on international business and trade.

**Impact:** *How will these investments impact students and/or faculty? How will they impact San Francisco and/or other communities that USF graduates go on to touch?*

**Professional Edge Program:**

The Professional Edge Program supports the School of Management's mission to "educate students to build more productive and compassionate organizations" by providing the tools to thrive in a professional setting, both corporate and nonprofit, while utilizing the "entrepreneurial energy of our region." The School's values of "personal responsibility and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit" are all reinforced by the skills practiced in the Professional Edge Learning Experiences.

All these programs/ centers bundled will raise the level, image and prominence of the School of Management.

**Center for Conscious Leadership & Social Innovation**

**SOM Incubator/Accelerator:**

**Malloy Group**

**China Business Study Center: Educating Globally Responsible Leaders**

By working across the Curriculum in our areas of competence: Conscious Leadership; Innovation Mindset and Data Insights we develop our capabilities and capacity to differentiate ourselves in the local marketplace.

**Center for Social Impact**

- CSI elevates USF's reputation as a hub of academic-community cooperation through competent engagement, teaching, research and service for social impact.
- CSI leverages SOM's ability to educate the private, public and non-profit sector by promoting social value creation through cross-sector and interdisciplinary collaborations.
- CSI could be instrumental in breaking the silo effect of academic units while elevating the profile of the University and maximizing its social returns.
- Ultimately, CSI will be a catalyst in building capacity for social impact while educating socially responsible, socially engaged, conscious leaders.

**New Graduate Programs**

	Expanding our course offerings and focusing on the high achieving programs will give graduates of the School of Management the opportunity to become leaders in industry in the Bay Area and around the world.
<b>Priority 2</b> <b>Scholarships</b>	<p><b>Outcomes:</b> <i>What outcomes will you achieve with additional investment? What will be different after the campaign?</i></p> <p>Scholarships enable the School of Management to continue to attract top caliber students in an increasingly competitive business school environment regardless of their financial situation. Scholarships ensure that the School of Management remains accessible to all regardless of their background.</p> <p><b>Plans:</b> <i>What investments or activities, made possible by donor support, will advance you toward this end? Please provide as much detail as is reasonable at this stage.</i></p> <p><b>SOM Dean's Undergraduate and Graduate Scholarships</b></p> <p>Scholarships will be awarded to students who show academic excellence and need financial support in the following programs:</p> <ul style="list-style-type: none"> <li>• B.S.M</li> <li>• MSFA</li> <li>• MSOD</li> <li>• MPA</li> <li>• MBA</li> <li>• MGEM</li> <li>• MNA</li> </ul> <p><b>Impact:</b> <i>How will these investments impact students and/or faculty? How will they impact San Francisco and/or other communities that USF graduates go on to touch?</i></p> <p>School of Management scholarship recipients contribute to the professional achievement of their class and provide the foundation on which the school's rankings and reputation are built.</p>
<b>Priority 3</b> <b>Research funding for students and faculty</b>	<p><b>Outcomes:</b> <i>What outcomes will you achieve with additional investment? What will be different after the campaign?</i></p> <p>Research from our prominent faculty and students has a powerful impact on management practices and increases the notoriety of the school. Critical funds can support cutting-edge faculty research projects or enable students to conduct community or industry engaged research.</p> <p><b>Plans:</b> <i>What investments or activities, made possible by donor support, will advance you toward this end? Please provide as much detail as is reasonable at this stage.</i></p> <p><b>Endowed Chairs</b></p> <p>By establishing an endowment for the following professorships, the SOM can attract top faculty that will enhance the school's academic programs. The school has interest in endowing the following chairs: Technology; Data; Marketing; Management; Finance</p> <p><b>SOM Faculty and Student Research Fund</b></p>

<p><b>Priority 4</b></p> <p><b>Experiential Learning Initiatives</b></p>	<p>Research funds are vital to strengthening key departments and disciplines at USF, providing the resources needed to advance work of distinction and promise. Such endowments can bridge gaps in the funding of established researchers and help junior faculty members and graduate students to explore their own original ideas and research methods.</p>
	<p><b>Impact:</b> <i>How will these investments impact students and/or faculty? How will they impact San Francisco and/or other communities that USF graduates go on to touch?</i></p>
	<p>By promoting top academic scholarship, the SOM can enhance their competitiveness in the business school marketplace and be an academic partner to industry.</p>
	<p><b>Outcomes:</b> <i>What outcomes will you achieve with additional investment? What will be different after the campaign?</i></p>
	<p>Students will have access to exceptional learning opportunities that will solidify their skills and knowledge beyond the classroom environment. Experiential learning helps bridge the gap between theory and practice and prepares students to compete for career opportunities upon graduation.</p> <p><b>Plans:</b> <i>What investments or activities, made possible by donor support, will advance you toward this end? Please provide as much detail as is reasonable at this stage.</i></p> <p><b>Academic Global Immersion</b></p> <p>Academic Global Immersions offer an experience-based course that prepares students for leadership roles where they will engage with people and institutions around the globe. By traveling abroad and participating in projects, students will enhance their entrepreneurial experiences and prepare to operate in a more just world of cultural understanding.</p> <p><b>SOM Student Fellowships</b></p> <p>Students who earn fellowships will put their management skills to work while developing their own entrepreneurial ideas in such areas as finance, nonprofit management, and small business consulting. By funding this initiative, students will work with SOM partners such as Kiva, Impact Hub, Good food for Good and other industry leaders.</p> <p><b>SOM Student Managed Fund</b></p> <p>The SOM Student Managed Fund (SMF) allows selected second year MSFA candidates to invest real money in the stock and bond markets. The faculty-supervised group engages in all aspects of portfolio management, investment analysis, asset allocation, and trading strategies, as would a professional management team. Students are responsible for all administrative details of managing the fund and also conducts research projects with selected companies.</p> <p><b>Bloomberg Terminals</b></p> <p>The Bloomberg Terminal is the premier financial analysis tool to access real-time information for any publicly traded company. More than just Finance majors can utilize Bloomberg, as the technology provides current and historical access to every major news organization, government agency and corporation. Having this technology on campus provides a real opportunity for students because recruiters are seeking graduates who are familiar with technologies they will be using in the workplace.</p> <p><b>SOM Incubator/Accelerator</b></p> <p>The School of Management will be launching a SOM Incubator/Accelerator in partnership with Impact Hub. A school incubator can connect budding entrepreneurs with experienced</p>

<p><b>Priority 5</b></p> <p><b>Industry Engagement</b></p>	<p>professionals who advise on creating new technology, marketing, funding and other kinds of sources. Incubators provide the space for local entrepreneurs to collaborate with School of Management students who are excited to launch a new venture.</p> <p><b>Harari Conscious Leadership and Social Innovation Initiative</b></p> <p>SOM has been provided a lead gift to start several initiatives to honor the legacy of SOM Professor Oren Harari. Additional funds towards the program will help off-set the university expenses towards these efforts:</p> <ul style="list-style-type: none"> <li>• Conscious Leadership and Social Innovation Executive-in-Residence Program</li> <li>• Conscious Leadership and Social Innovation Symposium and Student Venture Fund Initiative</li> </ul>
	<p><b>Impact:</b> <i>How will these investments impact students and/or faculty? How will they impact San Francisco and/or other communities that USF graduates go on to touch?</i></p>
	<p>By enhancing the student experience with purposeful engagement and preparation for the workplace, students will have higher job acceptance rates, increased recruitment from top employers and improve SOM rankings.</p>
	<p><b>Outcomes:</b> <i>What outcomes will you achieve with additional investment? What will be different after the campaign?</i></p>
	<p>By inviting industry into the classroom, students will have access to the most relevant topics in management and be inspired by thought leaders in public, private and social impact sectors.</p>
	<p><b>Plans:</b> <i>What investments or activities, made possible by donor support, will advance you toward this end? Please provide as much detail as is reasonable at this stage.</i></p> <p><b>School of Management Fellows</b></p> <p>The School of Management Fellows program integrates senior executives into the life of the School. Current executives can support the University in a variety of ways through one-on-one counseling sessions in which executives advise students on their prospective career choices, teach classes, participate in student-run conferences, and organize informal lunches for groups of students with common interests, among many other activities.</p> <p><b>Dean's Speaker Series</b></p> <p>The Dean's Speaker Series brings distinguished individuals from around the world, who are leaders in their fields of business, government and social sectors, to share their views on global responsibility, entrepreneurship and data insights.</p> <p><b>China Business Studies Initiative (CBSI)</b></p> <p>CBSI is a platform for collaboration with the influential China business community in San Francisco. The initiative brings China business leaders, public policy makers, and academics to the larger San Francisco community through high impact research, resources and development programs.</p> <p><b>Impact:</b> <i>How will these investments impact students and/or faculty? How will they impact San Francisco and/or other communities that USF graduates go on to touch?</i></p> <p>The SOM will be seen as a convener of conversation on the latest topics and trends in business, entrepreneurship, global responsibility and innovation.</p>

### Vision and Credentialing

**School/Unit Vision:** At a high level, what are your aspirations for the years ahead? What will your school/unit be like after this campaign? Please provide a brief vision statement for your school/unit, considering how these priorities, taken together, might transform your work.

**Connection to University Vision:** What will this vision mean for the University as a whole? How will it advance USF's mission in San Francisco and beyond?

**Credentialing:** Why is your school/unit positioned to achieve this vision and realize these priorities? What strengths will this campaign build on?



**APPENDIX 16**

**Silicon Valley Venture Capital Index**

## Silicon Valley Venture Capitalist Confidence Index □ Quarterly Research Report

By: Mark Cannice, Ph.D., Professor and Department Chair for Entrepreneurship and Innovation with the USF School of Management

### Summary of Relevance, Impact and Coverage

**Relevance:** The Silicon Valley Venture Capitalist Confidence Index □ Research Report is the only quarterly report of its kind that captures trend data of future-oriented VC confidence. It is based on an on-going quarterly survey of about 30 VCs each quarter and includes their estimation of confidence in the future entrepreneurial environment as well as their commentary to support their assessment. The report features 11 years of exclusive quarterly historical data. In related peer-reviewed academic research the Index has shown to be somewhat predictive of venture-backed IPOs (one quarter ahead) and acquisitions (two quarters ahead)<sup>1</sup>. Related research showed some association with investments.<sup>2</sup> Perhaps more interesting, the commentary by responding VCs in each quarterly report tends to be very illustrative and has provided the base of an analysis of the VC industry<sup>3</sup>.

**Impact and Coverage:** A formal release is conducted each quarter for the Index Report.

On an on-going basis, the Index is carried by *Bloomberg Professional Services* (ticker: *SVVCCI*) on its subscription network in 174 countries (available for over 320,000 organizations).

It is also regularly cited in the international business press (a partial summary of major citations listed below).

*New York Times* (9 citations 2008 – 2014)

*Wall Street Journal* (12 citations 2006 – 2015)

*Economist* (2009 and 2010)

Xinhua News Service (China's national news – 2008/2009)

*San Jose Mercury News* (8 citations 2007 – 2011)

Voice of America (2 citations 2008 – 2009)

Fenwick and West, LLP (2008 – 2015)

*Investors Business Daily*

*USA Today* (2 citations 2008)

National Public Radio (2008, 2011)

*U.S. News and World Report* (2 citations 2008)

*Spiegel* (Germany's leading media outlet) (2009)

*San Francisco Chronicle* (8 citations 2005 – 2009)

Reuters (5 citations 2008 – 2013)

PricewaterhouseCoopers (*MoneyTree Report*)

*Los Angeles Times*

The name is a registered trademark and the reports are published by *EBSCO* and *ProQuest*.

For more information on the report or its author, please contact Mark Cannice at: Email:

[Cannice@usfca.edu](mailto:Cannice@usfca.edu) or Cell: 415.385.9591

<sup>1</sup> Cannice, Mark V., and Cathy Goldberg (2009). "Venture Capitalists' Confidence, Asymmetric Information, and Liquidity Events", *Journal of Small Business and Entrepreneurship* (Routledge) 22 (2), pp. 141-164.

<sup>2</sup> Cannice, Mark V. and Cathy Goldberg (2009). "Venture Capitalists' Confidence, Capital Commitments, and Capital Investments", *International Journal of Techno Entrepreneurship*. 2 (1) pp. 79 – 98, (Inderscience)

<sup>3</sup> Cannice, Mark V. and Arthur Bell. (2010). "Metaphors Used by Venture Capitalists: Darwinism, Architecture, and Myth", *Venture Capital: An International Journal of Entrepreneurial Finance*, (Routledge) 12 (1), pp. 1 – 20.

## Silicon Valley Venture Capitalist Confidence Index® (Bloomberg ticker symbol: SVVCCI)

**Second Quarter – 2015**  
(Release date: August 4, 2015)

**Mark V. Cannice, Ph.D.**  
*University of San Francisco*

The *Silicon Valley Venture Capitalist Confidence Index®* (Bloomberg ticker symbol: SVVCCI) is based on a recurring quarterly survey of San Francisco Bay Area/Silicon Valley venture capitalists. The *Index* measures and reports the opinions of professional venture capitalists on their estimations of the high-growth venture entrepreneurial environment in the San Francisco Bay Area over the next 6 - 18 months.<sup>1</sup> The *Silicon Valley Venture Capitalist Confidence Index®* for the second quarter of 2015, based on a June 2015 survey of 28 San Francisco Bay Area venture capitalists, registered **3.73 on a 5 point scale** (with 5 indicating high confidence and 1 indicating low confidence). This quarter's index measurement declined from the previous quarter's index reading of 3.81. Please see Graph 1 for trend data.



<sup>1</sup>Questions about this ongoing research study or related topics should be sent to Professor Mark Cannice at [Cannice@usfca.edu](mailto:Cannice@usfca.edu).

**Overall confidence declined again among the responding Silicon Valley venture capitalists in the second quarter of 2015.** While an expectation of a continued strong exit market – both IPOs and M&As – for venture-backed firms remained, along with an abiding confidence in the Silicon Valley ecosystem for new venture creation, increasing concern about high valuations of venture-backed firms restrained sentiment. Uncertainty over the entry of new types of investors, the rising cost of doing business in Silicon Valley, and the potential fallout of macro environment issues (e.g. China, E.U.) also gave pause to some venture investors.

The modest decline in confidence came amidst strong industry metrics in VC fundraising and investments, and exits of venture-backed firms. For example, the NVCA and Thomson Reuters reported the highest level of venture capital fund-raising since 2007.<sup>2</sup> Of course, the greater supply of funds available also makes possible the higher levels of valuations that give some venture capitalists pause. The NVCA and PWC also reported the highest level of venture investments since Q4 2000.<sup>3</sup> This wave of capital being put to work will certainly nourish new venture creation and innovation while also providing the demand that drives up valuations for the most promising projects. IPO activity for venture-backed firms in Q2 also increased significantly from the previous quarter but was down from the year earlier quarter<sup>4</sup>, signaling a healthy exit environment but one that is not operating at the same pace of VC fund-raising and investments.

Despite the overall strong venture business model metrics, the *Silicon Valley Venture Capitalist Confidence Index* edged lower in Q2 as it matched its 11-year average of 3.73, its lowest point in two years. As VC confidence tends to be forward-looking<sup>5</sup>, this disparity is not unusual, but suggests that additional consideration of potential future trends is warranted. In the following, I provide many of the comments of the participating venture capitalist respondents along with my analysis. Additionally, all of the Index respondents' names and firms are listed in Table 1, save those who provided their comments confidentially.

**Expectations that a continuing strong IPO and acquisition market for venture-backed firms will continue to drive up valuations encouraged some of the venture capitalists responding to the Q2 survey.** For instance, Igor M. Sill of Geneva Venture Management stated “I sense that continued new IPO activity and cash-rich treasuries at Amazon, Apple, Cisco, eBay, EMC, HP, Microsoft, Oracle, Salesforce will yield high valuation acquisitions of venture-backed startups. Shareholders are embracing acquisitions that promise greater market share and growth opportunities. Surprisingly, the stock prices of the acquiring companies have tended to appreciate even higher with smart acquisitions as evidenced by the volume of global M&A which surged to \$2 trillion for the year. The robust rebound of the US economy gives me confidence that the recovery will continue to lift venture’s positive momentum.”

Similarly, Sandy Miller of Institutional Venture Partners commented “After a surprisingly slow start, the IPO market for venture-backed tech companies has begun to accelerate. I think 2015 will finish strong and carry over in 2016.” Mr. Miller added “There are some amazing companies that have filed confidentially.” And Dixon Doll of DCM pointed to “widely available capital, attractive valuations for companies and teams, and a strongly positive liquidity environment” for his confidence while also noting a “frothy valuation environment.” Crediting macro-economic drivers, Tim Draper of DFJ reasoned “Low interest rates bring on high stock prices which lead to more wealthy people investing and more companies wanting to buy start-ups.”

<sup>2</sup> NVCA and Thomson Reuters press release dated July 8, 2015.

<sup>3</sup> NVCA and PWC press release dated July 17, 2015 (based on MoneyTree Report, Data: Thomson Reuters).

<sup>4</sup> NVCA and Thomson Reuters press release dated July 2, 2015.

<sup>5</sup> Cannice, Mark V., and Cathy Goldberg (2009). “Venture Capitalists’ Confidence, Asymmetric Information, and Liquidity Events”, *Journal of Small Business and Entrepreneurship* (Routledge) 22 (2), pp. 141-164.

**In addition to a strong exit environment, other fundamental trends are supporting the current venture environment.** Providing a detailed analysis, Paul Holland of Foundation Capital wrote “I have high confidence in continued growth in the venture entrepreneurial environment for three reasons.

1. For the first time in the history of Silicon Valley, the largest sources of growth are coming from entrepreneurs \*disrupting\* existing businesses (transportation, finance, food, media) versus creating new industries like lasers and semiconductors. These existing markets are several orders of magnitude larger than the original markets that formed the basis of growth in the early Silicon Valley. (See the documentary, ‘Something Ventured’, for more insight here.)
2. Upstream sources of funding (endowments, pensions, etc.) are flowing into large scale private companies at a record pace, providing ample resources for growth and product line as well as geographic extensions.
3. More and more extremely talented young people are forgoing jobs in large companies in favor of starting new businesses at a pace and scale unheard of in the history of the Silicon Valley. The stage is set for the continuation of one of the longest sustained periods of expansion in the Valley’s history.”

Emphasizing a portfolio approach to venture opportunities, Eric Buatois of Benhamou Global Ventures observed that “Innovation is very healthy in a lot of different sectors: biotech, cloud computing, cyber security, robotic, SAAS applications, Internet. If one sector cools down, the other sectors will remain very healthy given the loose correlation between customers and corporate investors across sectors.” To this point, in the life science arena, Tom McKinley of Cardinal Partners attributed his confidence to the fact that “digital health is coming of age” as well as recent life science exits like the Teledoc IPO. In fact, life science companies accounted for the majority of venture-backed IPOs in Q2.<sup>6</sup>

**Some venture capitalist respondents tempered their optimism, noting high valuations and some macro risks to the on-going momentum.** For example, Venky Ganesan of Menlo Ventures explained “The perfect storm of mobile, social and cloud still remains strong and augers well for the health of the tech eco-system long-term. Both seed stage and late stage venture is experiencing frothiness as the tourists have arrived and they are paying prices that the locals won’t. I expect a correction in the near term especially when the Fed raises interest rates, but the long-term picture remains very strong. It’s not software but rather Silicon Valley that is eating the world.” Additionally, John Malloy of BlueRun Ventures contended “The entrepreneurial fabric of Silicon Valley as the leading Technology Innovation Center worldwide remains strong.” Mr. Malloy continued, noting, however, some concern over valuation, primarily in the late stages of private equity that will eventually cause a drop in available financing overall. And Gerard van Hamel Platerink of Redmile Group maintained “There has rarely been a better time to raise money for private companies with the right profile. Deals are getting done quickly by a wide variety of investors, some quite new to the venture arena. Time will tell whether or not the deals done in 2015 will make investors the returns that they require to raise their next fund.”

*Pointing to macro and public market risks*, Bill Reichert of Garage Technology Ventures offered “I think the opportunities for innovation are better than ever, but the macro economy is looking more fragile these days, with Europe and China both signaling that all is not rosy. As much as we might wish otherwise, if the public markets retreat, it will hurt us. Time to make sure you have plenty of runway!” In fact, one other VC contributor blamed the “sluggish IPO market” for low confidence this quarter.

*Citing local ecosystem constraints*, Bob Bozeman of Eastlake Ventures relayed “The priceyness of opportunities seems to have slowed its ramp and the IPO queue seems prepared to provide some wins; however, talent competition and costs for doing business in Silicon Valley are continuing to push up the

<sup>6</sup> NVCA and Thomson Reuters press release dated July 2, 2015.

amount of investment required to successfully compete in Silicon Valley.” Meanwhile, Bob Ackerman of Allegis Capital shared “The unprecedented fund raising and valuations associated with so called ‘Unicorns’ and the knock-on effects for the venture ecosystem in terms of broader market expectations around valuations, compensation, and all aspects of the costs of doing business for venture companies gives reason for substantial pause. Expectations are beginning to outpace reality.” Likewise, a VC respondent who requested anonymity noted “The overall environment for innovation and growth remains positive - with downsides being the high cost of doing business in the Bay Area and inflated private valuations at all stages.”

Observing these trends, Dag Syrrist of Vision Capital concluded “The range of sectors in the economy that represents significant opportunities for improvements, whether from a cost, service or innovation standpoint has dramatically expanded as computing, storage and customer acquisition costs have come down. That said, not sure adding ‘tech’ to any area makes it venture financeable, but what’s more puzzling is how fewer start-ups are actually tackling hard problems with actual innovation and technology. Competing on round size and valuation metrics with no intrinsic value (other than intermediate LP reporting -- also is of little intrinsic value come to think of it) will by definition end badly for many if not most. Hard to tell what the early indicators of that will be; I for one would have predicted this cycle to have turned by now especially as existence cost in the Bay Area is making it fantastically expensive to hire and retain folks. But like that other thing, I’ll know it when I see it.”

**In sum, average confidence declined among the responding venture capitalists for Q2. This is the second consecutive quarterly decline in the confidence index and its lowest level in two years.** While confidence in the underlying strength of the Silicon Valley ecosystem and its entrepreneurs’ innovative capacity and determination remained, worries about hefty valuations, the increasing costs of doing business, new demand/supply dynamics created by new venture investor categories, and the potential impact that macro issues may have on the venture environment tempered sentiment.

Overall metrics of the venture business model reached historic levels (e.g. fund-raising and investments) in the second quarter, but a number of venture capitalists in this survey focused on the sustainability of these trends and their relationship to exit prospects and ROI given increasing valuations. In fact, the very strong venture metrics of fundraising and investments in Q2 may, in part, be driving valuations to points that concern some venture investors. While the powerful ecosystem in Silicon Valley for venture creation, innovation, and long-term value creation continues to grow stronger, short to medium-term prospects for positive investment results appear somewhat less certain.

**Table 1**  
**Participating Venture Capitalists in the 2015 2<sup>nd</sup> Quarter Confidence Index Survey**

Participant	Company
Bill Byun	7 Capital
Bill Reichert	Garage Technology Ventures
Bob Bozeman	Eastlake Ventures
Dag Syrrist	Vision Capital
Dan Lankford	Wavepoint Ventures
Deepak Kamra	Canaan Partners
Dixon Doll	DCM
Eric Buatois	Benhamou Global Ventures
Gerard van Hamel Platerink	Redmile Group

Igor M. Sill	Geneva Venture Management
Jack Young	Qualcomm Ventures
Jeb Miller	Icon Ventures
John Malloy	BlueRun Ventures
Jon Soberg	Expansive Ventures
Karan Mehandru	Trinity Ventures
Paul Holland	Foundation Capital
Robert R. Ackerman, Jr.	Allegis Capital
Sandy Miller	Institutional Venture Partners
Shomit Ghose	Onset Ventures
Standish O'Grady	Granite Ventures
Stephen J. Harrick	Institutional Venture Partners
Tim Draper	DFJ
Tom McKinley	Cardinal Partners
Venky Ganesan	Menlo Ventures
Anonymous	Anonymous
Anonymous	Anonymous
Anonymous	Anonymous
Anonymous	Anonymous

Mark V. Cannice, Ph.D. is Department Chair and Professor of Entrepreneurship and Innovation with the University Of San Francisco School Of Management. The author wishes to thank the participating venture capitalists who generously provided their expert commentary. Thanks also to Jack Cannice and James Cannice for their copy-edit assistance. When citing the index, please refer to it as: *The Silicon Valley Venture Capitalist Confidence Index®*, and include the associated Quarter/Year, as well as the name and title of the author.

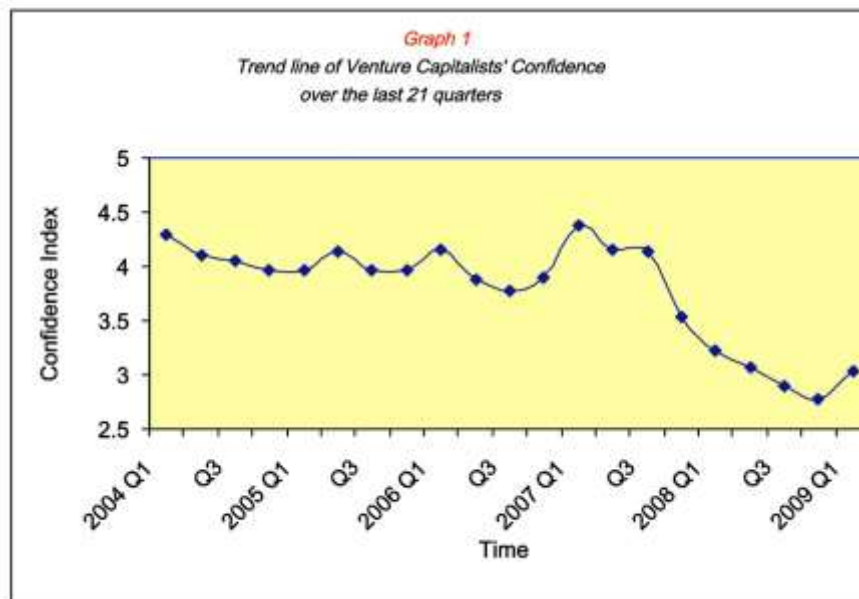
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## Silicon Valley Venture Capitalist Confidence Index™ (Bloomberg ticker symbol: USFSVVC)

**First Quarter – 2009**  
(Release date: April 8, 2009)

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The quarterly *Silicon Valley Venture Capitalist Confidence Index™* (Bloomberg ticker symbol: *USFSVVC*) is based on an on-going survey of San Francisco Bay Area/Silicon Valley venture capitalists. The Index measures and reports the opinions of professional venture capitalists in their estimation of the high-growth venture entrepreneurial environment in the San Francisco Bay Area over the next 6 - 18 months.<sup>1</sup> *The Silicon Valley Venture Capitalist Confidence Index for the first quarter of 2009, based on a March 2009 survey of 30 San Francisco Bay Area venture capitalists, registered 3.03 on a 5 point scale* (with 5 indicating high confidence and 1 indicating low confidence). This quarter's reading rose from the previous quarter's reading of 2.77 (a 5 year low) and ended a five-quarter trend of new lows in confidence. This breaking of the downward trend in VC confidence provides hope for an eventual recovery in the high-growth venture environment. Please see Graph 1.



<sup>1</sup> Publishing a recurring confidence index of professional venture capital investors is intended to provide an on-going leading indicator of the overall health of the high-growth new venture environment. Questions about this study or related issues should be addressed to the author at [Cannice@usfca.edu](mailto:Cannice@usfca.edu).



**While concern over the state of the national and global economy and financial system remains, a sense of foreboding appears to be giving way to an expectation of eventual, if slow, recovery in the high-growth venture environment.**

This *mustard seed*<sup>2</sup> of hope appears to be taking sprout among a majority of the venture capitalist respondents who provided their insight to the March 2009 survey. And it is nurtured by venture capitalists' faith in the resilience of entrepreneurs to build efficient enterprises with disruptive solutions, more modest expectations for growth and valuations, and the early stages of a stabilization in the financial system. Most importantly, this hope is leading to a more optimistic climate and new investments, with numerous VCs believing that great companies tend to be launched in difficult economic environments. As venture capitalists take a long term perspective in shepherding their portfolio firms over years rather than quarters, investments made today are expected to grow and blossom on the other side of the current economic malaise. The modest but measurable uptick in confidence in Q1 breaks the extended decline and provides an important step toward new entrepreneurial growth opportunities. In the following, I provide many of the comments of the participating venture capitalist respondents along with my analysis. Further, all of the Index respondents' names and firms are listed in Table 1 save those who wished to remain anonymous.

**Venture capitalists' concern over the continuing global economic crisis remains, but signs of stabilization have been noted by some of this study's respondents.** For example, Debra Beresini of invencor stated, "I see signs... (Hopefully, this is not the same as seeing 'dead people'). There are signs the economy is trying to overcome uncertainty. There are signs that the stock market is trying to avoid its recent roller coaster ride. There are signs that house sales have increased given lower interest rates, reduced prices and economic incentives, and there are signs that venture firms are beginning to invest again. These firms, however, are focused on investing into very narrow and specific niche markets; but they are looking and investing. There are no guarantees, however, that the economy has hit bottom and will continue to rise, but I see signs..." Ms. Beresini continued, "I was in Washington DC a few weeks ago and there is a positive energy in the air; there was a feeling of hope. We might not like all the stimulus incentive packages, but if they work, we will look back and wonder why these incentives weren't implemented sooner."

**However, the macro economy is still seen as negatively impacting several aspects of the venture capital business model.** Chester Wang of Acorn Campus Ventures detailed several issues that remain problematic. Mr. Wang maintained that the public market is cheap as an alternative investment to venture capital, and capital calls to limited partners and access to exit markets are tight. Also linking the macro economic environment to the venture business model, Joe Mandato of De Novo Ventures stated, "There is so much concern about the economy and uncertainty in the investor base that deals are becoming much more difficult to finance and funds are needing more time raising money."

*The continuing lack of exit opportunities are especially worrisome.* Jim Marshall of Selby Ventures emphasized, "Raising follow-on rounds of financing from new investors continues to be a challenge and existing investors are having to allocate more capital to support their portfolio companies. This, combined with the lack of liquidity (IPO or M&A) in the market makes for a challenging time in our industry." In fact, Thomson Reuters and the National Venture Capital Association reported on April 1 that no venture-backed firms had an IPO in Q1. This makes for two consecutive quarters without a venture-backed IPO, the first time on record that this has occurred. They also reported that registrations for IPOs are down and M&A volume was light.<sup>3</sup>

<sup>2</sup> Borrowing the oft used phrase of optimism by Mr. Lawrence Kudlow of CNBC.

<sup>3</sup> "Venture-backed exit market remains a concern in the first quarter", Thomson Reuters and the National Venture Capital Association, April 1, 2009.

Also tying the macro economy to the lack of liquidity events, a respondent who wished to remain anonymous said, “The deteriorating economic climate will likely extend exit periods for VC-backed companies by 2-4 years beyond the forecasts of Q3 and Q4 2008. This means that even profitable start-ups will take a longer time to exit than previously forecast.” Two other respondents who wished to remain anonymous also pointed to the lack of exit opportunities (e.g. IPOs). Clearly, the lack of liquidity events for this extended period puts a significant strain on the venture capital business model. Dan Lankford of Wavepoint Ventures also noted the lack of exits but indicated, “Deal flow remains reasonably good,” while another respondent reasoned that “economic conditions make it very difficult for start up companies to build their business,” and another expects inflation to be a rising problem later this year.

**Some respondents envisioned the current economic adjustment as a necessary cycle to ensure the long-term health of the venture environment.** For example, Venky Ganesan of Globespan Capital argued, “The era of liquidity driven growth powered by easy money and leverage is over. We went from a game in which we had a large number of players (entrepreneurs and workers) with a small number of people making bets on them (financiers) to a situation where we had very small number players and large amounts of people making bets on them, and, worse, we had people making bets on the people making bets. The good news is that this madness is over. The hangover is going to be painful but recovery is already on the way. We are back to growth driven by creating unique and innovative products and services that power productivity increases. This is what Silicon Valley does best and I have no doubt that in the next few months/quarters we are going to see the bloom of innovation in the Valley.”

*And commenting on venture capitalists’ response to the on-going economic malaise,* Tom Rogers of Advanced Technology Ventures indicated, “Given the uncertainty, most VC firms are in cash preservation mode to some extent. While this means that capital for private companies is certainly harder to come by, the most attractive companies will continue to get funded. While this means pain for some, particularly those that offer incremental as opposed to disruptive solutions or those that got caught in between milestones and needing cash, overall this will improve the long term health of the entrepreneurial environment.”

**And some responding VCs see the downturn in the economy as an opportunity to build great companies.** Prashant Shah of Hummer Winblad Venture Partners shared, “In a struggling economy, the real innovators emerge. And for firms like ours who have capital, there is no better time to invest in new startups.” And Sandy Miller of Institutional Venture Partners reasoned, “While the environment seems gloomy with no end in sight we need to remember that some of the best companies have been founded and built during bleak times. True entrepreneurs will continue to find ways of moving their ideas forward. From a venture investor standpoint 2009 and 2010 should be an attractive environment for new investments though there will be little liquidity for existing investments.”

And Jeb Miller of JAFCO offered, “We view this as a very promising time to start a new company. Big companies have cut back on product roadmaps and compensation and there is plenty of capital and strong talent available for new ventures. There is a premium on capital efficiency, but new startups have the opportunity to develop disruptive technologies and business models that will intersect the market as we come out of the current financial malaise.” Echoing this sentiment is Igor Sill of Geneva Venture Partners who offered, “As bad as things seem today, I anticipate a recovery back to the norm in 2010, for both venture investing and the IPO market. I expect a very difficult 2009, but recognize that a down market cycle is the best time to invest in promising startups when valuations are reasonable and market testing of solutions tend to provide a true ‘litmus test’. We know that there is no recession on innovation, and great companies and ideas have always emerged from troubled times.”

*The passage of time itself will tend to bring new investments.* Dag Syrrist of Vision Capital provided, “As doing nothing will be harder and harder and the realization that no return can be generated by not investing, firms will start deploying capital again especially as cost of funding business is low compared to historical standards. The effect of a slower growth cycle may possibly also contribute to higher quality companies being built. While exits may be further in the future, a slowing economy forces companies (and their investors) to actually provide something of value to customers...” Also looking on the bright side, Shomit Ghose of Onset Ventures declared, “On the one hand it’s like a Roach Motel: there’s no exit market, so money comes in but can’t get out. On the other hand, innovation and entrepreneurship continue to barrel along in sixth gear: there’re a lot of disruptive investing opportunities out there.” And Dan Lankford of Wavepoint Ventures noted, “Some portfolio companies are thriving during the downturn. Particularly encouraging is the likelihood that larger technology companies will be looking to acquire technologies or products as the economy recovers.”

**Others expect the current economic upheaval will lead to an unleashing of sophisticated talent into the entrepreneurial economy.** This additional talent coupled with the necessity of efficient execution will tend to produce successful new firms. For instance, Bruce MacNaughton of Crosslink Capital calculated, “The combination of the poor economy combined with little innovation at big companies leads many bright entrepreneurs to follow their passions, and the best companies get built by following passion.” In a similar vein, Savinay Berry of Granite Ventures indicated, “Historically, some of the most successful companies have been started in the middle of a recession. This is due to the availability of talent, a focus on a lean operating structure, and a self-selection process for raising capital. This time is no different. Companies started during this recession would have a good chance of being successful if they can adopt and adapt to the attributes described earlier.” And Graham Burnette of SBV Partners added, “Our firm invests at the early stage - when companies are unlikely to have products to sell. Thus, an economic downturn is a good time for us to invest. There are more skilled people to recruit, scarce resources are less scarce, and the eventual customers are more open to ideas for solving problems in newer, innovative and less costly ways. We think this is a good time to invest, and valuations are low.”

**And some see the economic downturn ending or at least a transition to a new normal.** For example, Kirk Westbrook of Invencor said, “It appears the US may be emerging from an unprecedented nuclear winter, as is evidenced by the very recently emerged buds on the branches of the now stark economic tree. What remains to be seen is if this is a false spring or if, in fact, the recent Washington programs will have the effects that were targeted, with success in dealing with the financial institutions bearing the greatest impact. Regardless of the improvement, I believe that the US economy has experienced somewhat of a social reset. I do not think we will return to the voracious consumption patterns that were made available by the lax credit environment. As a consequence, I believe revenue assumptions for consumer facing high-growth ventures must realistically consider the resulting spending pattern shift likely to occur as the more fiscally constrained environment emerges within the next 12 months.”

*As the economy bottoms out, investment should resume over time.* Richard Yen of Saban Ventures offered, “There’s some hope that the worst economic times are behind us, though it’ll take time for VCs to pick up the pace and resume making new investments.” And David Epstein of Crosslink Capital explained, “The environment is improving in sentiment, if not in dollars. Although the available dollars do not immediately increase on the improved outlook in the public markets, the talk is now a little more of “when” than if. The weaker VC’s are likely to fold, but there are many others that are planning their next raise (still 12-24 months out). This is allowing a little more seriousness in new non-portfolio investments. Although the portfolio companies are still taking the majority of the time and funding dollars, Series A and recap deals are getting done as well. It will take at least 2 years for things to stabilize, but at least we’re talking about that recovery.”

**Meanwhile, certain sectors of investment were viewed more optimistically.** Bryant Tong of Nth Power stated, “The Clean Tech sector continues to be one of the few bright spots in venture capital for early stage investors. With billions of government money targeted in this area, R&D will be robust and new and promising technologies will be the result.” And Dan Lankford of Wavepoint Ventures added, “... We are seeing particular growth in the number of capital efficient clean tech deals.” The new administration has strongly signaled its support for the development of clean energy alternatives. Most recently, on March 23, President Obama met with representatives of the venture capital industry and reiterated his support for innovation in this area. Strong political and social focus on clean tech development does bode well for the long term opportunity in this sector.

**But, not every respondent was convinced that the economic path was clear as concern over the impact of US government policy on entrepreneurial innovation was emphasized.** For example, Joe Mandato of De Novo Ventures specified that, “Contributing to the overall industry concern is the talk about taxing carried interest as ordinary income, which makes little sense.” And Bob Ackerman of Allegis Capital argued, “While entrepreneurs continue to innovate – it is increasingly difficult for these young companies to secure the capital they require to grow and prosper. At the same time – government - on all levels – is taking actions that make it more difficult for capital to form to support these entrepreneurs and for these entrepreneurs to build their companies. Capital and talent are highly portable and are attracted to environments where they can be profitably deployed. It is becoming increasingly clear that the US in general – and California in particular – are not as attractive as they once were. Thousands of entrepreneurs have returned to India and China over the last couple of years and billions of dollars of investment capital have followed. The new industries and jobs they are creating – would have been the exclusive domain of the US economy just a few short years ago.”

*And concern over the long term impact on the VC business model was expressed.* Steve Carnevale of Point Cypress Ventures stated, “The venture capital industry is in crisis and risks systemic collapse like other segments of the financial industry. The current returns are low, near term future prospects remain dismal, fund investors are canceling commitments and raising future funds is doubtful for all but a few of the best firms. There are not enough high return deals to support a \$20+ Billion a year size of the venture industry as it is currently structured. The vast majority of the venture firms will go back to smaller early stage deals. ... Rather than investing tens of millions of dollars to create a billion dollar company, venture firms will invest a few million dollars to create a hundred million dollar business. This venture bubble of the last decade has proven that the venture business is not scalable because it depends on the hard work of professionals to help grow small innovative businesses. There are not that many billion dollar business opportunities. .... This is bad news for the venture industry, but good news for entrepreneurs. The next successful companies will be started during this downturn. But it will not be from a huge investment...”

**To sum, while concern about the global economic and financial environment and its impact on capital availability continues among the respondents in this quarterly report, a rising confidence in an eventual recovery is emerging.** Further, the articulation that economic turmoil tends to propel innovative and operationally efficient new enterprises forward became a rising theme. And the emergence of these new ventures is expected to be fueled by a wave of entrepreneurial talent unlocked from larger corporations. This evolutionary process of *forced entrepreneurship* – while very painful – will in time – with the support of patient venture capital help ensure the broader local and national economic recovery. And, importantly, confidence did turn upward in Q1 after 5 consecutive quarters of declining sentiment. Drivers of this increase in confidence appear to range from the expectation of a stabilizing financial system, but also from the observance of more efficient execution of existing and new portfolio firms.

Further, as VC fund-raising has declined, less capital is available to chase the same number of attractive deals. This adjustment to the supply/demand relationship for venture capital/venture deals is driving down

valuations and creating the pretext for better long term investments for the venture community and their limited partners<sup>4</sup>. This notion is consistent with findings of a recent empirical study that saw venture capitalists' confidence rise after declines in total fund-raising.<sup>5</sup> And while liquidity events have remained elusive over the last 5 quarters, the recent nascent recovery in the public capital markets, if it can be sustained, will tend to increase the likelihood of new venture-backed IPOs, especially given the presumed pent-up demand for such offerings.<sup>6</sup> Interesting to note is that the significant decline in VC confidence in Q4 2007 (a quarter that featured a strong exit market) preceded the major decline in IPOs over the next 5 quarters. It remains to be seen if this modest uptick in confidence in Q1 2009 presages the opening up of the IPO market. However, the rise in confidence among Silicon Venture Capitalists in Q1 after 5 quarterly declines provides a sign of hope that recovery is a matter of 'when' rather than 'if'. As the rise in confidence translates to further investment, the emergence of new world class firms is bound to follow. Recovery will come, and it will start with entrepreneurial endeavor, and it will be guided and accelerated by venture capitalists' support. See the *signs*.

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<sup>4</sup> On January 19, 2009 Thomson Reuters and NVCA reported a significant drop off in fund raising activity in Q4.

<sup>5</sup> In a related empirical study (forthcoming in the International Journal of TechnoEntrepreneurship) that examined the relationship between VC confidence and industry wide capital commitments to venture-backed firms, I found with my co-author, Dr. Cathy Goldberg that declines in overall capital commitments preceded increases in VC confidence. This may be due to the supply/demand relationship where fewer dollars were chasing the same number of attractive deals, thus, driving down the price (valuation) of some attractive investments and enabling increasing ROI. This relationship appeared to hold from Q4 2008 (a decline in fund-raising) and Q1 2009 (an increase in confidence).

<sup>6</sup> In a related empirical study (forthcoming in the Journal of Small Business and Entrepreneurship) that examined the relationship between VC confidence and liquidity events, I found, with my co-author, Cathy Goldberg, that increases in VC confidence tended to precede an increase in IPOs of venture-backed firms.

**Table 1**

**Participating Venture Capitalists in the 2009 1<sup>st</sup> Quarter Confidence Index Survey Participant**

	<b>Company</b>
Bob Ackerman	Allegis Capital
Bruce MacNaughton	Crosslink Capital Bryant Tong
	Nth Power
Chester Wang	Acorn Campus
Dag Syrrist	Vision Capital
Dan Lankford	Wavepoint Ventures
Daniel Ciporin	Canaan Partners
David Epstein	Crosslink Capital
Debra Beresini	invencor
Deepak Kamra	Canaan Partners Graham Burnette
	SBV Venture Partners
Igor Sill	Geneva Venture Partners
Jeb Miller	JAFCO
Jim Marshall	Selby Ventures
Joe Mandato	De Novo Ventures
Kirk Westbrook	invencor
Mudit Jain	Synergy Life Science Partners Prashant Shah
	Hummer Winblad Venture Partners Richard Yen
	Saban Ventures
Sandy Miller	Institutional Venture Partners
Savinay Berry	Granite Ventures
Shomit Ghose	Onset Ventures
Stephen Harrick	Institutional Venture Partners Steve
Carnevale	Point Cypress Ventures
Tom Rogers	Advanced Technology Ventures Venky
Ganesan	Globespan Capital Partners Anonymous
	Anonymous
Anonymous	Anonymous
Anonymous	Anonymous
Anonymous	Anonymous

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\*The author wishes to thank the participating venture capitalists who generously provided their expert commentary and analysis as well as Tomosue Den, USF MBA Candidate, for his extensive survey and technology support. Webmasters are welcome to link to this page with courtesy notification to Cannice@usfca.edu. When citing the index, please refer to it as: *The Silicon Valley Venture Capitalist Confidence Index™*, and include the associated Quarter/Year, as well as the full name of the author. Reports for previous quarters may be found at [www.Cannice.net](http://www.Cannice.net).

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**APPENDIX 17**  
**PIE Executive Summary**

Strategic Recommendation:  
Partners in Entrepreneurship Program (PIE)

School of Management  
University of San Francisco

Elizabeth B. Davis, Dean, School of Management, Co-Chair  
Opinder Bawa, Chief Information Officer, Co-Chair

September, 2016

**Executive Summary**  
**USF Incubator/Accelerator Project**  
**Partners in Entrepreneurship (PIE)**

**1. Report Background /Overview**

This report is meant to be a compilation of work done to answer two questions for USF:

1. Should we create an incubator/accelerator for the institution? and IF YES
2. What would the strategic focus of an incubator/accelerator reflect? The first piece is the Strategic Recommendation from the School of Management for developing the PIE Program (Partners in Entrepreneurship) Program.

**B. This report has five sections:**

- A review of the purpose and objectives of this project. (p.3)
- A strategic recommendation for the Incubator/Accelerator: PIE Program. Current proposals for partnerships and a preliminary budget request. Provide a broad vision for development of Institute for Globally Responsible Enterprise (p.3)
- A review of sample USF activities in this accelerator/entrepreneurship area (p.17)
- Site visit summary by the team (p.28)
- Comments from the team (p.36)



This report provides background information from a series of site visits completed by members of this team over the past spring, 2015 in an effort to examine the SF Bay Area field of competition. The document summarizes the basic mission and focus of the series of incubator/accelerators site visits conducted by a team which included a cross section of faculty and staff as led by Elizabeth Davis and Opinder Bawa;

1. Identifies a list of some current SOM and USF activities currently active in this social entrepreneurship/entrepreneurship space that are in place, but currently lack organizational glue.
2. Presents in detail a series of current and potential partners for moving forward.
3. Additional comments/perspectives have been included at the end of this report and an appendix has been added, which more information about the accelerators/incubators visited during the field research period.

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- **Purpose, Objectives:**

The purpose and objectives of this effort have been identified below:

**A. Purpose:**

Recommend a strategy for developing an incubator and/or accelerator for USF.

**B. Objectives:**

- Evaluate the feasibility of USF establishing an incubator/accelerator in San Francisco at the 101 Howard location through an examination of university groups and organizations currently operating to determine the potential for a stand-alone USF venture or strategic alliances/joint ventures in the SF startup ecosystem.
- Commit to an institution-wide model of entrepreneurship activity which operates in both for-profit and non-profit models consistent with USF values.
- Generate a strategic recommendation to the President of USF, Father Paul Fitzgerald.
- **Strategic Recommendation: Incubator/Accelerator – Partners in Entrepreneurship (PIE)**

This proposal deals with catalyzing the **PIE Program** through the development of Strategic Partnerships as part of a larger SOM effort in Globally Responsible Enterprise development.

**c. Background:**

The landscape in San Francisco is full of competitive players in the areas of entrepreneurship, social innovation and enterprise acceleration. Most players specialize in one of three areas. Very few of our competitors focus on the education of leaders using an integrative philosophy of stakeholder engagement and social responsible development for building, implementing and strategically leading organizations.

The SOM is uniquely positioned to integrate these areas. By creating several programmatic efforts which focus on creating leaders who will establish new ventures and organizations with a managerial focus on the strategic organizational performance our leaders will produce higher rates of return and greater stakeholder value using socially responsible management principles. An educational approach such as this emphasizes conscious leadership practices combined with entrepreneurial activity that is equally focused on stakeholder and shareholder returns and at the same time exercises socially responsible action.

The SOM has the infrastructure and philosophical underpinnings and curriculum to launch this kind of programming (programs/faculty in for-profit; non-profit and government expertise all located under one roof) To accomplish such a strategic goal for the School requires an effort that is multipronged and programmatically targeted – this proposal outlines a programmatic component of this larger by effort called the **PIE Program (Partnerships in Entrepreneurship)**.

The **PIE Program** envisions a series of SF BAY partnerships all focused on advancing the development of small startup enterprises linked to the student, alumni and external stakeholders of the University of San Francisco.

Through these partnerships, **PIE** is meant to tie directly into the startup student teams and individual entrepreneurs in the USF community through courses and non-degree curricula; a global network of entrepreneurs and a shared space for entrepreneurial activities such as lectures, tech events and hackathons. **PIE** integrates and uses the existing talents and expertise of well-known incubator/accelerator organizations who have proven skills in the development of entrepreneurship curriculum with a hands on focus and uses the talents of existing faculty expertise all linked to a global network of entrepreneurs.

#### **d. Strategic Partners:**

Specifically **PIE** is targeting two initial partners this academic year.

First, **Impact Hub** and our proposed second partner is **AngelHack**. Both partners bring different strengths to the table.

1. **Impact Hub** has years of experience in the development of startup both for-profit businesses and social enterprises with a focus on accelerating existing business ideas through their entrepreneurship network of 11000 members located in hubs in 63 countries around the world. (See Appendix for details and locations of the Hubs worldwide). **ImpactHub** is interested in working with USF given that to date it has no university partners and is seeking to develop a university model which can then be replicated throughout the world. We have been chosen by **ImpactHub** because of our history, philosophy around enterprise development and have close ties - the Chairman of the Board, Tim Freundlich is a USF alumnus.
2. Second: **AngelHack** through its proposed entrepreneurial practice curriculum offerings for small businesses and interest in the development of social enterprise and expertise in Change seeks a relationship with a university partner who shares the same philosophy around business development particularly in the social enterprise space. **AngelHack's** CEO, Sabeen Ali, is also an Alumnae of the SOM and has sought us out. In fact **AngelHack** did some of the original survey work for the development of this proposal. (see details of AngelHack operations in the Appendix).

The CEOs of the two proposed Partnerships: Tim Freundlich, Chairman of the Board, **Impact HUB** and Sabeen Ali, CEO of **AngelHack** – both have agreed and are excited to start the **PIE Program**. Finalizing a business model is a strategic priority. The final business model must look for a revenue model and stream that will ultimately be a sustainable operation.

Both partners have agreed to work out partnership agreements designed to catalyze business development, social enterprise aimed at producing globally responsible enterprises managed by leaders who share the SOM philosophy of business development around conscious capitalism and conscious leadership practice.

#### **e. Startup Requirements for PIE: (2015-2016)**

##### **1. Startup Phase PIE: Establishing Strategic Partnerships**

For this startup process we are recommending the formation of an Enterprise Incubator/Accelerator with an initial focus on Social Enterprise and Innovation and catalyzed with strategic partnerships in an effort to limit exposure and risk and leverage relationships in the SF Community. Throughout the fall of 2015, USF will seek to form partnerships with the following organizations, to be secured by the March launch of the Social Impact and Innovation. An official launch would be in March 2016. The list of initial partners include:

##### **a. Strategic Partnership #1: ImpactHub**

**ImpactHUB@USF** is not so much a 'place' as a program feature, connectivity from and to USF into **ImpactHub's** global network; this would be a new class of **Impact HUB** as one of the first non-commercial network members.

The focus of our partnership with **ImpactHub** would be connecting undergraduate and graduate students into a global networks of internships, research and practicum projects and JOBS in the impact economy.

All student members in the PIE HUB would be members of all HUBS globally and can interact with a rich digital collaboration platform and see all members globally to exchange data and information related to startups and opportunities on a global scale. Members will become “cool kids” on campus as members at the PIE Hub and will be able to take advantage of special event series offered at the 101 Howard location. This will also tie into SOCAP once a year which is the largest social enterprise global gathering run in SF by ImpactHub annually – students will receive discounts for attendance.

- **Space Suggestions:** New Howard St campus needs a dedicated “ImpactHUB” which is a flexible lounge/meeting/collaboration area that can be used by all of the programmatic elements of USF’s *Change the World from Here* activities, including ImpactHUB@USF branded activity. We would still make our IP available to give design input, and would install some limited branding as appropriate. But it wouldn’t be a ‘licensed’ ImpactHUB, rather a program annex and partnership w/ ImpactHUB SF. We can brainstorm design, but as a sketch it would be good if there was access to an open space for receptions that could house 100pp give or take (1200-1500sf) that could also serve as collaboration, presentation, general work space, lounge, etc., with a kitchenette within or adjacent. Also, a few various sized meeting/team rooms between 120sf and 240sf (6-12pp for meets, 3-6pp working teams) could be used most often as meeting rooms, small skills acquisition seminars, etc., but could also be designated for teams for short periods during high activity (a student team on a project, a class team, a visiting international team/program, etc. if we had 2k or 2.5k to work with we could make a good multifunction, flexible space. Ideally, the cubicles in this space would be converted to open workspace to maximize use and efficiency.
  - **Membership Model for USF in ImpactHub and SOM Administration:** We would work out an administration contract to integrate into MissionHUB’s back office functionality for members, billing etc. We could jump off from the previous contract to expand it. By creating a “Connect” membership that was affordable, we could bring many students and alums into the global membership through ImpactHub SF. This would allow PIE-USF members to access all spaces globally for occasional use, come to member events, digitally collaborate, access content, and network, seeing all members globally, plus access various discounts. This also would include a SOCAP package of volunteer (free), partial volunteer (75% off) and partner discounted (40% off) for students, alums and faculty in numbers TBD, but at least initially including five full, 10 partial and 50 partner discount slots for SoCap. IMPACTHUB could extend this beyond SF to outreach to alums across the globe.
  - **Programming: ImpactHub@PIEUSF** would be more a feature of the PIE- USF combined collection of *Change the World from Here* activities, connecting outside content into the USF community, to events, internships and job and program opportunities (e.g. participation in an accelerator cohort that is running in ImpactHub SF, etc.) than programming per se at USF, as USF would have lots of its own content and activities...and connect those into the broader ImpactHub network as appropriate
2. **Business Model:** Corporate and Foundation Sponsors (especially alumni-led entities that like the branding and give back to the school around innovation and mission identity), including for a nominal fee ‘club’ memberships for students (maybe \$10/month maximum); further there could be a work-trade option for some ‘hosts’ to anchor ImpactHUB@USF activity, with perhaps three students that could own the relationship each year and share some of the logistics and program needs with a faculty advisor perhaps, slightly higher rate for Alums but still modest, akin to a KQED support level (\$20/month, small donor alums might also feed in to the extent that this program partnership can be part of the story of outreach to them by USF, and lastly from student life/university department budgets.
  3. **ImpactHub Network Community Membership:** USF is simply a part of ImpactHub PIE-USF, which is at least for phase one –would offer a membership to all students and faculty who are interested in entrepreneurship and advancing their business ideas.

#### b. Strategic Partner #2: AngelHack

Our second proposed partnership is with **AngelHack**. **AngelHack** has demonstrated excellent capability and accelerating change and advancing business development of small startups in the SF bay area. They do this through hackathons aimed at creating a platform for new business development. Their success is well known in the Bay area. **AngleHack’s HACKcelerator** has accelerated 60+ companies to date, two of these small companies were Google acquisitions in 2014. Five companies developed out of the Hackathon events went on to attend top-notch accelerators like Y-Combinator, TechStars, 500 Startups and Microsoft Accelerator. Their last Demo Day attracted 150+ Investors and 10 high profile judges from leading accelerators and venture firms. They have a unique change agent platform unlike other potential collaborators.

**AngelHack** is an ideal partner as their own strategic objectives seeks:

- Seeking alignment with USF's Jesuit Tradition and Mission consistent with their own organizational philosophy.
- Catalyzing USF brand within the Innovation/Startup community
- Establishing strong ties into the local VC/Startup ecosystem through this collaborative venture.
- Committed to a partnership ensuring financial sustainability while focusing on social impact.

A proposed PIE curriculum that is **non-degree** but offered to the USF community of students, faculty, alumni might include the following components:

- A. Starting a Startup: The Building Blocks / Problem Identification / Social responsibility
- 2 Ideas, Teams and Execution
  - 3 Building Product, Talking to Users, and Handle Competition
  - 4 Growth (hacking) / Scaling for Nonprofits
  - 5 Build Products Users Love / Customer Intimacy and Other Value Disciplines
  - 6 Developing your Brand: Choosing the right Image / PR Basics Curriculum recommendation
  - 7 Financing Avenues / How to Raise Money / Venture Capital for Nonprofits
  - 8 Company Culture / Motivating a Healthy & Ethical Workforce
  - 9 Enterprise and Consumer Related Products and Services
  10. Be A Great Founder / Management Basics / Organizational Justice / Ethics
  11. Legal Basics
  12. How to Pitch / Entrepreneurship and Confidence / Body Language

This approach offers the opportunity for our own faculty (SOM; Law; A & S) to be involved in this kind of non-degree teaching for the PIE Program opening our doors to serve the community around us as well. AngelHack has expertise in this space and is eager to fully develop such a curriculum.

A partnership with AngelHack allows us to establish an inclusive cohort for Innovation within USF community involving students but alumni and potentially community members. This partnership would Leverage ALL USF schools to work in this collaborative space on entrepreneurial ventures and open the door to cross-functional, multidisciplinary work at USF using the PIE Program as a springboard.

- **Strategic Partner #3 - School of Management Partner: PIE Incubator Operational Foundation**

The SOM can provide a foundation for building the incubator/accelerator space by bringing existing courses, students, alumni relationships to the table – specifically :

- **Student Social Enterprise Competition.** Included in this launch would be a SOM social venture competition, timed also with a leadership speaker series in Conscious Leadership and Business Development funded by the Harari Program in Conscious Capitalism (HPCC).
- **Courses.** Existing SOM courses that would align with the PIE Program include:
  - MBA required fall course, Ethics and Socially Responsible Business.
  - Existing two-unit Social Entrepreneurship elective course offered in spring "A" 2016, open to all graduate students.
- **Student Practicums.** We would also launch socially related practicums, which would give the students opportunities to build work experience, while providing valuable insight to community centric activities. These could be offered through the Malloy group, and structured into independent studies occurring in the spring and summer.
  - A new two-unit Social Sector Consulting course in the Spring 2016 for those graduate students interested in social sector careers, appealing to a cross section of SOM's graduate students

- Practicum course throughout the summer semester 2016, appealing to students who wish to hold internships, while also having ongoing mentoring and engagement.
- **MSIE.** The new Masters in Science of Innovation and Entrepreneurship would allow students to focus in the social sector, and to fulfill their practicums through center related activity. It would also allow students as part of their internship opportunity to focus on social enterprise. However the Incubator with its strategic partners would also allow graduate students to work and connect with Entrepreneurs on a global scale given Impact Hub and AngelHack's networks.
- **MGEM.** The existing practicum consulting practicum course could be more closely tied to the incubator activity. Now, MGEM students are involved with social enterprises such as Project Open Hand, World Reader, Goodwill Industries, Hiller Aviation Museum, B Lap Productions, and others.
- **Undergraduates.** SOM's undergraduate course in social entrepreneurship will also draw students into the SOM's CSII activities and competition. The Net Impact Club also includes undergraduate students. Finally, undergraduates will further benefit from mentorship from CSII's EIRs.

As a Strategic Partner in PIE we bring the infrastructure, students and knowledgeable faculty into participation of the life of PIE.

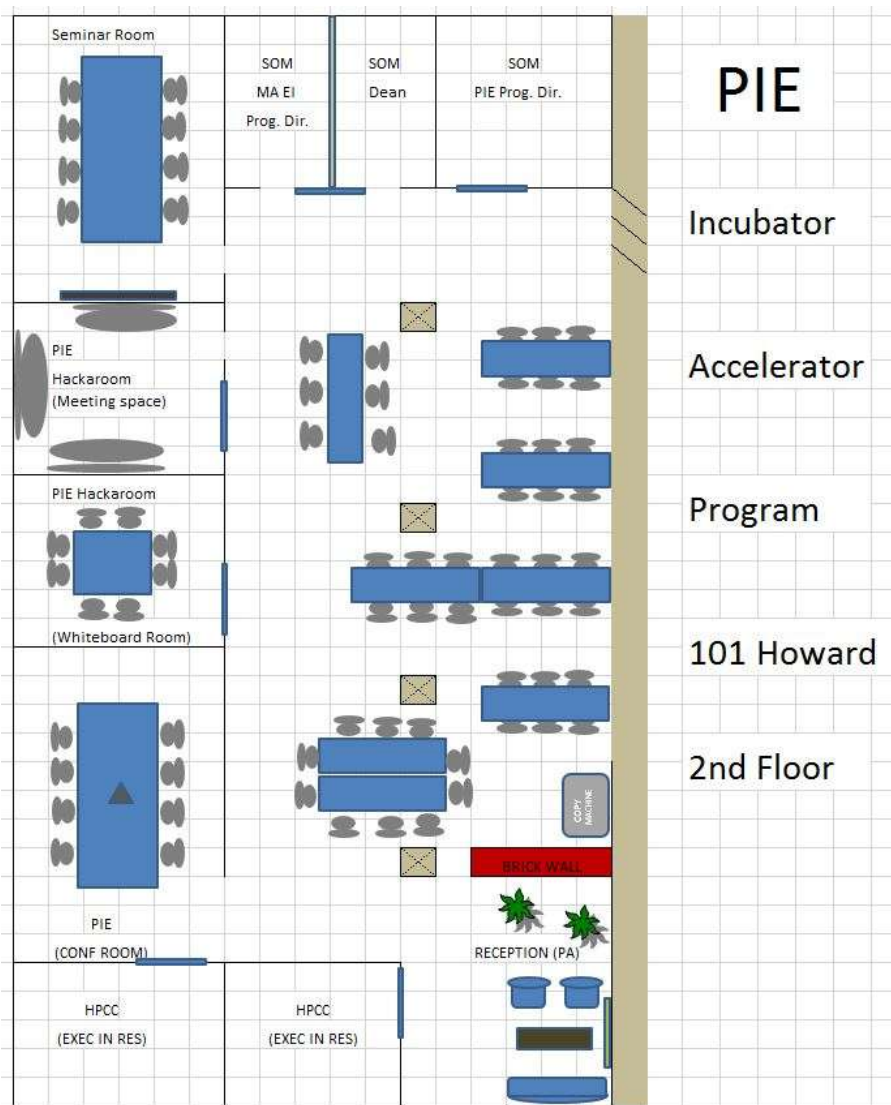
**f. Revenue/Cost Modeling: Financial Sustainability of PIE Program:**

Ultimately the PIE Program must become self-sustaining. Financial Sustainability for PIE means we also need revenue diversity. Potential other revenue streams (from for-profit organizations) –

1. Donations from alumni and SOM Dean's Circle
  2. Hosting entrepreneurial events for a broader audience
- Taking a small percentage of equity from portfolio companies
  - Charging an accelerator fee
  - ImpactHub memberships paid by students, faculty, Alumni and community members.

**g. Resource Requirements/ Budget for PIE:**

- **Space: 101 Howard (see diagram of proposed PIE space below)**
- Open, multi-functional space for meetings of any size, individual workers, students, partner representatives, faculty, and for events.
- Faculty Office for the Program Director for PIE
- Faculty Office for the Program Director of the new Master's Program in Entrepreneurship & Innovation
- Office for hoteling for ImpactHub and/or AngelHack on-site representatives
- Seminar room for special lectures for students on Entrepreneurial activities related to PIE activities
- Executive-in-Residences offices (2) in co-location with the Harari Program in Conscious Leadership/Capitalism activities.
- Work space for Program Assistant/Receptionist for PIE and the MSIE programs.
- Two (2) Hackarooms: Meeting spaces with whiteboard walls and multifunctional, non-traditional conference room furniture.



- **Equipment (est.):**

1	Conference/Seminar Rooms (2) : Conference table, chairs, installation of drop down screen and projector (A/V)	20000.00
3	Private Offices: Desks, Chairs, Bookcases, Filing Cabinets, Task Chairs (5 offices)	10000.00
4	Open Space: 8 moveable desks, 54 chairs, 12 white boards, lamps	5000.00
5	Reception: Two chairs, sofa, coffee table, plants, light fixture, artwork, reception desk and chair	5000.00
6	Hackarooms (2): Multi-purpose meeting room furniture, 6 white boards	3000.00
7	Photocopy Machine (Konica Minolta BizHub 284e copier machine)	2950.00
8	Carpet	4000.00
9	Office Supplies (paper, pencils, stationery, etc.)	1000.00
	Subtotal	50950.00

- **Renovation (est.)**

	Conference Room: Removal of bookcases	500.00
	Open Space: Removal of cubicles and center wall	10000.00
	Hackarooms (2): Installation of wall-to-ceiling whiteboards,	3000.00
	Entire suite: Prep & Paint	3000.00
	Electrical outlet installation	5000.00
	Subtotal:	21500.00

- **Administrative/Operational support:**

Part-time Program Director to be shared with Harari Initiative	35000.00
Coordinator for PIE events, activities, and coordinator with ImpactHub and AngelHack personnel (includes benefits)	95000.00
Program Assistant (part-time) for PIE shared with Harari Initiative (includes benefits)	30000.00
Marketing	20000.00
Subtotal	180000.00

TOTAL Startup:\$252,450.00

#### h. Beyond PIE: Building the Vision – An Institute for Globally Responsible Enterprise (IGRE)

##### **I. Building on USF's Vision and Mission**

The PIE program is part of a larger effort being developed in the School of Management devoted to creating an Institute for Globally Responsible Enterprise (**IGRE**), located at USF's San Francisco downtown campus and Lone Mountain. Several key initiatives within the school of management (SOM) are coalescing to create a strong point of differentiation for SOM within business and management school education. These involve the intersection of social innovation, leadership, entrepreneurship, non-profit administration, experiential learning, and business/community engagement.

This institute concept is a broad framework focused on activities linked to Social Innovation; Social enterprise development and Conscious Leadership (Socially Responsible Leadership) Practice and Research.

The Institute is meant to form a bridge linking all of these activities under one roof all parts advancing the development and education of students who understand how to develop and create enterprises that are engaged in producing greater stakeholder value through research, practice and educational experiences.

This **IGRE** builds on the university's mission, draws on faculty expertise and will be a strategic point of differentiation for SOM. The proposed Institute is in keeping with USF's vision:

*"The University of San Francisco will be internationally recognized as a premier Jesuit Catholic, urban University with a global perspective that educates leaders who will fashion a more humane and just world." With a further desire in its mission to "... distinguish itself as a diverse, socially responsible learning community of high quality scholarship and academic rigor sustained by a faith that does justice."*

It is noted that other business schools in the Bay Area (i.e., Presidio Graduate School's MBA in Sustainable Management, Santa Clara University's Miller Center for Social Entrepreneurship and Global Social Business Institute, Berkeley-Haas' Institute for Business and Social Impact, Stanford Business School's Center for Social Innovation), and even non-local schools (i.e., Wharton's Social Impact Initiative, Skoll's Center for Social Entrepreneurship, and Harvard's Social Enterprise Initiative) are being noticed for a blended educational framework focused on the intersection of business and society.

USF's IGRE will offer an integrated viewpoint on how Leaders of the 21<sup>st</sup> century will strategically lead and operate organizations committed to a philosophy of shareholders enhancement with equal emphasis on organizational stakeholders inside and outside the organization. This focus engages many of our existing and new activities proposed around this idea. The PIE program described earlier in this report is one component parts of the vision.

Of equal importance is the recent acquisition of monies provided by Alan Davis honoring Oren Harari's legacy and philosophy of "doing good in business/enterprise" or what we label conscious capitalism. (**HPCC - Harari Program in Conscious Capitalism**). **PIE** with **HPCC** combine and synergize to create a different experience for students, faculty and alumni. It offers the opportunity engagement in symposia with high profile speakers, Entrepreneurs/Executives in Residences (EIRs), incubation work spaces, and consulting opportunities alongside a social venture competition for current USF students and alumni.

There is a third component part of the **IGRE – the Center for Social Impact/Innovation (CSII)** (see **Appendix E for proposal for CSII**). This third component part will focus on educating the next generation on how to design, develop social impact tools which provide the analytical prowess to understand how organizations contribute to the triple bottom line: people, planet and profit.

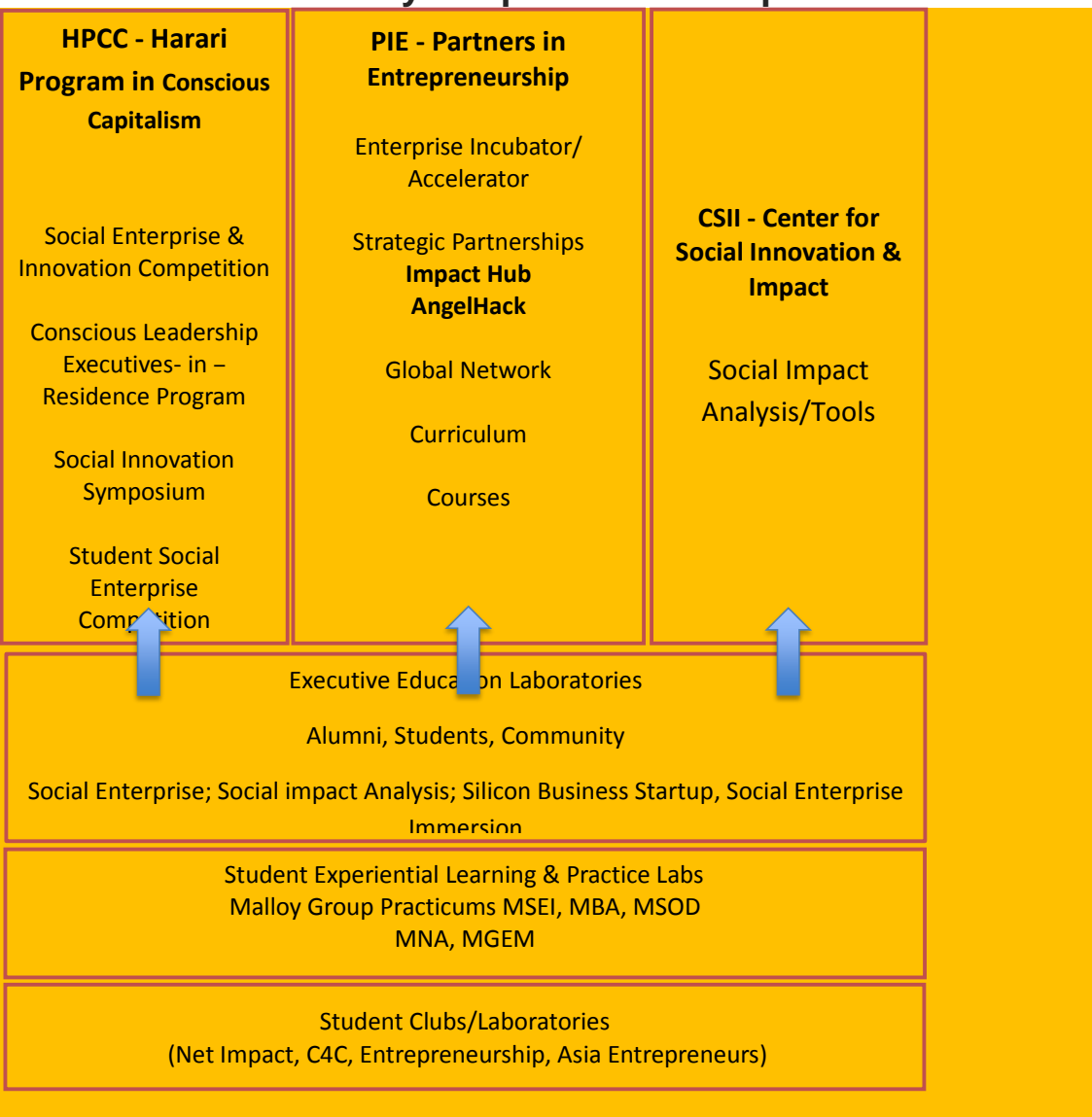
The **IGRE** provides a platform for integrating this three legged stool through the development of the **PIE** Program; the **HPCC** and the Center for Social Innovation & Impact (**CSII**). conscious leadership and conscious capitalism. In order to be credible in the mapping of the university's tagline "Change the World from Here" SOM must differentiate among: Future and current students, alumni, donors, employers of graduating students, faculty/staff, the local business community, and other stakeholders.

*The Institute's goal is "...to successfully establish the USF SOM as a leader in Globally Responsible Enterprise with a strategic focus in social innovation, beyond just a marketing message. This Globally Responsible Enterprise would need to be integrated into the very fabric of SOM and incorporated into its identity, culture and values by being: (1) mission centered; (2) institutionally embedded and (3) curricula driven.*

(See IGRE diagram next page.)



## Institute for Globally Responsible Enterprise



SOM faculty and administration have a deep commitment to social initiatives. Many faculty teach ethics in the classroom; many are doing research in the social responsibility area; many are committed to sustainability practices theoretically in their research and in practice.

Given SOM's commitment to social impact, innovation and conscious capitalism across its many graduate programs, but most particularly in its Masters in Nonprofit Administration, Masters in Public Administration, Masters in Global Entrepreneurial Management, and its Masters in Business Administration, there is already a strong base of courses, faculty expertise and research that can be better coalesced into a common institute with an emphasis on social innovation, leadership and impact. A key component of such an initiative includes partnering with those in local community that have expertise in social responsible business practices and business development such as: Impact Hub, Kiva, and Just Business.

As we build these different component parts of the Institute for Globally Responsible Enterprise ( PIE:HPCC:CSII) we can start this effort at 101 Howard Street site establishing a social innovation activity working space for Executives In Residence, social startups, partnerships with the Impact Hub and AngelHack that can catapult SOM's global reach towards the social good, practicum workspace for graduate students within SOM's master's degrees in: business, global entrepreneurial management, non-profit administration advancing the research and practice of responsible enterprise development on a global scale.

## **APPENDIX 18**

### **The Ignatian Management Exercises**



## The Ignatian Management Exercises

Prepared by Richard W. Stackman, Ph.D., and Kimberly Rae Connor, Ph.D.

### Overview

*The New York Times* columnist David Brooks recently wrote:

Universities are more professional and glittering than ever, but in some ways there is emptiness deep down. Students are taught how to do things, but many are not forced to reflect on why they should do them or what we are here for. They are given many career options, but they are on their own when it comes to developing criteria to determine which vocation would lead to the fullest life. ... In short, for the past many decades colleges narrowed down to focus on professional academic disciplines, but now there are a series of forces leading them to widen out so that they leave a mark on the full human being (2015).

Brooks (2015) challenges universities to create opportunities for students to reveal moral options, foster transcendent experiences, investigate current loves and teach new things to love, and apply the humanities, mirroring the sentiment of Rev. Peter-Hans Kolvenbach, S.J., the then Superior General of the Society of Jesus, who stated in 2000:

Tomorrow's 'whole person' cannot be whole without an educated awareness of society and culture with which to contribute socially, generously, in the real world.

**Jesuit universities are known for educating the “whole person” through curricula and co-curricula offerings. With this in mind, the School of Management is in a unique position, given its Jesuit tradition, to respectfully emulate the *Spiritual Exercises*, as envisioned by Ignatius Loyola, to prepare its students at both the undergraduate and graduate levels to be better leaders and, thus, better global citizens. The introduction of the Ignatian Management Exercises will complement the School’s curricula and its other co-curricular activities<sup>1</sup>.**

Management, as a profession, should be concerned with professional values about the *why* and *what* of managerial action, not just the *how* (Pfeffer, 2005). Moral or ethical considerations are important in the practice of management (Ghoshal, 2005).

The choosing to study at USF in the School of Management entails more than the location, tradition, reputation, and cost. Students should not merely receive an education in business/management. In addition, students should be prepared to face the world as a person of intention grounded in an ethical perspective informed by the centuries proven technique of spiritual direction designed by St. Ignatius. Students can acquire other ethical frameworks and character building tasks at other universities, but the distinction here is the *Ignatian* model, built on the development of discernment as a life-long habit.

Bryon (2011) addresses the “specifically Jesuit dimension of leadership” which involves “... humility, the notion of ‘*magis*’, and the process of ‘discernment’” (p. 9). He uses the word “humbition” – defined as “... a blend of humility and ambition that relies on power of persuasion rather than formal authority” (2011: 12) -- as a term understandable to the secular world but one that still retains the characteristically Jesuit approach of humility, *magis*, and discernment.

Finally, important and distinctive about Jesuit education: It recognizes the whole person’s context as s/he comes to the experience of education, reflects on what s/he has learned, acts on her informed intentions, and evaluates his performance in a *magis*-driven desire to improve and accomplish more for others.

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<sup>1</sup>The original impetus for the Ignatian Management Exercises is the undergraduate co-curricular Professional Edge program.

### The *Spiritual Exercises* and Discernment

The *Spiritual Exercises* prepare individuals to participate in the transformation of the world (Barry, 2008). They involve the examination of the conscious through prayer, meditation and contemplation by an individual so that s/he is aware of his/her own dignity and the “presence of God in all people and all things” (Barry, 2008: 124). The *Spiritual Exercises* are a means to enhance reflection and are predicated on Ignatius Loyola’s greater concern for thoughts misleading the emotions rather than vice versa (Moberg & Calkins, 2001). Central to the *Spiritual Exercises* are imagination and discernment. The *Spiritual Exercises* are designed to touch the affective domain and teach people to stay in touch with their dreams (Fowler, 2008).

Discernment focuses on identifying a decision that we face or the issue we need to resolve (Au & Au, 2008). Through discernment, individuals strive for Ignatian indifference, “... a state of inner freedom, openness, and balance that allows us to beforehand not to incline more toward one option than to another but to allow our preference [to] be shaped by the single criterion of what will enhance our ability to love God and to embody that love for others” (Au & Au, 2008: 204). It is a time to contemplate and to dialogue with those who will be intimately affected by the decision being made. To that end, as Au and Au (2008: 207) note, we are then able to live out the decision with “courage, hope and trust”, though tinged with some uncertainty.

The goal of the *Spiritual Exercises* is an active life *and* a contemplative life (Gaffney, 2008) where the head, heart, and hand work in concert together. Ultimately, one has enlarged and deepened his/her grasp of the truth (Newton, 2008).

### The Ignatian Management Exercises: The Design

The marrying of the head-heart-hand through a reflective practice is at the core of the Ignatian Management Exercises. This practice, like the *Spiritual Exercises*, will be guided by questions. Bill Torbert (1994) in his article, “The good life: Good money, good work, good friends, good questions”, contends “the good life” begins with questions, as good questions never die. Questions connect us to the wider universe. They grow relationships, vocations, and value/wealth. They are at the very heart of our understanding to what guides our life (Torbert, 1994). Luckily, there is no shortage of resources to aid in the development of the questions for the Ignatian Management Exercises (see the “Appendix” for two examples: Badarraco, 2006; Abela & Capizzi, 2014).

Stressing reflection and meditation, thus creating a “spiritual retreat” (Byron, 2011), students will work their way through six segments – an overview, four modules, and closure/integration – guided by assigned readings, activities, and questions. Student will link reflection and learning from experience (past, present and future). There is an inherent logic to following the path set forth by St. Ignatius because of the spiritual logic of moving from self to society to world, or as it is framed here in two corresponding ways: (1) individual, team, organization, and society; and (2) synchronicity, solidarity, subsidiarity, and sustainability.<sup>2</sup>

Central to the Ignatian Management Exercises is the integration of the levels of analysis critical to management education – individual, team, organization, and society. The “care of” each level in relation to the others will be applied via the four pillars of leadership – self-awareness, love, ingenuity, and heroism – as outlined by Chris Lowney in his book *Heroic Leadership* (2003). (See the table “Structure of The Ignatian Management Exercises” for a graphic representation.)

Key outcomes from participation in the Ignatian Management Exercises (see “The Ignatian Management Exercises Objectives” below) are character development<sup>3</sup> and the synthesis of multi-disciplinary (informed) knowledge into inter-disciplinary (integrated) understanding. Mindfulness, through meditation and reflection, is an important component of the Ignatian Management Exercises for students to develop empathy and humility.

The Ignatian Management Exercises, as designed, can be integrated into any of the School’s programs as a required curricular element (with attached credits), a required co-curricular option, or an optional co-curricular activity.<sup>4</sup> The Ignatian Management Exercises will be offered in a fully online format and developed using the Competency Assessment in Distributed Education (CADE) process developed

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<sup>2</sup>The terms – synchronicity, solidarity, subsidiarity, and sustainability – are also used in the paper by Tavanti (2012).

<sup>3</sup>Dr. Thomas Wright, a distinguished professor of leadership and management at Fordham University, is spearheading a research group on character of like-minded scholars at other Jesuit universities. Besides USF, faculty at Gonzaga, Santa Clara, and Loyola Marymount have expressed an interest in participating. The Ignatian Management Exercises, as designed, would be an integral piece to this research.

<sup>4</sup>For example, the Ignatian Management Exercises could be a two-credit elective in the B.S. in Management program or the MBA program. Ideally, the Ignatian Management Exercises would be a required co-curricular element of the undergraduate Professional Edge program.

by JesuitNet. (See “Appendix” for a brief overview of the CADE process.) Students’ reflections will be recorded via uploaded papers or videos to Canvas.

#### The Ignatian Management Exercises Objectives

The objectives of the Ignatian Management Exercises emphasize each participant’s ability to:

- Appreciate the Jesuit educational qualities of (1) a passion for quality and excellence and (2) a preoccupation with questions of ethics, justice, and values in both one’s personal and professional lives (Mitchell, 2008).
- Integrate self-awareness, love, ingenuity, and heroism into his/her daily life across the four levels of analysis – individual, team, organization, and society – and the principles of synchronicity, solidarity, subsidiarity, and sustainability.
- Enhance critical thinking skills as demonstrated through speaking and writing.
- Make informed decisions through discernment.
- Develop one’s understanding of character, including his/her own.
- Build organizations with purpose.
- Incorporate an informed (multi-disciplinary) knowledge into an integrated (inter-disciplinary) understanding.
- Value the importance of life-long learning.

#### Integrating the “Levels of Analysis”

Central to the Ignatian Management Exercises is how students negotiate and integrate iteratively the levels of analysis – individual, team, organization, and society – in their development as people of character.

Understanding character and character development is essential to the ultimate success of the Ignatian Management Exercises. Character is defined as “...those interpenetrable and habitual qualities within individuals and applicable to organizations that both constrain and lead them to desire and pursue personal and societal good” (Wright & Goodstein, 2007: 928). A *character-based leader* is “someone with the necessary self-control (moral discipline) to selflessly act on his or her volition (moral autonomy) to inspire, sustain, and transform the attitudes of and beliefs of both self and followers” (Wright & Lauer, 2013: 30). Implied in the character-based leader description is this: It is a character-based leader who can (and should) positively impact other individuals, the team, the organization, and society. When one acts in a pro-social way, the result is the individual and everyone else are better (Lin & Hanauer, 2011). “*True self interest is mutual interest*.” The best way to improve your likelihood of surviving and thriving is to make sure those around you survive and thrive” (Lin & Hanauer, 2011: 39).

This focus beyond oneself (individual) to the greater whole (society) is captured in the works of Katz and Bradley (2013) and Liu and Hanauer (2011). In the *Metropolitan Revolution*, Katz and Bradley (2013: 13) argue for the remaking of urban and suburban places into livable, quality, affordable, sustainable communities that offer more residential, transport, and work options to firms and families alike. In blending ecosystem and enterprise, “multiple public, private and civic actors are empowered to look across challenges, naturally connecting the dots between related issues” (Katz & Bradley, 2013: 8), where these related issues reflect “wicked problems”.

For Lin and Hanauer (2011), people are interdependent creators of a dynamic world via the interlocking realms of citizenship, economy and government. They note that there is no such thing as a self-made person and the pose several pointed questions (2011: 41) to be incorporated in the Ignatian Management Exercises:

- What does it mean to be a citizen, to live in public, to be a contributing and effective member of a community?
- What is the purpose of an economy, and how, in a free society, can the market work to serve all people?
- What is government for?

#### Final Comments

While the Ignatian Management Exercises are not envisioned to be a capstone course, the intent for their development reflects a recent call for a capstone course:

... where students explicitly focus on the purpose of business and the responsibility of management. Such a course could reinforce the mission and values of Jesuit schools of business by forcing an extended debate between shareholder value perspective, contemporary management challenges to that perspective, and the long tradition of Catholic Social Thought. Such an interdisciplinary capstone course ... has the potential to reinforce the mission of our schools and to play a critical role in the formation of our graduates to be men and women with and for others throughout their business careers” (Porth & McCall: 2015: 39).

Additionally, as designed, the Ignatian Management Exercises should “permeate” the entire school. The Ignatian Management Exercises address comments expressed by the late C.K. Prahalad at the Ross School of Business (Michigan), a preeminent scholar in eradicating poverty via a “bottom of the pyramid” focus:

I think business school should not become a sophisticated trade school. ... I think the difference between a trade school and a school for educating people is adding the moral and ethical component. If you had all the education and no moral and ethical component, it's just a trade school. It's not about just teaching a class in ethics, but it must permeate the entire being of the school because moral questions and ethical questions don't come labeled as such. 'I have a moral question today' is not how we cope with our lives. It comes all the time; we have to make choices. (2005: 173).

The Ignatian Management Exercises are a work in progress, and they will remain so long after their launch. The Ignatian Management Exercises are informed by the Spiritual Exercises, which are not a get on and get off approach or check-the-box endeavor. Instead, they apply the Ignatian Pedagogical Paradigm of context, experience, action, reflection, and evaluation in a carousel model.

We foresee the Ignatian Management Exercises as a potential funding opportunity where a donor (or donors) would underwrite future expenses associated with offering the Ignatian Management Exercises to both the undergraduate and graduate student populations.

Additionally, given the online format, the Ignatian Management Exercises could be offered to School of Management alumni (for a fee) or to the other schools and colleges at USF as well as other Jesuit universities.

Table: Structure of The Ignatian Management Exercises

<b>Overview</b> <p>From Pope Francis: "Business is a noble vocation, directed to producing wealth and improving the world. It can be a fruitful source of prosperity for the area in which it operates, especially if it sees the creation of jobs as an essential part of its service to the common good" (<i>Laudato Si'</i>, 2015: 129).</p> <p>Potential readings: Barry, <i>What Are Spiritual Exercises?</i>; Lowney, <i>Heroic Leadership</i>; Torbert, <i>The Good Life</i>.</p>			
← Individual →	← Team →	← Organization →	← Society →
<b>Module: Self-Awareness</b> <p>Understands one's strengths, weaknesses, values and worldview.</p> <p>—</p> <p>We form our character in defining moments because we commit to irreversible courses of action that shape our personal professional identities. We reveal something that had been only partially known (Badaracco, 1998: 116).</p> <p>Potential readings: Badaracco, <i>The Discipline of Building Character</i>; Wright &amp; Lauer, <i>What Is Character and Why Does It Really Matter</i>.</p>	<b>Module: Love</b> <p>Engages others with a positive, loving attitude.</p> <p>—</p> <p>Students must let the gritty reality of this world into their lives, so they can learn to feel it, think about it critically, respond to [the world's] suffering and engage it constructively (Kolvenbach, 2000).</p> <p>Potential readings: Boyle, <i>Tattoos on the Heart</i>.</p>	<b>Module: Ingenuity</b> <p>Confidently innovates and adapts to embrace a changing world.</p> <p>—</p> <p>Organizations should have an intentional and broadened purpose with a clear understanding that "...business is a part of society and not apart from society" and businesses should consider their possible impact (Hollensbe et al., 2014: 1228-1229). Organizations with purpose develop people who value: dignity, solidarity, plurality, subsidiarity, reciprocity, and sustainability (see "Appendix" for terminology definitions).</p> <p>Potential readings: Hollensbe et al., <i>Organizations with Purpose</i>.</p>	<b>Module: Heroism</b> <p>Energizes themselves and others through heroic ambitions.</p> <p>—</p> <p>Individuals should find themselves in moments that are the direct result of the work, sacrifice, and passion to be disturbers of an unjust peace (Jordan, 2015).</p> <p>Potential readings: Readings: Katz &amp; Bradley, <i>The Metropolitan Revolution</i>; Liu &amp; Hanauer, <i>Gardens of Democracy</i>; Wexler, <i>Exploring the Moral Dimension of Wicked Problems</i>.</p>
← Synchronicity →	← Solidarity →	← Subsidiarity →	← Sustainability →
<b>Closure—One's Future/Integration</b> <p>From David Brooks, reflecting on Edmund Burke: "[Leadership] begins with a warm gratitude toward that which you have inherited and fervent wish to steward it well. It is propelled by an ardent moral imagination, a vision of a good society that can't be realized in one lifetime. It is informed by seasoned affections, a love of the way certain people concretely are and a desire to give all a chance to live at their highest level" (2014).</p> <p>From Chris Lowney (2003): We are leaders, leading all the time, well or poorly. Leadership is about who you are as much as what you do. Leadership is not an act but one's life, a way of living. One <i>never</i> completes the task of becoming a leader.</p> <p>Leadership is an ongoing journey where leaders will be tested again and again. Leaders will lose their way. They need to be able to find their way back. Therefore, continuing to learn is the sine qua non. One's education and life experiences keep us informed (multi-disciplinarily) but it is our responsibility to integrate this knowledge (inter-disciplinary).</p>			



## APPENDIX

### Question from *Questions of Character* (Badaracco, 2006).

**Do I have a good dream?** Am I dreaming with my eyes wide open? Which dreams will you abandon? Are these really my dreams? My dreams are our dreams?

**How flexible is my moral code?** How deep are the emotional roots of my moral code? What do my failures tell me? How have I handled ethical surprises? Do I have the courage to reconsider? Can I crystallize my convictions?

**Are my role models unsettling?** Does my role model meet deep needs? What does my role model elicit from me? Does my role model offer gifts of discomfort? Do I have down-to-earth role models? Do I have “will fix” role models?

**Do I really care?** Am I deeply accountable to myself? Am I deeply accountable to others? Am I realistic about the conditions? Is there sugar?

**Am I ready to take responsibility?** Do I really feel my responsibilities? Can I look at the reality around me? Can I take small steps forward? Can I take responsibility?

**Can I resist the flow of success?** What do I see around me? Am I a little too nice? Am I willing to underachieve? Do I know why and feel why?

**How well do I combine principles and pragmatism?** Do I undervalue gentle humor? Can I dramatize? Can I ask for understanding? Can I make others struggle?

**What is sound reflection?** Can I shift perspectives? Is my reflection messy enough? Am I encouraging real dialogue? Love or passion? Do I hold the gods in awe?

### Questions from *A Catechism for Business* (Abela & Capizzi, 2014). (Note: This is a sample of the 114 questions in the book.)

**Economic Context:** Can unjust economic structures actually lead people to sin? How do we overcome unjust economic structures?

**Moral Dilemmas in Business:** Is it ever acceptable to do something immoral in business in order to achieve a greater good (e.g., prevent the company from going bankrupt and save thousands of jobs)?

**Financing and Investing:** Is the main purpose of a business to make profit? Is it morally acceptable to seek to maximize profit—in the sense of pursuing profit ahead of everything else?

**Taxes:** Is it morally acceptable to minimize the amount of taxes our firms must pay through offshore tax havens or other loopholes in the tax code?

**Compensation:** What is a “just wage”? Whose responsibility is it to see that a just wage is paid? What compensation levels are appropriate for senior executives?

**Working Conditions:** What obligations do we have to ensure the health and safety of our employees as they do their work, beyond the legal (e.g., U.S. Occupational Safety and Health Act of 1970) requirements? Are we required to offer any kind of training and development opportunities to our staff if business success does not require it?

**Labor-Management Relations:** Do workers have a right to unionize? What should be the role of labor unions?

**Hiring and Firing:** Is it morally acceptable to lay off staff solely for the purposes of increasing profits and/or improving the company’s share price? Is there anything wrong with laying off people and replacing them with technology, if this will improve product quality and profits?

**Marketing and Sales:** Are there any moral limitations on what we can make and sell, or should we just let the free market decide?

**Advertising and Promotion:** Is it morally wrong to contribute to a culture of consumerism? Is there any particular moral sensitivity we should have when advertising in developing countries?

**Sales:** Is it wrong to target our products and services to certain groups of poorer or more vulnerable customers, where their relatively lower sophistication, lower education levels, and perhaps inability to get credit make them “captive”, and therefore more profitable, customers for us?

**Manufacturing:** Are there any moral obligations regarding what level of quality to maintain in the goods that we produce? Are there any moral obligations regarding the firm’s treatment of the environment, beyond following the law? Is it morally acceptable to invest in technology that improves our treatment of the environment, if this is not required by law, does not improve our market position, and reduces the profits that would otherwise go to the firm’s owners?

**International Business:** May we subcontract our manufacturing to offshore manufacturers if there is some concern that they use child labor and/or maintain unsafe conditions for their workers? What should we do if the only way to remain competitive is to subcontract our manufacturing offshore to customers who are known to provide unsafe conditions for their workers? To what extent should we focus our

efforts on improving the lot of the workers we employ in developing countries, if this comes at the expense of our profits? What consideration should we address when marketing consumer goods in developing countries.

**Definitions<sup>5</sup> from Hollensbe et al. (2014)**

**Dignity:** viewing each person as a someone, not a something.

**Solidarity:** recognizing that other people matter.

**Plurality:** valuing diversity and building bridges and not excluding those that think and act differently.

**Subsidiarity:** exercising freedom with responsibility; promoting accountability at all levels by proper delegation of decision making; and ensuring employees have a voice in their work, thus fostering innovation, creativity, and a sense of shared responsibility.

**Reciprocity:** building trust and trusted relationships, which provide mutual benefit.

**Sustainability:** being stewards of people, values, and resources; seeking to replace what we use and repair what we damage; and striving to leave the planet in a better condition than that in which we found it.

**CADE Process**

**Thinking about Knowledge and Content.**

Level Three (Strategic Knowledge). What complex thinking strategies and processes will students need to develop?

Level Two (Procedural Knowledge). What procedures, techniques or methods will be taught?

Level One (Factual Knowledge). What facts, details, concepts, and terminology will students become familiar with in your course?

**Evidence of Student Mastery**

Identify the evidence /deliverables (student thinking or behavior) that will indicate student mastery of each of the strategic knowledge competencies.

**Evidence Analysis**

Describe how student mastery will be assessed.

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<sup>5</sup>The terms – synchronicity, solidarity, subsidiarity, and sustainability – are also used in the paper by Tavanti (2012).

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## Acknowledgements

We thank our colleague, Marco Tavanti, for his helpful insights in the development of this proposal.

## **APPENDIX 19**

### **School of Mangement Gifts and Pledges, FY 2012 to FY 2016**

Gifts to the USF School of Management, FY 2012 to FY 2016

Category	Designation	GIFTS FY2012	PLEDGE PAYMENTS FY2012	GIFTS FY2013	PLEDGE PAYMENTS FY2013	GIFTS FY2014	PLEDGE PAYMENTS FY2014	GIFTS FY2015	PLEDGE PAYMENTS FY2015	GIFTS FY2016	PLEDGE PAYMENTS FY2016
ALUMNI	Buildings	\$0.00	\$12,500.00	\$915.50	\$11,950.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
ALUMNI	Endowment	\$22,125.00	\$1,166.70	\$23,525.00	\$10,000.00	\$16,645.00	\$0.00	\$29,804.68	\$0.00	\$8,400.00	\$0.00
	Other										
ALUMNI	Restricted	\$86,488.18	\$54,315.16	\$69,273.37	\$47,581.70	\$60,394.47	\$12,257.30	\$57,941.90	\$6,913.33	\$12,157.50	\$1,930.00
ALUMNI	Scholarship	\$30,616.00	\$18,226.00	\$19,004.00	\$21,621.80	\$5,165.00	\$13,600.95	\$11,660.32	\$5,656.55	\$1,700.00	\$10,361.00
CORPORATE											
MATCHING	Endowment	\$12,500.00	\$0.00	\$2,725.00	\$0.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$1,700.00	\$0.00
CORPORATE	Other										
MATCHING	Restricted	\$28,982.96	\$5,950.00	\$15,521.25	\$0.00	\$26,980.43	\$0.00	\$8,605.25	\$225.00	\$11,837.42	\$2,500.00
CORPORATE											
MATCHING	Scholarship	\$4,724.96	\$0.00	\$774.99	\$0.00	\$700.00	\$0.00	\$250.00	\$0.00	\$0.00	\$0.00
CORPORATIONS	Buildings	\$0.00	\$5,000.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
CORPORATIONS	Endowment	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Other										
CORPORATIONS	Restricted	\$32,830.00	\$305.00	\$28,260.00	\$455.00	\$10,550.00	\$300.00	\$75,699.60	\$0.00	\$7,000.00	\$0.00
CORPORATIONS	Scholarship	\$0.00	\$2,675.00	\$3,010.00	\$525.00	\$0.00	\$100.00	\$8,001.00	\$100.00	\$200.00	\$1,000.00
FACULTY - STAFF	Endowment	\$0.00	\$300.00	\$0.00	\$300.00	\$0.00	\$550.02	\$375.00	\$840.04	\$500.00	\$430.02
	Other										
FACULTY - STAFF	Restricted	\$2,525.00	\$4,921.72	\$1,685.00	\$4,021.72	\$3,700.00	\$3,400.02	\$8,580.00	\$12,790.08	\$1,420.00	\$1,925.04
FACULTY - STAFF	Scholarship	\$0.00	\$500.00	\$0.00	\$275.00	\$0.00	\$350.00	\$4,532.00	\$0.00	\$0.00	\$0.00
FOUNDATIONS	Buildings	\$2,000.00	\$0.00	\$0.00	\$0.00	\$14,144.00	\$0.00	\$2,000.00	\$0.00	\$0.00	\$0.00
FOUNDATIONS	Endowment	\$0.00	\$0.00	\$0.00	\$0.00	\$15,179.40	\$0.00	\$250,000.00	\$0.00	\$15,252.00	\$0.00
	Other										
FOUNDATIONS	Restricted	\$10,000.00	\$0.00	\$21,804.90	\$0.00	\$10,000.00	\$0.00	\$8,080.00	\$0.00	\$15,000.00	\$0.00
FOUNDATIONS	Scholarship	\$40,000.00	\$0.00	\$30,000.00	\$0.00	\$35,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FRIENDS	Endowment	\$1,650.00	\$0.00	\$0.00	\$0.00	\$75,500.00	\$0.00	\$15,435.00	\$0.00	\$10,000.00	\$0.00
	Other										
FRIENDS	Restricted	\$4,713.00	\$905.00	\$5,685.00	\$29,000.00	\$8,400.00	\$0.00	\$5,770.00	\$0.00	\$1,002,025.00	\$0.00
FRIENDS	Scholarship	\$2,225.00	\$50.00	\$3,100.00	\$0.00	\$2,000.00	\$0.00	\$2,500.01	\$0.00	\$0.00	\$0.00
OTHER	Endowment	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Other										
OTHER	Restricted	\$0.00	\$0.00	\$12,900.00	\$0.00	\$2,100.00	\$0.00	\$5,312.50	\$0.00	\$5,600.00	\$0.00
OTHER	Scholarship	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,500.00	\$0.00	\$0.00	\$5,000.00
PARENT	Endowment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5.00	\$0.00	\$0.00	\$0.00
	Other										
PARENT	Restricted	\$15,150.00	\$0.00	\$1,800.00	\$25.00	\$31,400.00	\$125.00	\$21,857.25	\$0.00	\$250.00	\$0.00
PARENT	Scholarship	\$5,374.96	\$0.00	\$275.00	\$0.00	\$1,000.00	\$0.00	\$385.00	\$0.00	\$1,000.00	\$0.00

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REALIZED											
BEQUESTS	Endowment	\$0.00	\$0.00	\$3,044,399.59	\$3,878,055.00	\$524,658.70	\$3,000,000.00	\$0.00	\$0.00	\$217,672.14	\$0.00
REALIZED	Other										
BEQUESTS	Restricted	\$62,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
TRUSTEES	Buildings	\$0.00	\$1,000.00	\$0.00	\$1,100.00	\$0.00	\$1,200.00	\$0.00	\$1,200.00	\$0.00	\$600.00
TRUSTEES	Endowment	\$70,000.00	\$0.00	\$52,862.50	\$0.00	\$25,000.00	\$25,000.00	\$50,000.00	\$0.00	\$0.00	\$0.00
	Other										
TRUSTEES	Restricted	\$57,000.00	\$6,000.00	\$26,000.00	\$0.00	\$36,000.00	\$11,000.00	\$11,000.00	\$5,016.90	\$11,000.00	\$0.00
TOTAL		\$491,905.06	\$113,814.58	\$3,363,521.10	\$4,009,910.72	\$929,517.00	\$3,067,883.29	\$580,294.51	\$32,741.90	\$1,322,714.06	\$23,746.06
	<b>FY2012 TOTAL</b>			<b>FY2013 TOTAL</b>		<b>FY2014 TOTAL</b>		<b>FY2015 TOTAL</b>		<b>FY2016 TOTAL</b>	
		<b>\$605,719.64</b>		<b>\$7,373,431.82</b>		<b>\$3,997,400.29</b>		<b>\$613,036.41</b>		<b>\$1,346,460.12</b>	

Category	Designation	FY2012 Pledge Amount	FY2012 Pledge Balance	FY2013 Pledge Amount	FY2013 Pledge Balance	FY2014 Pledge Amount	FY2014 Pledge Balance	FY2015 Pledge Amount	FY2015 Pledge Balance	FY2016 Pledge Amount	FY2016 Pledge Balance	
ALUMNI	Academic Divisions	\$22,706.07	\$1,420.00	\$34,720.00	\$15,000.00	\$9,175.00	\$2,460.00	\$4,463.33	\$500.00	\$2,750.00	\$1,650.00	Formatted: Indent: Left: -0.05"
ALUMNI	Other Restricted /											Formatted: Indent: Left: -0.05"
ALUMNI	Current Student	\$100.00	\$0.00	\$17,500.00	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05", Tab stops: 4.95", Left + 7.14", Left + 7.37", Left + Not at 5.5" + 7.94" + 8.19"
ALUMNI	Financial Aid Student	\$19,430.00	\$605.00	\$41,965.00	\$4,783.90	\$6,306.53	\$0.00	\$1,621.67	\$90.00	\$25,892.00	\$20,534.00	Formatted: Indent: Left: -0.05"
ALUMNI	Financial Aid Endowment	\$100,000.00	\$90,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05"
CORPORATIONS	Academic Divisions	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05"
CORPORATIONS	Student Financial Aid	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05", Right: -0.07"
FACULTY - STAFF	Academic Divisions	\$4,621.76	\$0.04	\$3,196.76	\$0.04	\$1,525.02	\$0.00	\$11,910.08	\$0.00	\$1,660.08	\$905.04	Formatted: Indent: Left: -0.05"
FACULTY - STAFF	Other Endowment	\$300.00	\$0.00	\$300.00	\$0.00	\$300.00	\$0.00	\$340.00	\$0.00	\$360.00	\$180.00	Formatted: Indent: Left: -0.05", Right: -0.24"
FACULTY - STAFF	Student Financial Aid	\$500.00	\$0.00	\$275.00	\$0.00	\$350.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05"
FACULTY - STAFF	Financial Aid Endowment	\$0.00	\$0.00	\$0.00	\$0.00	\$250.02	\$0.00	\$500.04	\$0.00	\$500.04	\$250.02	Formatted: Indent: Left: -0.05"
FRIENDS	Academic Divisions	\$905.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05"
FRIENDS	Other Restricted /											Formatted: Indent: Left: -0.05", Tab stops: 5.63", Left + Not at 6.25"
FRIENDS	Current Student	\$0.00	\$0.00	\$29,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05"
FRIENDS	Financial Aid Endowment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000,000.00	\$1,000,000.00	Formatted: Indent: Left: -0.05"
OTHER	Student Financial Aid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25,000.00	\$20,000.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05"
PARENT	Academic Divisions	\$0.00	\$0.00	\$25.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05"
TRUSTEES	Academic Divisions	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00	\$4,983.10	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05"
TRUSTEES	Faculty/Staff Comp Endow	\$0.00	\$0.00	\$0.00	\$0.00	\$25,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Formatted: Indent: Left: -0.05"
TOTAL		\$150,562.83	\$92,025.04	\$126,981.76	\$34,783.94	\$58,256.57	\$7,443.10	\$43,835.12	\$20,590.00	\$1,031,162.12	\$1,023,510.06	Formatted: Indent: Left: -0.05"

**APPENDIX 20**

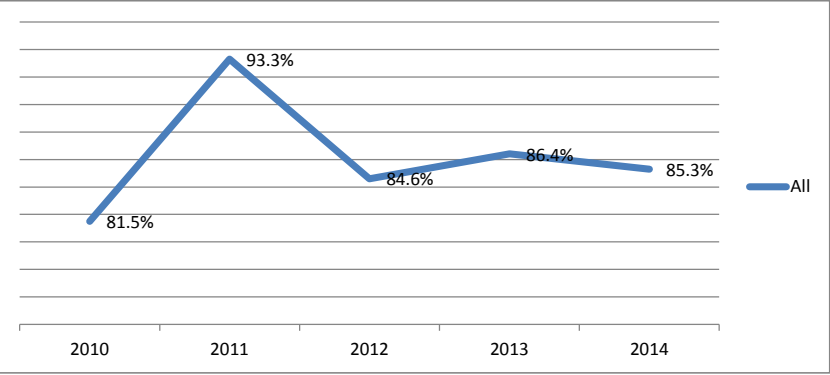
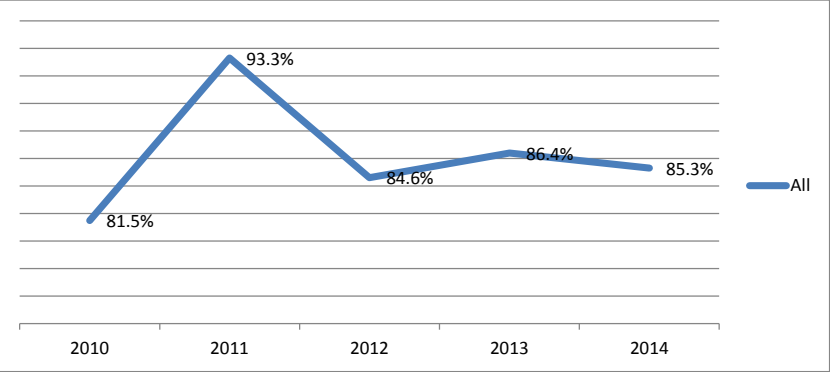
**Graduation and Retention Rates**



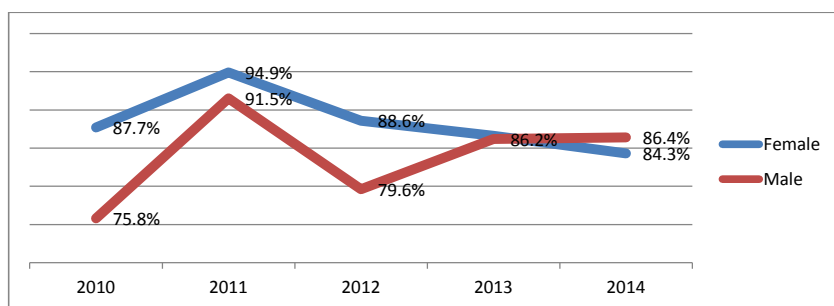
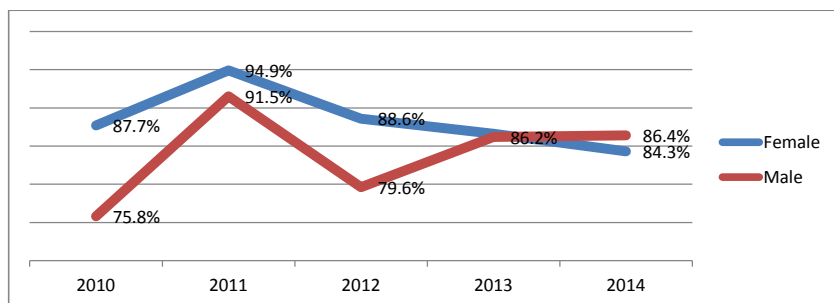
School of Management First-Time Freshman-to-Sophomore Retention Rates, All Students, and by Gender, Beginning Cohorts, Fall 2010 to 2014

Category	2010	2011	2012	2013	2014
All	81.5%	93.3%	84.6%	86.4%	85.3%
Female	87.7%	94.9%	88.6%	86.6%	84.3%
Male	75.8%	91.5%	79.6%	86.2%	86.4%

School of Management Freshman-to-Sophomore Retention Rates, Beginning Cohorts, 2010-2014, Overall



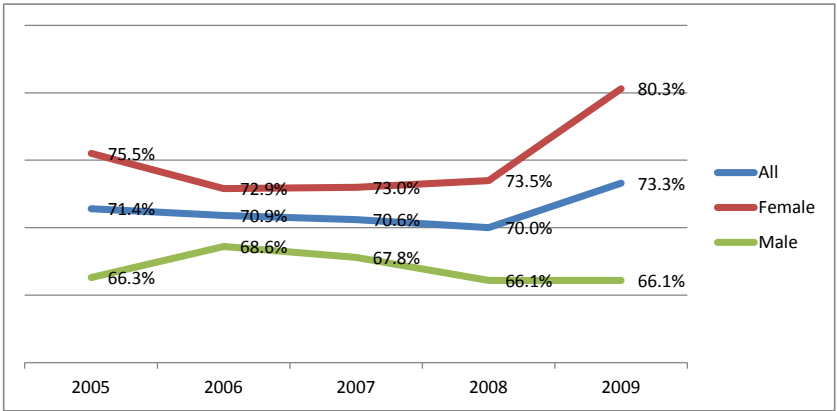
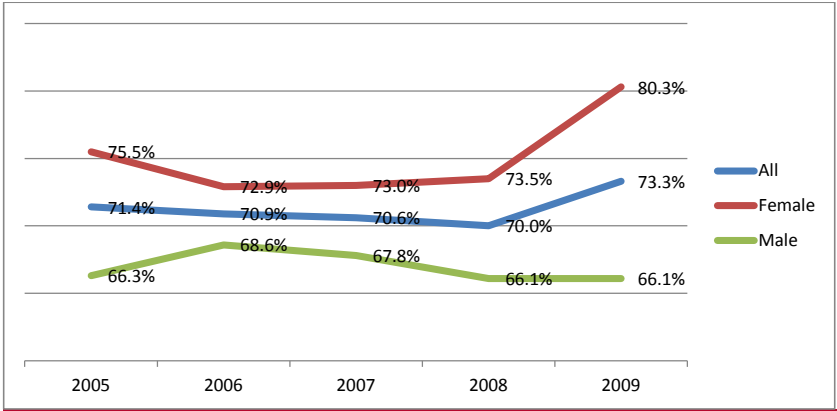
School of Management Freshman-to-Sophomore Retention Rates, Beginning Cohorts, 2010-2014, By Gender



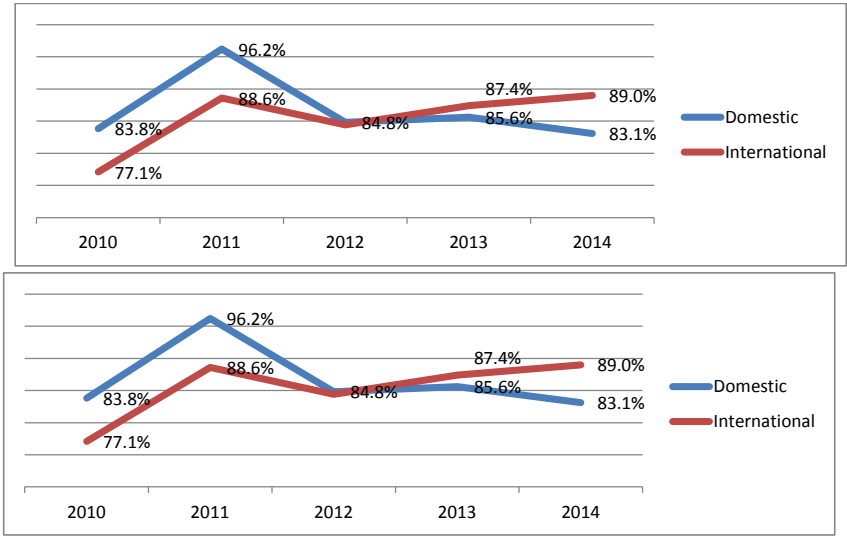
**School of Management First-Time Six-Year Graduation Rates, All Undergraduate Students, and by Gender, Beginning Cohorts, Fall 2005 to Fall 2009**

Category	2005	2006	2007	2008	2009
All	71.4%	70.9%	70.6%	70.0%	73.3%
Female	75.5%	72.9%	73%	73.5%	80.3%
Male	66.3%	68.6%	67.8%	66.1%	66.1%

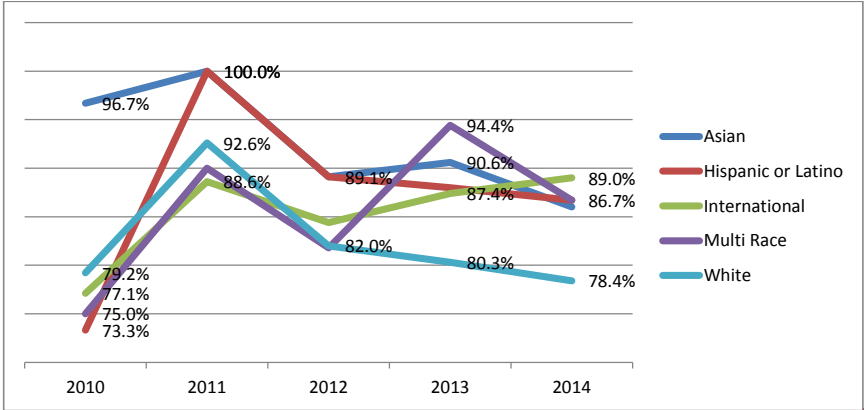
**School of Management First Time Six-Year Graduation Rates, All Undergraduate Students, and by Gender, Beginning Cohorts, Fall 2005 to Fall 2009**

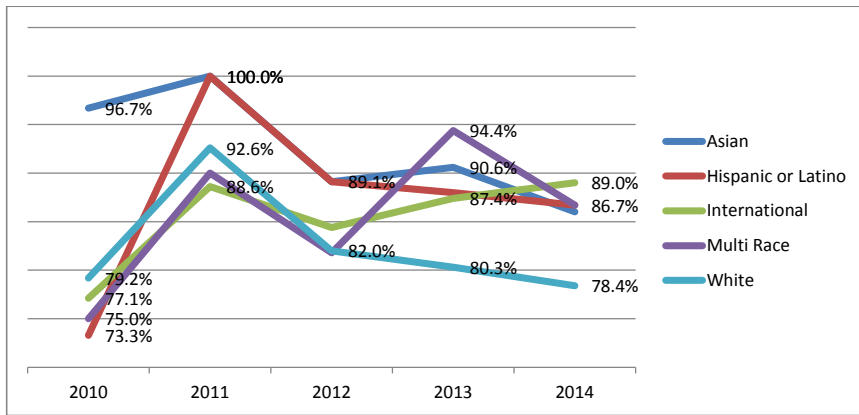


School of Management Freshman-to-Sophomore Retention Rates, Beginning Cohorts, 2010-2014, Domestic and International

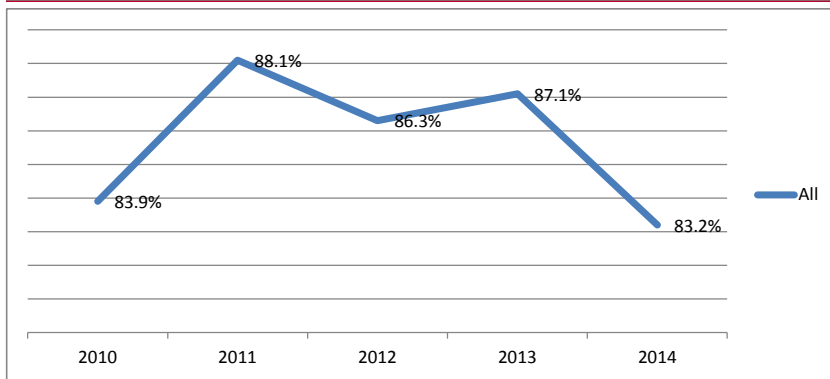
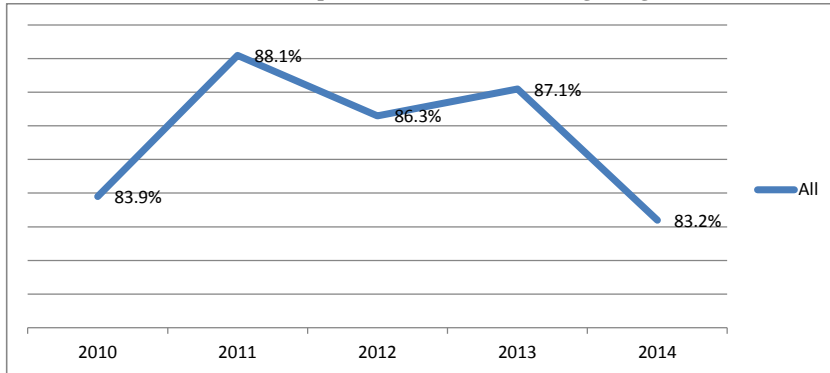


School of Management Freshman-to-Sophomore Retention Rates, Beginning Cohorts, 2010-2014, By Ethnicity

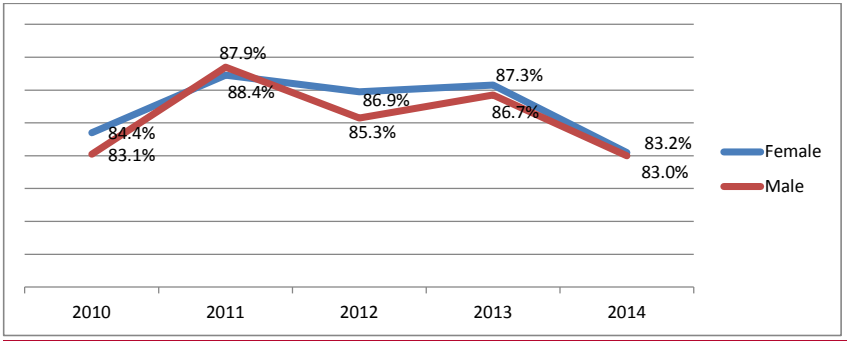
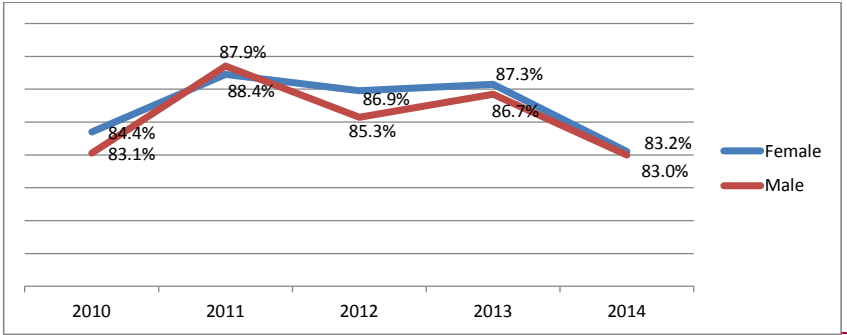




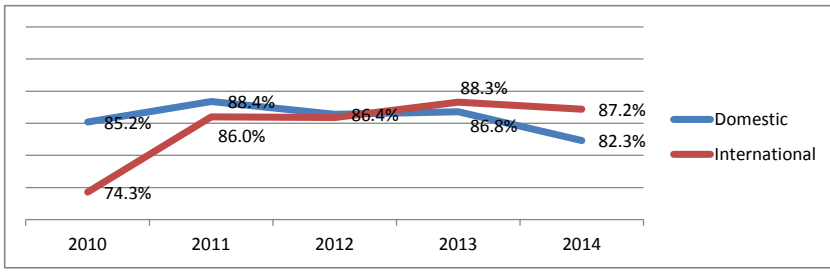
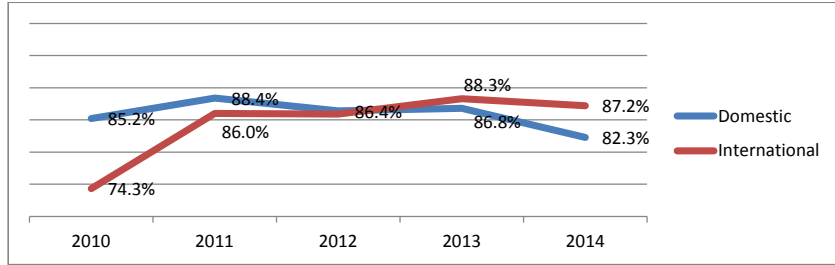
USF (All Schools) Freshman-to-Sophomore Retention Rates, Beginning Cohorts, 2010-2014, Overall



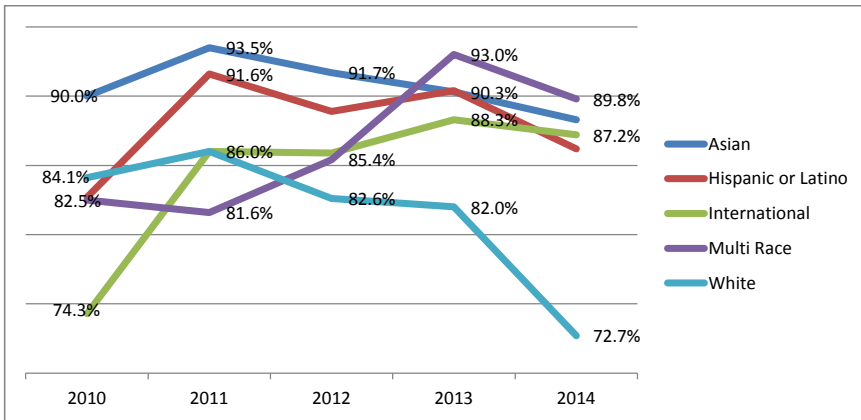
USF (All Schools) Freshman-to-Sophomore Retention Rates, Beginning Cohorts, 2010-2014, By Gender

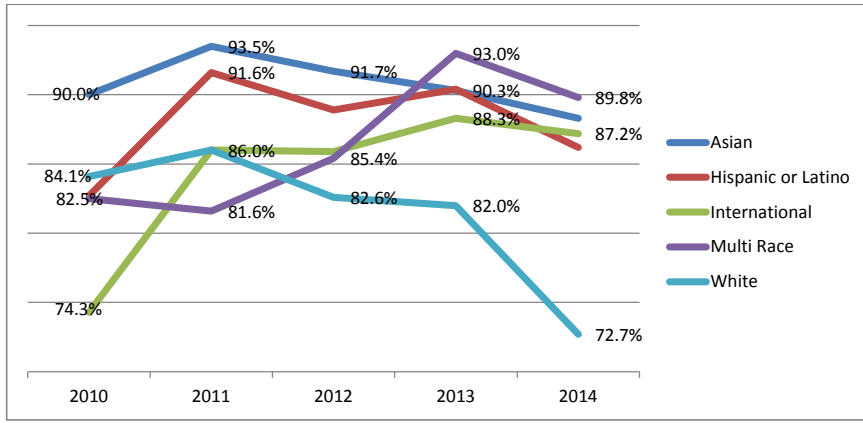


**USF (All Schools) Freshman-to-Sophomore Retention Rates, Beginning Cohorts, 2010-2014, Domestic and International**



USF (All Schools) Freshman-to-Sophomore Retention Rates, Beginning Cohorts, 2010-2014, By Ethnicity







**Table 9. Graduation Rates for School of Management Graduate Students by Program, Beginning Cohorts, 2009 to 2014**

Master's Degree Yearly Cohorts		2009-2010					2010-2011					2011-2012				
		Started	Within 2 <sup>nd</sup> year or less		Within 4 <sup>th</sup> year or less		Started	Within 2 <sup>nd</sup> year or less		Within 4 <sup>th</sup> year or less		Started	Within 2 <sup>nd</sup> year or less		Within 4 <sup>th</sup> year or less	
			Grad uated	% Grad	Grad uated	% Grad		Grad uated	% Grad	Grad uated	% Grad		Grad uated	% Grad	Gradu ated	% Grad
Masters of Business Administration (MBA) (includes Intensive MBA)	Full Time	99	83	84%	94	95%	64	55	86%	62	97%	68	58	85%	63	93%
	Part Time	59	24	41%	55	93%	66	31	47%	60	91%	31	11	35%	29	94%
MBA for Executives (EMBA)		38	37	97%	38	100%	33	30	91%	30	91%	21	20	95%	20	95%
Juris Doctor/MBA (JD/MBA)		6	0	0%	6	100%	#N/A	#N/A		#N/A		1	0	0%	1	100%
Master of Global Entrepreneursh ip and Management (MGEM)		30	27	90%	27	90%	28	26	93%	26	93%	15	14	93%	14	93%
MS in Organization Development (MSOD)	On Cam pus	17	0	0%	9	53%	34	1	3%	32	94%	41	13	32%	36	88%
MS in Organization Development (MSOD)	Off Cam pus	32	2	6%	29	91%	20	0	0%	14	70%	17	0	0%	17	100%
MS in Financial Analysis (MSFA) & (MS AFA)		#N/A	#N/A		#N/A		#N/A	#N/A		#N/A		34	31	91%	31	91%

Master's Degree Yearly Cohorts		2012-2013					2013-2014				
		Started	Within 2 <sup>nd</sup> year or less		Within 4 <sup>th</sup> year or less		Started	Within 2 <sup>nd</sup> year or less		Within 4 <sup>th</sup> year or less	
			Graduated	% Grad	Graduated	% Grad		Graduated	% Grad	Graduated	% Grad
Masters of Business Administration (MBA) (includes Intensive MBA)	Full Time	43	34	79%	41	95%	55	47	85%	50	91%
	Part Time	41	13	32%	36	88%	#N/A	#N/A		#N/A	
MBA for Executives (EMBA)		9	8	89%	8	89%	14	13	93%	13	93%
Juris Doctor/MBA (JD/MBA)		1	0	0%	1	100%	#N/A	#N/A		#N/A	
Master of Global Entrepreneurship and Management (MGEM)		37	33	89%	33	89%	40	32	80%	32	80%
MS in Organization Development (MSOD)	On Campus	22	18	82%	20	91%	30	25	83%	26	87%
MS in Organization Development (MSOD)	Off Campus	20	16	80%	19	95%	22	16	73%	17	77%
MS in Financial Analysis (MSFA) & (MS AFA)		46	34	74%	38	83%	40	24	60%	29	73%

Note: Graduation rates, beginning with the 2012 and 2013 cohorts, will extend into future terms, so are not final.

**APPENDIX 21**

**Mission and Accreditation Summaries: Institution, School and BSBA  
Learning Goals Alignment**



UNIVERSITY OF  
SAN FRANCISCO

School of  
Management

## Mission and Accreditation Summaries

### Institution, School and BSBA Learning Goals Alignment

**UNIVERSITY OF SAN FRANCISCO.** The University will distinguish itself as a diverse, socially responsible learning community of high quality scholarship and academic rigor sustained by a faith that does justice. The University will draw from the cultural, intellectual and economic resources of the San Francisco Bay Area and its location on the Pacific Rim to enrich and strengthen its educational programs.

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**USF 2028.** Jesuit, Catholic tradition. Academic excellence. San Francisco location. Diversity. Global perspective.

**SCHOOL OF MANAGEMENT.**<sup>1</sup> The School of Management at the University of San Francisco is a catalyst for change in business, government and non-profit managerial practice. Through research and teaching that draws on the global diversity and entrepreneurial energy of our region, we educate students to build more productive and compassionate organizations. We value human dignity and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit.

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**AACSB.** Innovation. Impact. Engagement.

*General Skill Areas:*

1. Written and oral communication.
2. Ethical Understanding and reasoning.
3. Analytical thinking.
4. Information technology.
5. Interpersonal relations and teamwork.
6. Diverse/multicultural environments.
7. Reflective thinking.
8. Application of knowledge.

*General Business/Mgt. Knowledge Areas:*

- a. Social responsibility, including sustainability, and ethical behavior.
- b. Statistics, data analysis, and decision-making.
- c. Economic, political, regulatory, legal, technological, and social contexts of organizations in a global society.

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- d. Financial theories, analysis, reporting and markets.
  - e. Systems and processes, including planning/design, production/operations, supply chains, marketing, and distribution.
  - f. Group and individual behaviors in organizations and society.
- Specific areas of study related to concentrations, majors, or emphasis areas.*

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**WASC CORE COMPETENCES.** Communication (Oral and Written) [CO], Critical Thinking [CT], Information Literacy [IL], Quantitative Reasoning [QR].

<sup>1</sup>From [www.usfca.edu/management/about/mission\\_and\\_vision](http://www.usfca.edu/management/about/mission_and_vision)

#### USF Institutional Learning Outcomes and SOM Undergraduate Learning Goals and Objectives

USF Mission Statement	USF Institutional Learning Outcomes <sup>1</sup>	SOM Undergraduate Learning Goals and Objectives <sup>2</sup>
The core mission of the University of San Francisco is to promote learning in the Jesuit Catholic tradition. The University offers undergraduate, graduate, and professional students the knowledge and skills needed to succeed as persons and professionals, and the values and sensitivity necessary to be men and women for others.	<ul style="list-style-type: none"> <li>Students reflect on and analyze their attitudes, beliefs, values, and assumptions about diverse communities and cultures and contribute to the common good. [CT]</li> </ul>	<u>Ethical Leadership</u> (i) Leading and Managing—distinguish between leading and managing diverse individuals and teams in creating and sustaining organizational performance. (ii) Ethical and legal behavior, and social responsibility—recognize and analyze ethical, legal and social implications of management decisions and devise appropriate responses.
The University will distinguish itself as a diverse, socially responsible learning community of high quality scholarship and academic rigor sustained by a faith that does justice.	<ul style="list-style-type: none"> <li>Students explain and disciplinary concepts, practices, and ethics of their chosen academic discipline in diverse communities. [CT]</li> </ul>	<u>Ethical Leadership [goal listed previously]</u> a. Communication—effectively communicate orally and in writing using various mediums across unique situations.
The University will draw from the cultural, intellectual, and economic resources of the San Francisco Bay area and its location on the Pacific Rim to	<ul style="list-style-type: none"> <li>Students construct, interpret, analyze, and evaluate information and ideas derived from a multitude of sources. [CT; IL; QR]</li> <li>Students communicate effectively in written and oral forms to interact within</li> </ul>	<u>Innovative and Creative Decision-making</u> (iii) Create, analyze and integrate relevant quantitative and qualitative information to develop and evaluate management decisions. <u>Domain Concepts</u>

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enrich and strengthen its educational programs.

- their personal and professional communities. [CO]
- Students use technology to access and communicate information in their personal and professional lives. [CO; IL]
  - Students use multiple methods of inquiry and research processes to answer questions and solve problems. [CT; IL; QA]

- Accounting—attain financial literacy in the understanding and interpretation of financial statements of organizations.
- Finance—use financial information to assess economic value of real and financial assets, and make decisions to create value.
- Organizational Behavior and Theory—develop and leverage human and social capital in organizations.
- Technology and Logistics—grasp the core information technology concepts that enable organizational operation and understand how technology trends enable innovation.
- Marketing—produce specific marketing tools needed for product development, consumer communications, pricing and distribution channels.
- Strategy and Competitive Advantage—develop specific and actionable strategic options at different levels to enhance the organization's competitive position through rigorous analysis of the changes in its competitive environment, its industry/sector, and its internal resources.

- Students describe, analyze, and evaluate global interconnectedness in social, economic, environmental and political systems that shape diverse groups within the San Francisco Bay Area and the world. [CT]

#### Global Mindset

- Appreciate diversity and integrate cultural, economic, political, historical, geographic, and environmental perspectives in decision-making.
- Recognize the opportunities and challenges facing organizations operating in an increasingly global economy.

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<sup>1</sup>WASC Core Competencies addressed by each ILO provided within [brackets].

<sup>2</sup>SOM UG Learning Goals and Objectives apply to BSBA and BSM programs.

**APPENDIX 22**  
**Assurance of Learning Plans, By Program**

## **ASSURANCE OF LEARNING PLANS, BY PROGRAM**

### **Teaching Enhancements and Closing the Loop Activities**

#### **Undergraduate Programs**

##### **Bachelor of Science in Business Administration (BSBA)**

**Mission Statement:** The School of Management is a catalyst for change in business, government and non-profit managerial practices. Through research and teaching that draws on the global diversity and entrepreneurial energy of our region, we educate students to build more productive and compassionate organizations. We value human dignity and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit that combine to facilitate significant contributions by our graduates, students, faculty, and staff.

The Program Goals and associated learning outcomes for the BSBA are:

#### **Program Goal 1 - Ethical Leadership**

- **Learning Outcome: 01) Leading and Managing**  
Distinguish between leading and managing diverse individuals and groups in creating and sustaining organizational performance
- **Learning Outcome: 02) Ethical and legal behavior, and social responsibility**  
Recognize and analyze ethical, legal and social implications of management decisions and devise appropriate responses.
- **Learning Outcome: 03) Communication**  
Effectively communicate orally and in writing using various mediums across unique situations.

#### **Program Goal 2 - Innovative and Creative Decision-making**

- **Learning Outcome: 04) Quantitative and Qualitative Information**  
Create, analyze and integrate relevant quantitative and qualitative information to develop and evaluate management decisions.

#### **Program Goal 3 - Domain Concepts**

- **Learning Outcome: 05) Accounting**  
Attain financial literacy in the understanding and interpretation of financial statements of organizations.
- **Learning Outcome: 06) Finance**  
Use financial information to assess economic value of real and financial assets, and make decisions to create value.
- **Learning Outcome: 07) Organizational Behavior and Theory**  
Develop and leverage human and social capital in organizations.
- **Learning Outcome: 08) Technology and Logistics**  
Grasp the core information technology concepts that enable organizational operation and understand how technology trends enable innovation.
- **Learning Outcome: 09) Marketing**  
Produce specific marketing tools needed for product development, consumer communications, pricing and distribution channels.
- **Learning Outcome: 10) Strategy and Competitive Advantage**  
Develop specific and actionable strategic options at different levels to enhance the organization's competitive position through rigorous analysis of the changes in its competitive environment, its industry/sector, and its internal resources.

#### **Program Goal 4 - Global Mindset**



- **Learning Outcome: 11) Diversity and Integration**  
Appreciate diversity and integrate cultural, economic, political, historical, geographic, and environmental perspectives in decision-making.
- **Learning Outcome: 12) Global Economy**  
Recognize the opportunities and challenges facing organizations operating in an increasingly global economy.

Examples of teaching enhancements and closing the loop activities in the School of Management's core curriculum:

*MATH 106 – Business Statistics/BUS 204 – Quantitative Business Analysis* (this course maps to BSBA Learning Outcome #4 – Quantitative and Qualitative Information)

All business students are required to take *Bus 204 - Quantitative Business Analysis*. *Math 106 - Business Statistics* is its prerequisite.

In spring, 2011, several faculty members noticed students arriving in BUS 204 with weak Excel skills. Some of their statistics skills were also weak. In spring, 2012, a “pretest” was given the first day of class in several sections of BUS 204 to determine if the perception was accurate. The test verified weak Excel skills and the Math Department was contacted. A review revealed a high degree of variability in the content covered in different sections of Math 106. The Chair of the Math Department promised to rectify the situation.

Continuing pretests (which were updated to include statistical material as well as Excel) documented that the problem was not being rectified as fast as had been hoped. Results were sent to the Math Department each semester.

In the fall of 2013, Jennifer Chubb (Asst. Prof. of Math) began working on coordinating the course across sections. She applied for and received a grant from the Provost in spring 2014 to redesign the course to improve students' experience and better meet the needs of SOM. In addition, a liaison committee was established between faculty in Math and Business to maintain continued improvement in coordination between the two courses.

Changes to the course included renaming the course, creation of a uniform syllabus, adoption of a new text that fully incorporates Excel in the content and exercises, and the development and deployment of online Excel tutorial modules (including assessments) that all students in all sections are required to complete.

Prof. Chubb continues to be the primary “director” of the course. Assessing the impact of these changes is complicated since many students delay taking 204, but students now take the 204 Pretest at the end of the semester in Math 106 as well, and we anticipate that this will yield usable data next year to help close the loop.

In the fall of 2015, an honors section of Math 106 was created for students who have taken statistics in high school, ideally as an AP course. The new course covered the same statistics and Excel topics as the regular Math 106 class, but it also spent several weeks introducing students to the cutting-edge R programming language for statistics and analytics.

#### *BUS 301 – Business Law*

In response to the Comprehensive Business Exam (CBE) Business Law questions and the underperforming of some students, the faculty responsible for assessing its design and teaching have undertaken measures to improve student learning outcomes.

CBE Test Result Item – “Identify legal issues and legal risks in business decision making including the substantive areas of torts, contracts and sales law.” (This test item maps to BSBA Learning Outcome #2 - Recognize and analyze ethical, legal and social implications of management decisions and devise appropriate responses)

Actions Taken by Business Law Faculty

- Reviewed and considered expanding coverage of tort law. Shared and discussed adoption of additional judicial opinions in the course syllabi for all sections.
- Reviewed and considered expanding coverage of contract law. Shared and discussed adoption of additional judicial opinions in the course syllabi for all sections.
- Sales law is not covered in *BUS 301 - Business Law*, but is included in *BUS 311 -Advanced Business Law*, an elective course. This will remain unchanged in the current curriculum design.

CBE Test Result Item – “Demonstrate knowledge and understanding of the basic concepts of the legal system such as the elements of a contract.” (This test item maps to BSBA Learning Outcome #4 – Quantitative and Qualitative Information)

#### Actions Taken by Business Law Faculty

- Reviewed and discussed coverage of the basic concepts of the legal system, such as the elements of a contract.
- Shared specific topical coverage of all basic concepts of the legal system, along with suggestions for cases and articles to assign for each of the basic concepts.

#### *BUS 302 – Marketing Principles (previously Marketing Management)*

##### **Assessed 2011-2012 AY**

##### **Learning Goal 1:**

To develop each student’s Understanding of marketing fundamentals, including theory, tools and language, and the role of the discipline in society.

##### **Outcome 1a:**

Articulate the role of marketing in both profit oriented and non-profit organizations

##### **Outcome 1b:**

Demonstrate an understanding of the marketing mix and the interrelationships among its components (e.g. product, pricing, and communications), marketing terminology and application opportunities.

##### **Outcome 1c:**

Demonstrate an understanding of the marketing research process

As part of a larger final course exam, 97 students from three sections of Marketing Management (BUS -302) answered multiple-choice test questions identified as addressing Outcomes 1a and 1b. Students from two of the sections also answered questions that addressed Outcome 1c. For Outcome 1c, students from one section of Marketing Research (BUS 360) were asked to write an answer to one open-ended question as part of a larger final course exam.

##### **Outcome 1a & 1b:**

The students from all three sections of Marketing Management demonstrated an understanding of the role of marketing in both profit-oriented and nonprofit organizations answering on average 93.5% of related exam questions correctly. The students from all three sections of Marketing Management demonstrated an understanding of the marketing mix and the interrelationships among its components, marketing terminology and application opportunities. On average, they answered 89.5% of the questions correctly.

##### **Outcome 1c:**

The result of the open-ended question indicate that students need support in this area. Just 60 percent of the students from the Marketing Research sample met or exceeded the established performance benchmark goal. 40 percent of the students performed at the novice level. Students appear to struggle with being able to articulate the steps of the

research process. They confused steps with methods and often showed considerable weakness in demonstrating an understanding of how the steps are interrelated or why each step is critical to the process

*Course/Curriculum Improvements:*

- In the introductory marketing course, continue to reinforce a consumer-oriented perspective towards marketing (Outcome 1A)
- In the introductory marketing course, provide additional examples of marketing in for-profit and non-profit organizations (Outcome 1A)
- In the introductory marketing course, continue to strengthen an understanding of the marketing mix through appropriate examples and applications (Outcome 1B)
- In the introductory marketing course, allocate more class time to deepen students' understanding of the marketing research process (Outcome 1C)
- In the introductory marketing course, provide a clearer explanation of the importance of research objective setting (midterm question #18), supported through examples and applications (Outcome 1C)
- In the Marketing Research course, emphasize an articulation and understanding of the steps of the marketing research process and how they are interrelated by returning to the overall process throughout the course (Outcome 1C)
- In the Marketing Research course, highlight the steps and their rationale as students perform them in a research consultancy project (Outcome 1C)

*Improvements to AoL process/methods:*

- Assess students at the end of the marketing program and at different points of the program, not just at the beginning. Evaluation of student learning in an introductory business course (a core course for all business majors) is not an optimal approach if we are attempting to determine whether students have learned the concepts by the time they graduate. Also, an introductory course does not go deep enough into certain topics – such as Marketing Research.
- Outcome 1c will not be assessed in Marketing Management.
- The entire marketing department will evaluate each question of the assessment to determine appropriateness and alignment with the stated outcomes. Questions will be identified using consensus. This process will also be employed to ensure the rubric is an appropriate tool for evaluation of student answers.
- The raters for the Marketing Research assessment will work on inter-rater reliability. This involves reviewing and discussing a sample of student answers to arrive at agreement on evaluation of performance.
- Students will be evaluated using the Marketing Research assessment tool each semester.

*AoL learning initiatives:*

- In Marketing Management-
  - More time is spent discussing the distinction between marketing in nonprofit and for-profit organizations.
  - More time is spent discussing the importance of defining the business challenge or research question to be investigated. This includes a more in-depth *Tide* case.
  - More time is spent defining the three research methods: exploratory, descriptive, and causal.
  - After a discussion about course content in the Marketing program, the course title was changed to “Marketing Principles” to reflect the level of depth that is covered in this course.
- In Marketing Research-
  - Emphasis is placed on the rationale for decisions made during the research process.
  - Students are evaluated throughout the course on their ability to explain the research process. This is expected to enhance their understanding of the interrelationship of the steps.
  - Students are frequently asked to consider marketing research decision making/choices with the manager's decision problem and related research questions in mind. This brings a student's understanding of the process in close relationship with the purpose of the research.

### *BUS 304 – Management and Organizational Dynamics*

Management and Organizational Dynamics has a service-learning designation and provides students with an introduction to organizations. Recently, the faculty have responded to the following student desires for:

- more material on negotiation and more experiential exercises
- team configurations for classwork that differ from service-learning project teams
- taking a class field trip to learn about the history and neighborhoods in which community partner organizations are located.

Informal conversations with students after class meetings led to the realization that they desired more negotiation content. Class wide, oral reflections have suggested that students enjoyed experiential exercises and simulations. End of the semester, in-class feedback informed faculty that students occasionally desired to work in configurations other than their service-learning teams. Finally, visits from the community partners to class meetings provided the forum in which students advocated for taking a field trip as a class to learn more about the neighborhoods in which organizations were located.

In response to this feedback, faculty have made the following changes:

- whereas previous classes did one or two negotiation simulations, they now do two or three
- classes that formerly were 1/3-1/2 experiential are now 1/2 to 2/3 experiential
- where service-learning teams might have previously been the only team configuration in the class, students are now placed in randomized, ad hoc teams for in-class work, thereby presenting them with different opportunities to work with classmates (this maps to AACSB standards 9.1.5 – Interpersonal Relations and Teamwork; and 9.1.6 – Diverse and Multicultural Work Environment)
- one section of BUS 304 (Fall 2015) went on a social justice walking tour through the Leo T. McCarthy Center for Public Service and Common Good as part of a pilot program to expand the availability of neighborhood specific field trips (this maps to BSBA Learning Outcome #11 - Appreciate diversity and integrate cultural, economic, political, historical, geographic, and environmental perspectives in decision-making.)

The course coordinator has started organizing the BUS 304 faculty for the purposes of sharing resources and strengthening the course delivery across multiple sections. Out of these meetings, instructors were able to expand the number of experiential exercises incorporated into each section. Furthermore, there was a suggestion to “trade lectures,” whereby interested faculty could take their best content to colleagues’ classes. In this way, multiple sections of the course could be exposed to various faculty members’ strongest content areas. Although faculty are trying this only for the first time in Fall 2015, early indications suggest that students appreciate seeing different faculty and can intuit the passion that they bring to these guest teaching opportunities.

### *BUS 305 – Principles of Finance*

Assessments have shown that some students had difficulty in computing the Present Value (PV) and Future Value (FV) of a stream of uneven cash flows using the cash flow worksheet function to solve these problems. Students were not to calculate cash flows by hand but to use the cash flow worksheet function on their financial calculator instead to save time. The cash flow worksheet only computes the PV but not FV. Hence, if they need the FV, they need to take an additional step by treating the PV as one single cash flow and use it to compute the FV. Some failed to take this additional step. It could be related to whether the student reads the problem as an ordinary annuity or annuity due. Recommendation was to have more in class “Time Value of Money” examples that have cash flows appearing at the beginning of each period and have students compute the end of period future value after a certain time period, the ordinary annuity and annuity due problems. (This AoL assessment maps to the BSBA Learning Outcome #6 - Use financial information to assess economic value of real and financial assets, and make decisions to create value; AACSB standard 9.2.3 - Financial theories, analysis, reporting, and markets.)

Subsequently, in ensuing semesters, students were given more practice time in class to solve similar problems and were successful in solving those problems. It appears that some students misunderstood the wording of the problem

and were confused as to whether to treat the loan value as the present value of an ordinary annuity or annuity due. Class time was spent in clarifying the issue. The practice problems were how to compute a PV or FV of an annuity due and the students were unable to transfer the knowledge to an ordinary annuity. After instituting the changes, some improvement in student learning outcomes were noted, but not a substantial amount. More practice problems in class for PV and FV for an ordinary annuity will be instituted. **Loop closed.**

An example of closing-the-loop activities in the BSBA that are also tied to the AACSB standards can be found in *BUS 308 – Systems in Organizations*. The course has AACSB learning outcomes 9.1.1 (written communication) which aligns with BSBA learning outcome #3; learning outcome 9.1.3 (analytical thinking) aligning with BSBA learning outcome #4; learning outcome 9.1.4 (information technology) aligning with BSBA learning outcome #8; learning outcomes 9.1.5 (interpersonal relations and teamwork) and 9.1.6 (diverse and multicultural work environments) aligning with BSBA learning outcome #11; learning outcome 9.2.6 (information technology and statistical/quantitative methods...) aligned with BSBA learning outcome #4; and AACSB learning outcome 9.2.4 (systems and processes within organizations) which is a core competency for the *Systems in Organizations* course. The following is an example of one rubric used in *BUS 308*:

Criteria	Ratings				Pts
Problems Identification	Exceeds Expectations: Important business problems have been correctly identified, with a comprehensive and relevant explanation of contextual factors. Information presented in the case has been thoroughly analyzed in terms of relevancy, sufficiency and accuracy. Both implied and stated assumptions have been reviewed and assessed for their impact on company operations. 10 pts	Meets Expectations: Important business problems have been correctly identified, taking into account a variety of contextual factors. Information presented in the case has been analyzed in terms of relevancy, sufficiency, and/or accuracy. Stated assumptions have been noted and analyzed for their impact on operations, omitted assumptions can readily be added through an external review of the report. 8 pts	Below Expectations: Important business problems have been correctly identified, taking into account obvious contextual factors but missing those which were not stated directly in the case. Information presented was analyzed weakly with minor gaps or mistakes. Stated assumptions were noted, but the analysis is limited in its utility and requiring substantial refinement. 6 pts	Does Not Meet Expectations: The team failed to examine all of the evidence, oversimplified, or jumped to conclusions about a problem that was incorrectly described. One or more of the following problems occurred: correct analysis was incomplete or too superficial to be of use, assumptions were missed, information was misinterpreted or misused. 4 pts	10 pts
9.1.3 - Analyze & Frame Problems new/orig revisited 2 pts	Exceeds Expectations: The analysis of information gaps was perceptive, and the team engaged in active information gathering, asking deeply into the materials provided. A comprehensive review of relevancy resulted, incorporating a wide variety of sources, leading to a professional quality analysis that drew clearly on personal and professional experience. 10 pts	Meets Expectations: Relevant information gaps were identified. The team successfully engaged in information gathering based on that review and found additional materials that were relevant to filling the identified gaps. At least two different types of sources were used. The analysis was on-target. It is evident that the team has limited professional experience upon which to draw. 8 pts	Below Expectations: At least one gap in information was identified. The team found additional information to fill the gap, but it was limited in its scope. The search strategies used were inadequate to permit a thorough coverage of what was needed. The team may not have looked beyond one type of information. The analysis was shallow but still correct, ready for expansion and refinement. 6 pts	Does Not Meet Expectations: Information was taken at face value, without benefit of active questioning. As a result, gaps in the information were not identified or were incorrect. No apparent systematic search strategy was used. The resulting analysis was off base in one or more significant ways. 4 pts	10 pts
9.1.4 - Information Technology new/orig revisited 10 pts	Exceeds Expectations: The student has used the correct methodology and software to analyze quantitative data, determining any needs for additional or different data. Where analyses are incorrect or inadequate, the student has identified the inadequacies and made or suggested appropriate corrections to improve the validity of decisions. 22 pts	Meets Expectations: The student has used the correct methodology and software to analyze quantitative data, determining any needs for additional or different data. Where analyses are incorrect or inadequate, the student has identified the inadequacies and attempted to resolve them. Additional analyses are needed prior to presentation to the company. 18 pts	Below Expectations: The student has used the correct methodology and software to analyze quantitative data. Problems in methodology were identified correctly, but the corrections suggested were either incorrect or not attempted. Significant work on the report is still needed. 14 pts	Does Not Meet Expectations: The student is unaware of inadequacies in data analysis and software use and clearly does not understand the purpose or use of specific data analysis techniques. Some suggestions made are incorrect, as well, and could lead to a decision harmful to the company. 6 pts	20 pts

Translating Results	Exceeds Expectations: The student has translated the results of the data analysis into a discussion of proposed solutions to problems, made evident by the data. The discussion is insightful and well reasoned. 20 pts	Meets Expectations: The student has translated the results of the data analysis into a viable discussion and proposed the possible solution to problems made evident by the data. The discussion is adequate. 18 pts	Below Expectations: The student has translated the results of the data analysis into a discussion demonstrating a basic level understanding of the numbers, but some of the data are misinterpreted leading to at least one major incorrect conclusion that is relatively harmless. 14 pts	Does Not Meet Expectations: The student does not understand the data output well enough to identify the situation. The data are essentially unintelligible numbers on a page for him/her. The analysis is incoherent and of no use to the company. 8 pts	20 pts
9.1.3 - Application of Knowledge view angle: example element: 15 pts	Exceeds Expectations: The student has translated the results of the data analysis into an appropriate set of recommendations, conclusions, or solutions for the company that will enhance its operation. 20 pts	Meets Expectations: The student has translated the results of the data analysis into a recommendation or action that should prove helpful for the company's operation. 18 pts	Below Expectations: The student has translated the results of the data analysis into a recommendation or action, but it is not likely to resolve or may heighten the problem. 14 pts	Does Not Meet Expectations: The student's decision does not make sense and could harm the company. 8 pts	20 pts
9.1.1 - Written Communications view angle: example element: 8 pts	Exceeds Expectations: The purpose of the writing is clear and carries through the entire study. The study is cohesive, accurate, and persuasive, flowing logically from point to point and section to section. The reader is well prepared for each sentence in this thoroughly professional report that would not be significantly improved. 18 pts	Meets Expectations: The purpose of the writing is clear and carries through the entire study, which is cohesive and accurate. There are appropriate sections, however, there are instances in which the flow is interrupted between points or headings. The student could readily fix these problems with additional time and advice. 8 pts	Below Expectations: The purpose is stated, but the language is not clear or the study is organized in sections that are appropriate but they are co-mingled and mildly disjointed or the writing is formal and partially inaccurate in one or two places. Problems can be remedied easily by an editor. 8 pts	Does Not Meet Expectations: The purpose is not stated or it does not drive the writing of the study. The report is disjointed and contains three or more inaccuracies. 4 pts	18 pts
Grammar & Vocabulary	Exceeds Expectations: Grammar and vocabulary usage are flawless. The selection of vocabulary is rich, providing vivid descriptions that support all arguments made. 10 pts	Meets Expectations: Grammar and vocabulary usage are acceptable, although there are minor punctuation or spelling errors. The narrative is descriptive and supports all arguments made. 8 pts	Below Expectations: Repetitive mistakes in grammar are made. Vocabulary is correctly used but simplistic, requiring that the reader interpret constraints. 8 pts	Does Not Meet Expectations: Mistakes in grammar are pervasive. 4 pts	10 pts
Total Points: 100					

### BUS 308 – Systems in Organizations

Based on embedded in-course assessments of student learning over the past several years, several sections of the course are now using both an experiential and a flipped-classroom model. In addition, students are given the opportunity for multiple rewrites of case analyses, a change from the previous pedagogy. By changing from a lecture teacher-oriented classroom to an experiential student-centered approach, in-course assessments for the past two years have shown an increase in critical thinking and analytical skills (AACSB standard 9.1.3), as well as an increase in written communication skills (AACSB standard 9.1.1). The experiential portion of the course is the playing of several simulations where groups of students compete with each other to ‘win’ the simulations. Several sections of the course will remain both an experiential and a flipped-classroom with refinements to the pedagogy and curriculum as indicated by the changing business environment. **Loop closed.**

### BUS 362 – Consumer Behavior

Assessed 2013-2014 AY

#### Learning Outcome 2a:

Analyze purchase decision processes

As part of a larger final course exam, all 53 students from two sections of Consumer Behavior (BUS-362) answered eight multiple-choice test questions identified as addressing Learning Outcomes 2a.

The students met the standard established by the Marketing Department on their overall score on the eight questions representing LO2a. Of the 53 students assessed, 46 students (87%) answered the exam questions correctly.

#### AoL Actions by the Marketing Department

Three improvements were implemented as a result of monthly AoL discussions.

#### Major AoL Plan Revision.

The department realized after going through one three-year cycle of assessment under a Plan developed in 2011 that most of the learning outcomes no longer adequately addressed the skills and knowledge our students should have upon graduation. In addition, the department found many learning outcomes from the 2011 Plan difficult to assess at the individual level.

**Comprehensive Curriculum Review and Revision.**

The marketing department carefully reviewed the curriculum in fall 2014 to determine the relevancy of the curriculum offerings and sequencing, course pre-requisites, and materials/tools. The overall objective was to ensure that the curriculum helps the department meet the Program Goals and supports students in their mastery of content.

**Adoption of an End-of-Program Comprehensive Exam.**

Instead of undergoing the challenging and often burdensome task of identifying individual courses and measures to assess the learning of our students each assessment period, the marketing department decided to implement a comprehensive exam that all marketing students will be required to take at the end of their program (either December or May). The exam will cover all learning outcomes. The first exam was administered in May 2015.

*BUS 461 – International Marketing*  
**Assessed 2012-2013 AY**

**Learning Goal 3:**

To assure that students understand the macro-environment and firm level context in which the marketing function operates.

**Outcome 3a:**

Describe marketing in the context of worldwide commerce and the internationalization of business

**Outcome 3b:**

Assess the regulatory, geopolitical, social, cultural, economic and technological developments that can promote or disrupt marketing strategies and ambitions.

**Outcome 3c:**

Evaluate an organization's marketing performance in a global economy, including the ethical and social impact of all its marketing activities

As part of a larger final course exam, all 46 students from one section of International Marketing (BUS-461) answered 15 multiple-choice test questions identified as addressing Outcomes 3a, 3b, or 3c.

*Results*

Overall, the students passed the standard set by the Marketing Department on their overall score. They scored on average 12.9 (84%) of the 15 related exam questions correctly. There was a notable difference between the total scores of the marketing major students and those of the non-marketing students (international business majors). Their scores were 83% and 87% respectively.

**LO3a: Target met.**

On average, students correctly answered 4.09 (82%) of the five questions aligned with LO3a. Here the Marketing majors and the non- marketing majors performed equally.

**LO3b: Target not met**

On average, students correctly answered 3.38 (68%) of the five questions aligned with LO3b. Marketing majors performed worse than the non-marketing majors on the five questions related to this measure. On average, marketing students scored 11 percentage points lower than the non-marketing majors.

**LO3c: Target met.**

On average students correctly answered 3.54 (70.8%) of the five questions aligned with LO3c. The marketing majors performed better than the non-marketing students on this measure scoring four percentage points higher than the non-marketing majors.

### *Conclusion*

The assessment results suggest that students' overall performance demonstrates understanding of the macro-environment and firm level context in which the marketing function operates. In addition, students seem to grasp the concepts of LO3a (marketing in the context of worldwide commerce and the internationalization of business). However, all students are weak in their understanding of LO3b (the regulatory, geopolitical, social, cultural, economic and technological developments that can promote or disrupt marketing strategies and ambitions).

Comparing the results of marketing majors and non-marketing majors who are mostly majors in International Business (IB), we found that IB majors outperform Marketing majors on LO 3b, but they underperform Marketing majors on LO 3a and 3c. Given that IB majors tend to be foreign-born and raised outside of the US, or have done study abroad, we believe this apparent discrepancy in the performance of marketing majors and non-majors is a result of a lack of exposure to international environments.

### *Course/Curriculum Improvements:*

- Encourage Marketing majors to take study-abroad opportunities when we advise our majors;
- Engage international students in all marketing classes, particularly giving them opportunities to share
- Knowledge about their home countries "regulatory, geopolitical, social, cultural, economic, and technological developments..." so that domestic as well as international students in our Marketing major can all benefit;
- Employ other campus-wide resources during the entire four years of their college education, such as cultural events run by the Center for the Pacific Rim, to help our Marketing majors do better on LO 3b

### *Improvements to AoL process/methods:*

- Refine our assessment instruments so that they truly measure relevant knowledge and skills, rather than outdated and/or trivial facts.
- Develop an exit exam for the marketing major program that is part of the requirements to graduate with a degree in marketing. This will ensure that all students are tested and we can reduce selection bias.

### *Student learning initiative:*

Made Assessment of Learning a standing agenda item in the monthly department meetings. This will encourage ongoing dialogue about improvements to student learning and help us to monitor and evaluate implementation of course/curricular improvements.

### **The Comprehensive Business Exam (CBE)**

A portion of the external Comprehensive Business Exam (CBE) was administered in the spring of 2015 to incoming BSBA freshman students as a pre-test and to graduating BSBA seniors as a post-test as well as to some of the BSM students. The initial target was that graduating USF students will meet or exceed the national average of the relevant portion of the CBE exam. Courses where the CBE exam was administered included *BUS 100 – Launch into Business* for the pre-test and *BUS 406 Entrepreneurial Management* for the post-test.

An example of proficiency by students in the CBE was in the legal portion of the learning outcome **Ethical and legal behavior, and social responsibility** (BSBA learning outcome #2). It was determined that the target for the **Legal Environment** portion of the exam was met by the graduating seniors. The test showed that 43.64% of seniors answered 66% or more of the questions correctly (Basic + Proficient + Mastery). The scores were just above of the national average of 43.15% who answered at least 66% of the Legal Environment questions correctly.

Just missing the target were the scores for **Social Environment** (BSBA learning outcome #2). 54.55% of the seniors answered 66% or more of the CBE **Social Environment** questions correctly (Basic + Proficient +Mastery). The scores were just below of the national average of 58.6% who answered at least 66% of the Social Environment questions correctly.



All of the other sections of the CBE showed the USF students below the national average. The School of Management is taking several steps to address this concern:

- 1) The test is being administered again to gain a larger sample size.
- 2) Faculty have requested data on the time lag from when students may have taken a course and when the test was administered since a considerable time difference could lead to substantially lower scores on certain sections.
- 3) Each department chair has been asked to address the lower scores with the faculty of their departments.
- 4) A number of questions given in the exam are in areas of content that are not covered in the school's curriculum.
- 5) Other direct measures besides the CBE need to be incorporated into courses to measure student learning outcomes.

Since the last AACSB visit, two departments, *Entrepreneurship & Innovation* and *Hospitality Management*, in the School of Management's undergraduate program have analyzed their programs and after careful evaluation, revamped many of their course offerings to be more in line with market realities.

### **Entrepreneurship & Innovation**

The Entrepreneurship & Innovation (E&I) Major was redesigned in fall 2013/spring 2014 and was formally introduced in Fall 2014. The updated major focuses on providing for more entrepreneurial experience as well as more choice in the curriculum in order to develop a more competitive field of classes. *BUS 378 - Family Business* was reintroduced, three years after the passing of its originator, Dr. Eugene Muscat, and an undergraduate Academic Global Immersion (AGI) in Family Business course (*BUS 379*) was designed in conjunction with Javieriana University in Cali, Colombia. A 100 hour internship requirement has been added which can be fulfilled with either the new *BUS 373 - Entrepreneurship and Innovation Practicum* or the *BUS - 474 Practicum in Family Business*. For the latter course, students are encouraged to have completed either *BUS 378 Family Business* or *BUS 379 Family Business Immersion* as a prelude to their practicum fieldwork.

An additional choice in the curriculum was created by eliminating the *BUS 377 - Nuts and Bolts in Entrepreneurship* class for students in the major as elements of it were repetitive with requirements in the *BUS 406 Capstone* course. The department made *Entrepreneurial Finance* an elective, as opposed to a program requirement, since a sufficient amount of finance has been incorporated into the *BUS 406 Capstone* curriculum. Entrepreneurial majors went from having four required classes to two required classes coupled with a strong experiential component. We believe these changes create a competitive field of electives in which students can better tailor their E&I major.

Along with the updated E&I major, a new E&I minor was designed and launched for non-business majors (e.g. students studying physics, art, etc.) With the new major and minor, a more rigorous advising protocol was also instituted: students who are interested in the E&I major are now required to complete a pre-major approval interview to assure that the major is a good fit for their aspirations.

Examples of Entrepreneurship & Innovation courses that were added or changed since the last AACSB site visit include:

#### *BUS 349 - Creativity, Innovation, and Applied Design*

An all-hands faculty meeting took place in spring of 2014. Faculty agreed to collaborate more actively on the curriculum content, share resources, and enhance the experiential learning aspect of the course (e.g. labs, incorporation of the 3d printer work, industry speakers and engagement, experiential projects in collaboration with design companies/ firms). Team projects in the course will be more closely aligned with stated outcomes and will be evaluated by industry experts in addition to faculty.

#### *BUS 373 - Entrepreneurship and Innovation Practicum*

Based on the faculty and student feedback, in addition to the assessment of the department's goals and outcomes, a new course was proposed and launched in Fall 2014 in the format of an internship; students are placed with innovative (mostly start-up) companies in Silicon Valley and work under faculty supervision developing a business proposal closely aligned with their ongoing professional engagement. The class also has some immersion elements including visits to innovation hubs, business centers and related entrepreneurial establishments in the SF Bay Area.

#### *BUS 406 - Entrepreneurial Management (Capstone course)*

Based upon external feedback, the BUS 406 course has placed a greater emphasis on market and competitor research as well as design capability, including physical or on-line prototyping, in order to support students' learning goals. Instructors are heightening discussions about sustainable business practices, marketing analytics and accounting skills acquired in earlier core classes. The UPC's subcommittee on AoL is actively engaged in these conversations and resulting recommendations will be taken to the full UPC. (The course maps to BSBA learning outcomes #10 – Strategy & Competitive Advantage; BSBA learning outcome #11 – Diversity and Integration; and BSBA learning outcome #12 – Global Economy.)

#### *BUS - 474 Practicum in Family Business*

BUS 474 engages students with family businesses by actively working with the City/County of San Francisco's Mayor's Office of Small Business (MOSB), the San Francisco Small Business Development Center and the Legacy Business Program. Many of San Francisco's legacy firms are family owned and, therefore, are part of the local family business population. BUS 474 fieldwork extends upon previous team projects (including the successful passage of Proposition J in November 2015) that have assisted MOSB in its efforts to support these firms and "put a face" on San Francisco's legacy/family businesses.

### **Hospitality Management**

In 2012, the department of Hospitality Management began the process of revising its undergraduate curriculum. The catalysts for this change were the hiring of a new Administrative Director who was focused on growing the program in size and global recognition and to bring the curriculum in line with other courses in the School of Management, particularly in the number of units for each course. With the revisions, the Hospitality Management program within the BSBA dropped one course, added two courses, and combined two courses.

- *Hospitality Human Resources and Labor Relations* (dropped as a requirement)

The key concepts included in the *Hospitality Human Resources and Labor Relations* class are delivered to students through the business core course, *BUS 304 - Management and Organizational Dynamics*, as well as *BUS 388 - Services Management*. The *Services Management* course utilizes the "Service-Profit Chain" and the "Cycle of Capability" (Heskett et al, 1994) as a framework for the delivery of this course, which stresses many human resource processes critical to the successful management of a hospitality enterprise including careful employee selection, employee training, job design, psychological empowerment, employee satisfaction, and employee recognition. It should also be noted that the OLC Department offers a 2-unit human resource course already for students that want additional coursework in this specific area.

The department of Hospitality Management will occasionally offer *Greening the Hospitality Industry* as an elective course for Hospitality Management majors as well as other University students that are interested in sustainability. (This course aligns with the BSBA learning outcome #2 - Recognize and analyze ethical...and social implications of management decisions and devise appropriate responses, as well as AACSB standard 9.2.2 - Social responsibility, including sustainability, and ethical behavior approaches to management.)

- *Optimizing Revenue in the Hospitality Industry* (added as a required course for all hospitality majors)
- *Convention, Exhibition and Venue Management* (added as a required course for students on the meeting and event management track)

These two courses were added in response to the input of the hotel, and meeting and event focus groups respectively to address the need to be more relevant in the courses we offer.

- *Introduction to the Hospitality Industry and Professional Development* (combined the two courses)
- *Culinary Arts and Restaurant Entrepreneurship* (combined the two courses)

These two courses were formerly four 2-unit courses. The four 2-unit courses were combined into two 4-unit courses to come into alignment with the rest of the School of Management's course unit offerings.

The department of Hospitality Management has created two academic tracks: 1) hotel and restaurant management, and 2) meetings and event management. The first, hotel and restaurant management, follows the traditional program of hospitality management majors world-wide. The second, meeting and event management is designed to address the fastest growing field in the industry and the one with the highest student demand. The tracks are focused on the career paths the students will pursue. The department considered the facts that more than 40% of the alumni in the industry work in hotels, 33% of them are now in food and beverage related positions, and 25% are in meetings and events related positions. These were all factors behind the determination of the tracks.

Since making revisions to the curriculum two years ago, the faculty now have a better idea as to how students are responding to the two-track structure. The department is also concerned about low enrollment in the major. Consequently, the Hospitality Management department has a task force comprised of a mix of industry professionals, program faculty, and staff, taking another look at the curriculum and the career opportunities for which our graduates are prepared.

The following are examples of Assurance of Learning (AoL) efforts in specific courses within the Hospitality Management department:

#### *BUS 283 - Introduction to the Hospitality Industry*

In the 2011-2012 AY, the final class project "Career Topic Research Project & Paper" was used to assess the learning outcome "Students will be able to demonstrate an awareness of operational processes, industry trends and use of technology that enhance creativity, effectiveness and efficiency in the hospitality industry." This learning outcome aligns with AACSB standard 9.1.4 (information technology) and 9.2.4 (systems and processes within organizations). It was found that students had commanding awareness of industry trends, especially in relation to the career in which they wrote about. This is believed to be an acceptable level of emerging knowledge. Students essentially demonstrated no awareness of operational processes and technology usage. It was determined that the faculty needed to revisit the learning outcomes for the class; and decide whether work from this class is appropriate for this assessment; and, if the department learning outcome was appropriate for the department. Learning outcomes for the course were changed to reflect more "action-oriented" outcomes – thus making it easier to assess those outcomes at the end of a semester. Another result of the discovery of misalignment of the course with learning outcomes was the department faculty realized that one of the other department courses, *BUS 181 - Hospitality Professional Development*, based upon the way that the course was designed, was not an appropriate one to use in assessing any of the department's learning outcomes. The BUS 181 course was thus removed from the list of courses to be used to assess learning outcomes.

#### *BUS 483 - Hospitality Marketing and Services Management*

During the 2012-2013 AY, the department of Hospitality Management used a mid-term essay examination to assess the learning outcomes "Students will be able to identify, evaluate, and implement management service strategies in the global hospitality industry (which aligns with the BSBA learning outcome #12 – Global Economy)," and; "students will be able to demonstrate an awareness of and commitment to social and environmental responsibility as a hospitality leader (which aligns with the BSBA learning outcome #2 – Ethical...and Social Responsibility)." What was learned from this assessment was that the way the learning outcomes were written were not very clear and specific in their wording, thus making them somewhat difficult to use as assessment metrics. While it was

determined that nothing needed to be done at the course level at the time, the learning outcomes were rewritten to be able to better assess the learning outcomes in the future.

*BUS 386 - Meeting and Event Management*

Students created a real event proposal that was presented to the hospitality department with an actual budget. The project was assessed by the learning outcome “Apply relevant service management strategies to the global hospitality industry (which aligns with the BSBA learning outcome #1 – Leading and Managing).” What was learned with this assessment is that the measure, although good for measuring service management skills, does not measure those skills in a global environment, and is probably not a good measure to use to measure the outcome in a global setting. It is difficult to say whether students were weak or strong in their global knowledge, if using the said measure. To ensure that students are learning about service management in a global context, a measure specifically targeting that outcome in a global environment will be incorporated into BUS 386 in the future.

## SOM, BSBA - BSBA Curriculum Map

Legend: (1) - Introduced, (2) - Moderate Coverage, (3) - Comprehensive Coverage

Learning Outcomes	BUS 000 Orientation	BUS 100 Launch into Business	BUS 201 Principles of Financial Accounting	BUS 202 Principles of Managerial Accounting	BUS 204 Quantitative Business Analysis	BUS 301 Business Law	BUS 302 Marketing Management	BUS 304 Mgt and Organizational Dynamics	BUS 305 Financial Management	BUS 308 Systems in Orgs.	BUS 401 / BUS 406 Capstone Courses
01) Leading and Managing	1	1					2	2	2		
02) Ethical and legal behavior, and social responsibility	1					2	1	2			
03) Communication	1	2								2	
04) Quantitative and Qualitative Information	1				2	2				3	
05) Accounting	1		2	2							
06) Finance	1								2		
08) Technology and Logistics	1							2			
07) Organizational Behavior and Theory	1							2			
09) Marketing	1						2				
10) Strategy and Competitive Advantage	1										2
11) Diversity and Integration	1									2	2
12) Global Economy	1	Global topics are covered in all of the majors for the BSBA <small>Marketing</small>									

### **Bachelor Science in Management (BSM)**

The mission, program goals, and learning outcomes for the BSM program are nearly identical as for the BSBA. The implementation of the BSM program curriculum took two years with the first cohorts starting the spring 2012 semester and graduating in December 2014. Four courses offered in the program were carryover courses from the legacy CPS programs: BSM 301-Public Policy and the Regulatory Environment), BSM 304-Foundations of Organizational Behavior, and the writing and ethics courses. Completing the BSM core were a newly designed statistics course (BSM 306-Business Analytics Fundamentals), a four-unit course in marketing (BSM 302-Marketing Fundamentals & Strategies), and two two-unit courses (BSM 303-Systems and Technology and BSM 326-Financial Accounting Fundamentals). The integration of the BSM 302 and BSM 306 courses into the curriculum were seamless.

Given the newness of the program, the assurance of learning process is being implemented now. Between spring 2013 and prior to the first cohorts graduating, there are several examples of continuous improvement with respect to BSM 306 and especially BSM 303 and BSM 326.

After the first offering of BSM 306, feedback from students and faculty resulted in several changes by the BAIS Department to ensure consistency in the student education experience across campuses. These changes included:

- Establishing a common syllabus
- Assigning the same textbook in all sections
- Emphasizing Excel in the course (with at least one homework assignment completed in Excel)
- Sharing of resources across campuses by faculty (e.g., homework files, quizzes, lecture notes, etc.)

The BAIS Department instituted annual meetings with the faculty teaching BSM 306. The department chair also spoke with faculty after the course was offered in a given semester. During the semester, faculty kept the department chair briefed on any issues with students. It should be noted that other departments have a similar process with respect to their core BSM course offerings.

The initial offerings of BSM 303 and BSM 326 were not as successful. When first offered in summer 2013, the two two-unit courses were not well received by students and faculty. Student learning and faculty teaching suffered. Too much content was wedged into the two courses creating challenges for students (i.e., difficulty in absorbing and retaining new material and subject matter) and for faculty (i.e., difficulty in introducing subject matter that few students had ever been exposed to before).

The associate dean for undergraduate programs met with the BAIS and Accounting Department chairs and the department chairs then met with their respective department faculty. A proposal was developed that included a short-term fix and a long-term change. In the short-term, faculty met and discussed the syllabus and material covered in each course. Course assignments were also reviewed. The syllabi were altered to ensure essential material was covered in a compressed two-unit course. In BSM 326 it was decided to assign all homework via Pearson Online, which provided students with extra tools to practice and revisit material learned in class.

The long-term change involved rethinking the allocation of units dedicated to core versus elective courses. It was decided that increasing BSM 303 and BSM 326 to four-unit offerings was critical to ensure adequate coverage of the fundamentals of systems and technology, and accounting and finance. This change was presented to the UPC in fall 2014 where it was unanimously approved increasing the core course requirements to 32 units (from 28) and reducing the electives requirements from 16 to 12 units. These changes are effective with the cohorts starting in fall 2015.

*Future Assessment of Learning.* Starting fall 2015, a sample of incoming students representing all campuses where the BSM is offered will take the CBE after completing their first term. That is, students will take the CBE after completing their writing and ethics courses but prior to them starting the degree's management core courses. A sample of graduating students – again representative of all campuses – will also complete the CBE. This process provides pre- and post-test data with respect to student learning in the general business and management knowledge areas.

## SOM, BSM - Mapping: Curriculum Mapping

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Legend: (1) - Introduced, (2) - Moderate Coverage, (3) - Comprehensive Coverage

Learning Outcomes	BSM 000 Orientation	BSM 301 Public Policy & Regulatory Environment	BSM 302 Marketing Fundamentals & Strategies	BSM 303 Systems & Technology	BSM 304 Foundations of Organizations & Management	BSM 306 Business Analytics Fundamentals	BSM 309 Financial Accounting Fundamentals	INTD 310 Interdisciplinary Research and Writing	INTD 311 Ethics & Society
01) Leading and Managing	1		2		2				
02) Ethical and legal behavior, and social responsibility	1	2	1		2				2
03) Communication	1			2				2	
04) Quantitative and Qualitative Information	1	2		3		2			
05) Accounting	1						2		
06) Finance	1								
07) Organizational Behavior and Theory	1				2				
08) Technology and Logistics	1				2				
09) Marketing	1		2						
10) Strategy and Competitive Advantage	1								
11) Diversity and Integration	1			2					

## **Graduate Programs**

### **Master of Business Administration (MBA)**

**Mission Statement:** The Mission of the USF MBA programs is to promote disciplined analysis as a catalyst to positive change in business practice. Our integrated curriculum, practitioner-focused concentrations, and pragmatic learning opportunities with Bay Area business enable our graduates to build more productive and compassionate organizations. We combine the global diversity of our students, analytical rigor of our faculty, and the entrepreneurial energy of our region to create a rigorous and practical learning environment that is regionally anchored, nationally recognized and globally respected.

Since the last AACSB report in 2011 there have been changes to learning objectives, curriculum, specific courses, and required skills based on feedback by students and faculty members. The new Program Goals and Learning Outcomes are:

#### **Program Goal 1 - Demonstrate ability to apply theoretical constructs to “real world” applications to solve problems**

- **Learning Outcome: 02) Practical Problems**  
Students will apply theory to solve practical problems.
- **Learning Outcome: 06) Strategic Plans**  
Students will formulate and execute strategic plans.

#### **Program Goal 2 - Demonstrate effective communication and leadership skills in a business environment**

- **Learning Outcome: 01) Fundamental Language and Skills**  
Students will display mastery of the fundamental language and skills of core business areas.
- **Learning Outcome: 05) Leadership and Communication Skills**  
Students will possess effective leadership and communication skills & strategies.

#### **Program Goal 3 - Demonstrate effectiveness in analyzing ethical and societal concerns in a business environment**

- **Learning Outcome: 03) Business Environment**  
Students will measure, analyze and interpret all aspects of the business environment.
- **Learning Outcome: 04) Legal, Ethical and Social Concerns**  
Students will integrate legal, ethical and social concerns into business decisions.

To help students achieve these learning outcomes, faculty and administrators of the MBA program have continuously improved the program since the last AACSB visit in 2011. Representative improvements, based on direct and indirect measures, include:

#### *MBA 6014 - Leadership, Teams and Organizations*

Students used their “First Week Leadership Profile” from the beginning of the semester and material covered in the course to develop a personal leadership development plan. Students were expected to synthesize course concepts into a clearly identified and actionable plan.

Students were expected to show:

- A strong grasp of a significant portion of the course material
- Exemplary insight into the possible implications of the course ideas
- A synthesis of personally relevant goal-oriented actions using course ideas

Direct assessment in 2013-14 of the Self-Development Plan were measured for three learning outcomes:

- apply theory to solve practical problems (Learning Outcome #2)
- integrate legal, ethical and social concerns into business decisions (Learning Outcome #4)
- formulate and execute strategic plans (Learning Outcome #6)

The rubric to assess these three learning outcomes was as follows:

- **Apply Theory to Solve Practical Problems**



- Relate Theory to Application  
The primary indicator of this objective being accomplished is the student's clear and appropriate citation of assigned course readings and related material in support of relevant observations, conjectures or claims made in the paper.
- Create an Application to Solve a Problem

The "application" is an evidence-based, individualized process or approach to the development of career and personal objectives. This plan is expected to draw from course material and relevant experiences for the support of the student's ideas or in effective contrast with same. Relating theory to application is brought to bear in the development and explanation of insight that can be used by the student in self-development.

- **Integrate legal, ethical and social concerns into business**

- Identify Relevant Legal and Ethical Concerns  
This learning outcome is measured through examination of the extent to which the student associates personal values, responsibility, and accountability with their plan of action.
- Identify Relationship of Legal, Social, Ethical Issues with Business Concerns  
Accomplishment of this learning objective can be shown through the student's association of personal values, responsibility, and accountability with the determination of desired impact on other stakeholders in their activities (e.g. organization, community, identified group). Other relevant dimensions that may be included in this area include effects of the student's planned action on resources needed by others or sustainability.

- **Formulate and Execute Strategic Plans**

- Understand Key Attributes of Visions and Plans  
This learning objective is often revealed by the level of organization, critical thinking, and appropriate perception of scope and requirements involved with the self-development plan articulated by the student.
- Develop Strategic Vision in Relevant Business Context  
The business context is often shown in this assignment either through explicit association of the development plan with specific business activity or through the higher-level, categorical consideration of how the student's development supports certain outcomes within the domains they operate in.

Direct assessment in 2013-2014 showed opportunities to improve on the three program learning outcomes as the student learning outcomes were not as positive as expected. In 2014-15, two of these opportunities (Practical Problems and Strategic Plans) were addressed by adding five new activities (Experimental Write-ups) to the course. These assignments required the students to take a theoretical piece of course content and design an experiment in which they were participants to test their ability to apply theory to practice.

The rubric to assess the experimental activities is as follows:

#### Experiment Grading Rubric

Direct assessment showed significant performance improvement on both learning outcomes (Apply Theory to Solve Practical Problems and Formulate and Execute Strategic Plans)

Criteria	1	2	3	4
<b>Idea</b>	Idea or framework under consideration is not apparent	Idea or framework under consideration is stated	Idea or framework under consideration is stated and linked to the coursework	
<b>Hypothesis</b> (A statement not a question)	Hypothesis is confused or missing	Hypothesis is clear	Hypothesis is clear and generates clear outcomes	
<b>Design of Experiment</b>	Experiment is not designed to test hypothesis	Experiment may successfully test the hypothesis	Experiment is well designed to test the hypothesis	
<b>Complexity of Experiment</b>	Experiment has no action taken by author	Experiment has one action taken by author	Experiment compares a baseline to the experimental condition	Experiment has two conditions and gathers feedback from participants if appropriate
<b>Learnings Generated</b>	Experiment produces no learnings (or they are not written up)	Experiment produces some learning	Experiment produces clear learnings	Experiment produces clear learnings that are linked to the course, the individual, and the larger context of relationships, job, and/or society
<b>Write Up</b>	Write up is missing sections and doesn't explain the experiment clearly	Write up explains some of the idea, hypothesis, design, actions taken, outcomes and learnings and is missing sections	Write up fully explains the idea, hypothesis, design, actions taken, outcomes and learnings	

The experiments, while there are five of them, are not a final summary activity. Examining the final summary activity with an eye towards scoring them against the three learning outcomes may lead to a tighter coupling between the activity and assurance of learning. While students were successful at improving their scores on two learning outcomes, there may be the opportunity to design improvements to the course for the 2015-2016 AY that would directly address the third learning outcome (Legal, Ethical, and Social Concerns). **Loop closed.**

#### MBA 6016 - Marketing Management

6016 - Marketing Management is the required MBA core marketing class. During the spring 2014 semester, students were unhappy that the class was "too undergraduate" and did not incorporate a more graduate approach. Based on indirect feedback from course evaluations and the MBA GSA student survey, it was evident that students wanted a more case-based approach with applications.

The class was redesigned to include more case studies. Case studies were employed in three ways:

- The book, *Marketing Successes and Mistakes* became a required textbook. The book presents a series of case studies that profiles both the good and bad of marketing management decisions. Students were

divided into groups of three or four students and they presented cases from the text. They updated the cases and posed questions to the class and ended each case discussion with an update of the company.

- Students prepared a case analysis of an assigned Harvard case. Students were instructed on how to prepare a case and submitted an analysis for one of four cases.
- Students prepared a “real world” case analysis of a company. The project, a marketing audit, profiled a company. Students presented findings to the class

As a result of these changes, based on class evaluations, students were more satisfied with the marketing class and enrolment increased in marketing electives significantly. Electives were now enrolling 25-30 students per semester rather than 10 previously.

#### *MBA 6018 - Spreadsheet Analytics*

The *MBA 6018 - Spreadsheet Analytics* course supports program learning outcomes:

- Display mastery of the fundamental language and skills of core business areas.
- Apply theory to solve practical problems.
- Measure, analyze and interpret all aspects of the business environment.

During the 2014-2015 AY, the learning outcome **Measure, analyze and interpret all aspects of the business environment** was measured by assessing the course learning outcome “Apply skills and design principles to efficiently implement structured models in the flexible, unstructured Excel software environment.”

During the course the students are given a sizable spreadsheet modeling assignment each year. From conversations with students from previous semesters who had taken the course, faculty realized that many students were struggling with some aspects of the work. The faculty were determined to improve their learning.

In the 2014-2015 academic year, the faculty took the following steps to help improve learning outcomes:

- Added one-on-one and group coaching sessions with program faculty.
- During class and also during the supplemental group instruction sessions, faculty implemented a coaching intervention that proved to be reliably effective by providing a pathway to help students understand calculations of performance measure values.
- Developed a new instructional document to support best practices in modeling and spreadsheet design for large-scale modeling and analysis.
- Reviewed the contents of this new document in class while illustrating key points in Excel and on the board.

Informal student feedback (to faculty and to the TAs who had been students in the course the previous year) was strongly positive. The coaching experience gave faculty many insights into where students were struggling. Faculty learned that the best coach is a fellow student who “got it” two minutes earlier.

Faculty found statistically significant improvement in student performance. To quantify the findings, faculty conducted a controlled experiment by examining the results of an assignment that was given both before and after the implementation. In both cases, the assignment was graded by teaching assistants who were following the same rubric (the TAs did not actually know that this assignment or its results were in any way connected to an Assurance of Learning process).

- The mean score on the assignment during the 2013-2014 Academic Year was 82.84, with a standard error of 1.89.
- The mean score on the assignment during the 2014-2015 Academic Year was 87.54, with a standard error of 1.25.

The rubric used for the Excel assignment is as follows:

### Grading Rubric for Modeling Assignment

Buckeye Evaluative Model - Grading Rubric			
Concept	Possible	Earned	Comments
Decision Variables (Correct, Organized)	10		
Input Data - Stored in Original Form & Referenced	5		
Input Data - Clearly Organized for Calculations	10		
Calculations - Easy to Read	10		
Calculations - Unit Conversions	5		
Consistent Row and Column Structure, Labels	10		
Modular Layout	10		
Highlighting of Different Data Elements	5		
All Performance Measures Computed	15		
All Performance Measures Calculated Correctly	15		
Organized Reports (Key DVs and PMs)	5		
TOTAL	100	0	

The course syllabus for *MBA 6018 - Spreadsheet Analytics* was modified to include the four steps to improve student learning outcomes outlined above. Hereafter this course will utilize these resources and teaching practices. **Loop closed.**

#### *MBA 6019 - Managerial Finance*

The course is offered in the second semester of the program. Direct assessment data for learning outcome #2 (practical problems) from spring 2014 showed two opportunities to improve. First, spend more time bringing practical examples from the business environment to stimulate student thinking, and bring in more guest speakers and spend more time in class relating academic topics to items drawn from the financial press. Second, emphasize the qualitative aspects of assigned cases more than is currently done.

In the spring 2015 course offering, opportunities were created for students to come to grips with "real world" problems/practical examples through a series of cases that are progressively more complex. The course drew from real world events from the news to help students connect what they learned with what happened in the real world. The last case was a fairly complex strategic investment case based on a real company and students had to deal with various qualitative aspects in this case in addition to the quantitative calculations.

The average and median score on the last case was 143 and 145 respectively out of 150 points which translate to around 95%. Faculty provided support/guidance to the students and were generally pleased with the student performance. **Loop closed.**

#### *AN INTEGRATIVE EXERCISE*

In October 2014, the MBA program initiated an integrative exercise. Both Full-Time MBA cohorts were combined into a single 4-hour session with multiple faculty from different departments and semesters to work on a simulation exercise that integrated across disciplines.

First Year MBA students were assigned to mixed-cohort teams and asked to engage in a management simulation that requires them to process a great deal of data and synthesize their findings to make operational decisions that impact the operational and financial performance of the company over a simulated twelve month period.

The simulation exercise that has been used for the past two years is “Pricing Simulation: Universal Rental Car V2” HBS Product Number: 7005-HTM-ENG. The exercise requires the teams to utilize concepts from accounting and spreadsheets/analytics to set prices in a competitive industry, and to use concepts from their leadership course to figure out how best to collaborate in teams. In addition, this exercise previews and motivates concepts from marketing and economics courses that they will take later in the program.

#### Data Collection

At the conclusion of the simulation, quantitative and qualitative data were gathered from the students about their experience with the simulation. One goal of the MBA program is to continuously improve the learning outcomes that the students have while experiencing this simulation.

#### Discoveries from Year 1

The feedback on the 2014 simulation experience from the students was very positive. They reported that the experience helped them to understand concepts from several of their core courses and also helped them learn to interpret complex measures and business information.

In addition, two crucial pieces of constructive feedback emerged from running the simulation for the first time during the fall of 2014:

- The students expressed the concern that the version of the simulation used was too simplistic and less challenging than desired, which limited their ability to learn to interpret and understand operational and numerical complexity.
- In addition, there was a request for more Managerial Accounting background prior to the start of the simulation.

#### Closing the Loop Prior to Year 2

In response to the constructive feedback from the students, the faculty group administering the simulation made the following changes for fall 2015:

- Added additional complexity to the simulation (including a new market and more sophisticated models for both customer demand and competitor pricing behavior.
- A 90-minute lecture on Managerial Accounting methods was included prior to the start of the simulation.

#### Results from Year 2

Both of the changes that were made were observed to have a significant impact. Adding increased complexity to the simulation increased the level of focus and learning, as evidenced by the mean responses to the following evaluation question:

“This event enhanced my ability to interpret complex measures and information from a business”

- 2014 Mean: 3.71
- 2015 Mean: 3.97

The increased accounting preparation was also crucial in helping them interpret the monthly financial information, a crucial step for any team in order to be successful with the simulation. This was reflected in the simulated financial results produced by the winning and median teams, which were far stronger in 2015 than in 2014 (a direct numerical comparison is not feasible due to the significant change in complexity from 2014 to 2015).

#### Ideas for Year 3

One further improvement that emerged from qualitative feedback from some of the students was a desire to have more time for both the simulation and for the debriefing. The faculty are now considering various possibilities on how to incorporate more time into the simulation for the fall of 2016 Integrative Exercise. **Loop closed.**

## SOM, MBA - MBA Curriculum Map

Legend: (1) - Introduced, (2) - Moderate Coverage, (3) - Comprehensive Coverage

Learning Outcomes			MBA 6011 Managerial & Financial Accounting	MBA 6012 Ethics & Social Responsibility in Business	MBA 6013 Strategic Management in the Global Environment	MBA 6014 Leadership, Teams, and Organizations	MBA 6015 Sustainable Supply Chain Management	MBA 6016 Marketing	MBA 6018 Spreadsheets and Business Analytics	MBA 6019 Managerial Finance	MBA 6102 Macroeconomic Business Conditions
01) Fundamental Language and Skills			3	1	3	2	3	3	3	3	3
02) Practical Problems			2	2	2	2	2	2	3	2	1
03) Business Environment			3	2	3	2	2	2	3	2	3
04) Legal, Ethical and Social Concerns			2	3	2	3	3	2	1	2	2
05) Leadership and Communication Skills			1	2	3	3	2	2	1	2	2
06) Strategic Plans			1	1	3	2	2	3	1	3	1

### **Master of Science in Organizational Development (MSOD)**

**Mission Statement:** The Master of Science in Organization Development (MSOD) program develops working professionals to assume leadership roles in the transformation of organizations through its emphasis on academic rigor and ethical practice rooted in the Jesuit, Catholic tradition. Students learn relevant theory, gain interdisciplinary knowledge, and develop practical skills in organization assessment, diagnosis, intervention, and evaluation. The foundation of organization development is enhanced organizational effectiveness and resiliency, and the USF MSOD program focuses on team and organization change interventions necessary to create productive, compassionate organizations.

Since the last AACSB report in 2011 there have been changes to learning objectives, curriculum, specific courses, and required skills based on Plus/Delta feedback by students and faculty members. The new Program Goals and Learning Outcomes are:

#### **Program Goal 1 - Understanding the Foundations, Theories and Models of OD**

- **Learning Outcome: 1a Understanding the Foundations, Theories and Models of OD**  
Students will become familiar with the key concepts, research, theories and models in OD.
- **Learning Outcome: 1b Understanding the Foundations, Theories and Models of OD**  
Students will apply OD theories and models to change interventions in organizations.

#### **Program Goal 2 - Ability to Lead Change and Use Self-as-Instrument**

- **Learning Outcome: 2a Ability to Lead Change and Use Self-as-Instrument**  
Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback and implementing interventions adhering to the values and principles of OD practice.
- **Learning Outcome: 2b Ability to Lead Change and Use Self-as-Instrument**  
Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.

#### **Program Goal 3 - Proficiency in Organizational Inquiry, Research and Analysis**

- **Learning Outcome: 3a Proficiency in Organizational Inquiry, Research and Analysis**  
Students will become proficient in field research, participatory action research and related data collection methods (e.g., surveys, interviews, focus groups, observation).
- **Learning Outcome: 3b Proficiency in Organizational Inquiry, Research and Analysis**  
Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.

#### **Program Goal 4 - Competence with Teams, Culture and Diversity**

- **Learning Outcome: 4a Competence with Teams, Culture and Diversity**  
Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.
- **Learning Outcome: 4b Competence with Teams, Culture and Diversity**  
Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.

Based upon feedback from students and faculty over the past few years, a number of changes were made to the overall program. Areas identified for improvement included:

- Overlapping classes were confusing and disconnected
- Inconsistent teaching across classes
- Lack of timely feedback

In response to these concerns, several solutions were implemented, including:

- changing the Organizational Development format to eliminate overlapping classes
- began coaching and mentoring by the program director of faculty teaching OD classes (implemented spring of 2014 and ongoing)
- frequent exchanging of syllabi and course materials between faculty teaching the same courses (implemented Spring 2014 and ongoing)
- instituting program meetings each semester with OD faculty to discuss timely feedback and get commitment from faculty (implemented during spring 2014 semester and ongoing)

Examples of curriculum changes based on Plus/Delta feedback from students include changing two courses:

- *OD 683 - Statistics Fundamentals*
- *OD 684 - Finance & Accounting Fundamentals*

These two courses had been 1-unit required courses, but were perceived by students as either covering too much material in too short a time, or as covering material the students already knew. Program administrators and faculty changed the courses from one to two units, and students are now required to take just one of the two courses. By making each course two-units, students can now delve deeper into the subject material. This change was implemented in January 2015 and based on student feedback, this change has been effective.

The OD program employs various assessment measures, including:

*OD 690 – Organizational Development Culminating Project*

The Organizational Development culminating project measures all of the student learning outcomes in the program. The OD department uses a panel of faculty and OD practitioners to evaluate students' presentations and projects, and to give feedback. Based on the data from spring 2015 in which many students did not exceed expectations, program changes are being contemplated. Plans are to continue with the panel and to also have two independent raters assess the written project for attainment of learning outcomes.

- The Program Director is developing an assessment of learning instrument for first-year students to be used in pre-test and post-test assessment of OD knowledge, learning, and competencies.

In the *OD 690 – Organizational Development Culminating Project* course, a panel consisting of faculty and OD practitioners scored the presentations of the culminating project on all eight learning outcomes. The following two examples illustrate the students exceeding the target in one learning outcome and missing the target in another outcome (the students exceeded the target in four of the learning outcomes and missed the target in the other four learning outcomes.) The target set by the MSOD department is that at least 80% of the students should Exceed Expectations (scoring four or higher on a rubric with a five point scale). The culminating project course was designed to align with all eight MSOD learning outcomes. Examples of two results from the assessed learning outcomes (all eight were assessed) from the spring of 2015:

**Learning Outcome 2b - Ability to Lead Change and Use Self-as-Instrument** - Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.

- 100% of the students achieved a score of 4 or more points.

**Learning Outcome 3b - Proficiency in Organizational Inquiry, Research and Analysis** - Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.

- Only 44% of the students achieved a score of 4 or more points.



### OD Culminating Project - Actions for Underperforming Learning Outcomes

- Learning Outcome 1a and 1b.
  - Final Panel Assessment is not sufficient to assess key concepts, research and theories.
  - Program Director is designing an assessment for use in the *Understanding Behavior in Organization* class. This will take the form of a rubric embedded in the Canvas shell and the instructor for the course will assess a sample of students on learning outcomes 1a and 1b.
- Learning outcomes 3b
  - Program Director will meet with instructors for *Research and Analysis* class. Discuss steps to enhance students' qualitative and quantitative skills. Add content to the course as needed.
  - Discuss results with faculty and brainstorm ways for students to increase proficiency in this area.
  - Panel may not be best means to assess this learning outcome. Assessment in *Research and Analysis* class likely to have culminating project which instructor will assess.
- Learning outcome 4b
 

Currently the Academic Global Immersion (AGI) is an elective course. Program Director will discuss with stakeholders the importance of this competency and if AGI should be a required course.

The following is the rubric used by the panel to assess the learning outcomes in the culminating project course:

Program Goal	Learning Outcome	Did not meet expectations 0-1	Met expectations 2-3	Exceeded expectations 4-5
1) Understanding the Foundations, Theories and Models of OD	a) Students will become familiar with the key concepts, literature, theories and models in OD.	Did not demonstrate familiarity with OD concepts or theories.	Familiar with key concepts, theories and models.	Demonstrated significant mastery of concepts, theories and models.
	b) Students will apply OD theories and models to change interventions in organizations.	Did not apply appropriate OD theories and models to the project.	Applied appropriate OD theories and models to the OD culminating project.	Demonstrated significant skill at applying theories and models to the OD culminating project.
2) Ability to Lead Change and Use Self-as-Instrument	a) Students will develop skills in building collaborative, mutually trusting relationships in an organizational system, contracting with clients, defining goals, providing and receiving feedback and implementing interventions adhering to the values and principles of OD practice.	Did not develop skills or only demonstrated limited skills in these areas.	Developed skills and demonstrated proficiency in most of these areas.	Demonstrated exemplary skills in all of these areas.
	b) Students will practice self-reflection, skillful communication, effective negotiation and conflict resolution and self-care and use their own feelings as valuable information about how the organization functions.	Did not develop skills or only demonstrated limited skills in these areas.	Developed skills and demonstrated proficiency in most of these areas.	Demonstrated exemplary skills in all of these areas.

3) Proficiency in Organizational Inquiry, Research and Analysis	a) Students will become proficient in field research, participatory action research and related data collection methods (e.g., surveys, interviews, focus groups, observation).	Did not demonstrate proficiency in OD research methods.	Demonstrated proficiency in research methods for OD.	Showed exemplary ability in research methods for OD and all data collection methods.
	b) Students will be able to analyze qualitative and quantitative data, interpret findings, make data-based recommendations and evaluate effectiveness of interventions.	Did not demonstrate understanding or only limited facility in analysis.	Competently conducted both qualitative and quantitative analysis and linked findings to recommendations.	Demonstrated exceptional command of qualitative and quantitative analytic methods which informed evidence-based recommendations.
4) Competence with Teams, Culture and Diversity	a) Students will attain skills to effectively contribute to teams as well as develop and empower others to work effectively in team contexts.	Did not demonstrate ability to work effectively in and with teams.	Contributed positively in a team context and displayed skills in effective team work.	Demonstrated significant mastery of and effectiveness in working in and with teams.
	b) Students will understand the impact global culture and diversity inclusion has on organizational culture and will be able to work effectively across cultural perspectives.	Showed limited understanding of organizational culture and the impact global culture and diversity inclusion has on it.	Showed understanding of organizational culture and the impact global culture and diversity inclusion has on it.	Showed significant understanding of organizational culture and the impact global culture and diversity inclusion has on it.

#### MSOD Advisory Board

- Adjunct Faculty Tim Loney and Program Director, Jennifer Parlamis, initiated work on developing an advisory board in the Spring 2015. They crafted by-laws that were vetted by Peter DiGiammarino, a consultant who regularly works with executive boards. Suggestions for changes were integrated into a new document. See Advisory Board By-Laws document (with proposed changes) attached.
- The purpose of the MSOD Advisory Board is to foster excellence in the MSOD program. The MSOD Advisory Board will function in an advisory capacity to the program director of the MSOD program at the University of San Francisco (USF). The Advisory Board will make recommendations regarding the ongoing improvement of the MSOD program and will provide guidance to maintain a high caliber graduate program. The Advisory Board will also assist with raising funds, recruiting students, promoting collaborations, securing scholarships and facilitating networking opportunities for MSOD students and alumni. It has no legislative, administrative or programmatic authority and is advisory only. The Advisory Board will be an integral part of the MSOD program as it will bridge the gap between student experience, program content and learning, campus administration, and the “real world”.
- Tim Loney and Jennifer Parlamis are in the process of contacting recently identified board members.
- The first meeting of the MSOD Advisory Board will be April, 2016.

## SOM, MSOD - MSOD Curriculum Map

**Legend: (1) - Introduced, (2) - Moderate Coverage, (3) - Comprehensive Coverage**

Learning Outcomes	OD 660 Understanding Behavior in Organizations	OD 661 Leading Organization Change and Development	OD 668 Research and Analysis for Organization Development	OD 671 Consulting Practices	OD 672 Individual and Team Interventions	OD 673 Large-Scale Systems Transformation	OD 690 Organization Development Culminating Project
1a Understanding the Foundations, Theories and Models of OD	3				1		3
1b Understanding the Foundations, Theories and Models of OD		3			1		3
2a Ability to Lead Change and Use Self-as-Instrument	1	1	2	3	1		3
2b Ability to Lead Change and Use Self-as-Instrument	1	1	1	3	1	1	3
3a Proficiency in Organizational Inquiry, Research and Analysis			3				3
3b Proficiency in Organizational Inquiry, Research and Analysis			3		1	1	3
4a Competence with Teams, Culture and Diversity			2		3	1	3
4b Competence with Teams, Culture and Diversity	1				2	2	3

### **Executive Master of Business Administration (EMBA)**

**Mission Statement:** The mission of the Executive MBA Program is to prepare mid-career professionals from across the Bay Area for higher level leadership positions, career transitions, and new ventures by developing students' innovation and collaboration skills, analytic abilities, global perspective, ethical leadership capabilities, and professional communications skills. The program provides a rigorous foundation in core business and management concepts while also developing each student as a Whole Person.

**Program Goal 1 - Graduates will develop values-based leadership skills, greater self-awareness, and become ethical decision makers.**

- **Learning Outcome: 01) Core Competencies and Leadership Strengths**  
Identify and implement core competencies and strengths as a leader
- **Learning Outcome: 02) Prepare Data and Findings**  
Prepare data and findings and proposed partnerships in a way that is honest, transparent, and socially just.

**Program Goal 2 - Graduates will develop a global perspective of the business world.**

- **Learning Outcome: 03) Identify Ethical Challenges**  
Identify the challenges of conducting business efficiently and ethically in the global environment.
- **Learning Outcome: 04) Operate in Global Marketplace**  
Operate in the ever-changing global marketplace.

**Program Goal 3 - Graduates will analyze data and effectively apply analysis and theory to business problems and proposed solutions.**

- **Learning Outcome: 05) Analyze information and data**  
Analyze and apply information and data to business decisions.
- **Learning Outcome: 06) Formulate Strategic Plans**  
Formulate well thought out strategic plans and vision for future business decisions.

**Program Goal 4 - Graduates will attain a functional understanding of all core business areas.**

- **Learning Outcome: 07) Create Cohesive Plans**  
Synthesize ideas from various business areas into a cohesive, creative plan or vision.
- **Learning Outcome: 08) Summarize Basic Principals of Business Areas**  
Summarize basic principles of all main business areas, including accounting, finance, strategy, management, marketing, supply chain management, and business law.

Since the last AACSB report, a number of curriculum updates and changes were made as a result of a combination of the experience of the new Director of the Executive MBA program with ranked EMBA programs; information gathered at EMBA conferences and daily newsfeed updates; discussions with corporate leaders, including our own current students in managerial positions; plus regular review of curricula in leading EMBA programs. New and updated courses include:

#### *EMBA 6909 - Business Law*

Business leaders need a fundamental knowledge of law in order to make sound legal business decisions. A working knowledge of corporate governance, antitrust law, contract law, employment law, liability, regulations, and many other areas is critical for students to learn in an EMBA program. Business executives find that an understanding of the law enhances their ability to evaluate risk, make strategic decisions, and conduct day-to-day operations. It provides the relationship of law with ethics and current controversies in business, from employment law to antitrust to corporate and securities law.

#### *EMBA 6913 - Supply Chain Management*

Even more valuable than simply operations management to corporate leaders is a comprehension of global supply chains and risk management. In today's global economy, the creation of value often requires careful coordination of

activities across the boundaries between functions, firms and countries. In short, firms that learn how to leverage their supply chains can obtain speed, innovation, dependability, flexibility, cost and/or quality benefits that go far beyond those potentially realized from solely optimizing internal operations. The USF EMBA is preparing our students to understand all aspects of supply chain management.

#### *EMBA 6917 - Entrepreneurship*

Leading EMBA and MBA programs in the Bay Area are shifting their programs to emphasize their Entrepreneurial focus. In addition, programs around the country are highlighting their "advantage" in entrepreneurial leadership. The USF EMBA expects to take advantage of being in San Francisco/Silicon Valley and leverage that proximity with our enhanced content.

#### *EMBA 6920 - Applied Innovation*

An Innovation course is one of the most sought after courses in an MBA program. In order to remain relevant, an Applied Innovation course applicable to business leadership must be included. Applied Innovation expands the creative thinking of the student and broadens strategic skills and business perspective as they solve real problems today and evaluate future business opportunities and challenges. According to leading experts in MBA curriculum, change and innovation are mandatory for organizations to remain relevant and solvent and this course prepares our students to lead their organizations.

#### *EMBA 6997 - Global Business Practicum*

The Global Business Practicum (GBP), EMBA 6997, was used to assess the following Learning Outcomes (LOs) in both 2014 and 2015:

- **Learning Outcome: Operate in Global Marketplace**  
At the completion of the USF Executive MBA program graduates will be able to operate in the ever-changing global marketplace.
- **Learning Outcome: Analyze information and data**  
At the completion of the USF Executive MBA program, graduates will be able to analyze and apply information and data to business decisions.
- **Learning Outcome: Formulate Strategic Plans**  
At the completion of the USF Executive MBA program, graduates will be able to formulate well thought out strategic plans and vision for future business decisions.
- **Learning Outcome: Create Cohesive Plans**  
At the completion of the USF Executive MBA program, graduates will be able to synthesize ideas from various business areas into a cohesive, creative plan or vision.

#### **Direct Assessment:**

To assess the GBP in 2014, three independent instructors evaluated the final oral presentations, with *combined* results as follows:

**Operate in Global Marketplace:** Exceeded expectations (EE): 2 Met Expectations (ME): 11 Below Expectations (BE): 1

**Analyze information and data:** EE: 4; ME: 6; BE: 4

**Formulate Strategic Plans:** EE: 3; ME: 7; BE: 4

**Learning Outcome: Create Cohesive Plans:** EE: 3; ME: 6; BE: 5

It was decided that we would continue with another year of assessment before making any substantive changes.

**Indirect Assessment:**

Indirect assessments were conducted in the following ways: 1) student surveys, both formal and informal, 2) consultation of faculty (both 2014 and 2015) with program staff and students (focus groups).

The following observations have emerged:

- The global experiential portions were valuable, though these did not always transfer to the first LO above
- Although many company visits were extremely valuable, others were less so. Suggested improvement: work more closely with external providers of visits to ensure better fit of student needs and company visits
- Curriculum timing/planning: student and faculty feedback suggests that Entrepreneurship course would be better suited earlier (relative to GBP) in program to allow students to better utilize learned skills in course in developing GBP projects
- Focus: Create clearer focus for projects; currently, projects span a wide spectrum of topics which detracts from the ability of faculty to assist with learning and from students to provide valuable feedback to each other

**Plans for future:**

- Work with external provider to create more consistently valuable visits
- Revise course description to allow for clearer focus
- Revisit curriculum sequencing to provide better learning opportunities in the GBP

### Rubric for Global Business Practicum Presentations

	Exceeds Expectations	Meets Expectations	Below Expectations
Oral Skills	Coherence of presentation strongly supported by correct pronunciation, confident enunciation and articulation. Pauses are purposeful and enhance fluency of speech. Virtually no vocalized fillers are noticeable. Effective organization well suited to purpose. Main points are clearly distinct from supporting details. Graceful transitions create coherent progress toward conclusion.	Careful pronunciation supports coherence of presentation. Enunciation and articulation of words are mostly clear. Pauses were momentary and did not interrupt fluency of speech. Vocalized fillers are minimal and do not distract the audience. Clear organizational pattern. Main points are distinct from supporting details. Smooth transitions differentiate key points.	Pronunciation is mostly correct yet enunciation and articulation are still tentative. Speaker recovers from awkward pauses and proceeds. Vocalized fillers are noticeable but not excessive. General structure/organization seems adequate. Difference between main points and supporting details is blurred. Logical flow, but no clear signposts for transitions.
Analyze & Frame Problems	The team has evaluated and used the correct methodology to analyze quantitative data, determining any needs for additional or different data. Where analyses are incorrect or inadequate, the team has identified the inadequacies and made or suggested appropriate corrections to improve the validity of decisions. The report is ready for professional presentation.	The team has evaluated the extent of the correct methodology needed to analyze quantitative data, determining any needs for additional or different data. Where analyses are incorrect or inadequate, the team has identified the inadequacies and attempted to resolve them. Additional analyses are needed prior to presentation to the company.	The team has evaluated the correct methodology to analyze quantitative data. Problems in methodology were identified correctly, but the corrections suggested were neither correct nor attempted. Significant work on the report is still needed.
Operate in the global marketplace.	Shows deep understanding of key firm level issues and practices in managing global firms or conducting international business, shows an ability to conduct sophisticated analyses of global business operations and offer recommendations to help companies capture new business opportunities and improve their competitiveness.	Is able to identify and analyze key firm level issues and practices of managing global companies and international businesses (e.g. pros, cons, and conditions of various international business practices).	Is able to identify and have a basic understanding of key firm level issues affecting the global firm and international business.
Formulate strategic plans and vision for future business decisions.	Shows forethought and analysis across all key areas of plan.	Shows some forethought and analysis in plan, but misses a few key areas.	Does not show any forethought or analysis in plan,
Synthesize ideas from various business areas into a cohesive, creative plan or vision.	The team seamlessly integrates concepts together, presents ideas in a clear, cohesive, and creative manner.	The team adequately integrates concepts from different disciplines into business plan, though audience is still left with unanswered questions.	The team fails to clearly and coherently integrate different business areas into a plan.

## SOM, EMBA - EMBA Curriculum Map

Legend: (1) - Introduced, (2) - Moderate Coverage, (3) - Comprehensive Coverage

Learning Outcomes	EMBA 6901 Negotiations	EMBA 6902 Leadership & Teams	EMBA 6903 Financial Accounting	EMBA 6904 Mgr. Acct	EMBA 6905 Finance	EMBA 6906 Global Business Conditions	EMBA 6907 Exec. Strategic Comm.	EMBA 6908 Global Mkts & Tech Trends	EMBA 6909 Bus. Law	EMBA 6910 Mgr. Econ	EMBA 6911 Mkt.	EMBA 6912 Decision Modeling Data Analysis	EMBA 6913 Supply Chain Mgt	EMBA 6915 Ethics & Social Responsibility	EMBA 6917 Entre- preneurship	EMBA 6919 Strategic Mgt.	EMBA 6920 Applied Innovation	EMBA 6929 Change Mgt.	EMBA 6952 Mgt. & Strategy in Global Env.	EMBA 6997 GBP
Core Competencies and Leadership Strengths	1	3		1			2							1		1	3		1	
Prepare Data and Findings	2	1	3	3	1				2		1	1		3	2					
Identify Ethical Challenges						3							2	2				2	3	3
Operate in Global Marketplace				1		2		2					1			1	2	2	3	3
Analyze information and data			2	2	3	2		2		3	2	3	1	3			2		2	2
Formulate Strategic Plans		1			2		2	2						2	3	2	2	2	2	2
Create Cohesive Plans							1								2	2	3			3
Summarize Basic Principles of Business Areas	2	1	2	3	2	1	2		2	2	3	2	2	1	1	2	2	2	2	



### **Master of Science of Financial Analysis (MSFA)**

**Mission Statement:** The Masters of Science in Financial Analysis is designed to train students as financial analysts and investment managers by providing quantitative training in statistics, economics, finance, and accounting backed by an understanding of the importance of ethical standards to the functioning of financial markets.

The MSFA program supports the School of Management mission to be one of the premier teaching, research and networking platforms for managerial education, one that is regionally anchored, nationally recognized and globally connected.

The MSFA has been a nationally recognized Academic Program Partner of the CFA Institute since 2006. The program recruits students from both the Bay Area and internationally. Our alumni can be found at the premier investment management firms in the Bay Area and at investment management firms throughout Asia.

The master's degree in financial analysis is unique in that its program goals are explicitly tied to those of the Chartered Financial Analyst (CFA®) designation Comprehensive Body of Knowledge (CBOK). The CFA® designation is administered by the CFA Institute and requires candidates to pass three exams which are offered annually worldwide. The CFA Institute conducts ongoing surveys of its members (CFA® charter holders, other investment professionals, and investment firms worldwide) to determine periodic changes to the CBOK.

The MSFA program has been an academic program partner of the CFA Institute since 2006. To become an academic program partner, a university and program must fulfill a set of qualifications outlined in the CFA® program partnership. In particular, the MSFA program had to show that it covered more than 70% of the learning outcome statements (LOS) that comprise the CFA® CBOK, used CFA® -approved texts in the MSFA programs, met accreditation standards, and have a minimum number of credit hours for graduation.

The MSFA program was judged to meet the required standards; in particular, the coverage of very detailed LOS's associated with the three levels of the CFA® exams. The document, MS in Financial Analysis Curriculum to CFA® CBOK, provides a mapping from the CFA® LOS areas to the relevant MSFA courses. This was submitted to the CFA Institute as part of the academic program partnership process, along with detailed syllabi from each course in the MSFA program, and approved by the CFA Institute as covering the CFA CBOK.

The CFA® CBOK learning objectives are very specific statements regarding knowledge that a student should have in a variety of topic areas to be prepared for a career in financial analysis or investment management. MSFA courses strive to achieve understanding and ability to implement CFA's higher level goals using the tools and theories set out specifically in the CFA® CBOK LOS. The CFA Program Goals include:

1. Framework for ethical conduct in the investment profession by focusing on the CFA Institute Code of Ethics and Standards of Professional Conduct as well as the Global Investment Performance Standards (GIPS®).
2. Fundamental quantitative techniques essential in almost any type of financial analysis including (i) the time value of money, (ii) basics of statistics and probability theory, (iii) probability theory applied in the field of investment valuation and financial risk management, and (iv) joint behavior of two or more variables, including correlation and linear regression.
3. Thorough knowledge of macroeconomic and microeconomic principles, including the key components of economic activity, macroeconomic theory and policy, international trade, and exchange rates. Develop expected returns and risks for asset classes and individual assets based on macro- and micro-expectation factors.

4. Thorough knowledge of financial accounting procedures and rules. Able to (i) analyze and use financial statements and accompanying disclosures in the investment valuation process; (ii) analyze a company's liquidity, profitability, financial stability, solvency, and asset utilization; and (iii) analyze the effects of alternative accounting methods and assumptions.
5. Thorough knowledge of the analysis of equity investments, including securities markets, efficient market theory, the analysis of equity risk and return (for industries and companies), and technical analysis. Apply to the management of equity portfolios, including global investments.
6. Thorough knowledge of the analysis of fixed income investments, including basic characteristics of bonds in alternative sectors, valuation tools, and factors that influence bond yields. Develop strategies for fixed income portfolios.
7. Thorough knowledge of the analysis of derivative investments, including forwards, futures, options, and swaps.
8. Working knowledge of the analysis of alternative investments, including mutual funds, exchange traded funds, real estate, venture capital, hedge funds, closely held companies, distressed securities, and commodities and commodity derivatives. Develop strategies for incorporating alternative assets in multi-asset portfolios.
9. Specify and quantify investor objectives, constraints, and preferences in terms of return requirements and risk tolerances, and develop an appropriate investment policy statement; document approved investment policies; recommend an appropriate asset allocation based on return and risk; develop strategies for managing portfolios of domestic and foreign debt securities, including passive, semi-active, and active management techniques; develop strategies for managing portfolios of domestic and foreign equity securities, including passive, semi-active, and active management techniques that incorporate different management styles; and manage portfolio risk and adjust risk exposure with derivative securities.

The MSFA program is explicitly built on a set of LOS's that are professionally designed to reflect a body of knowledge that is continually updated to reflect the needs of the investment management profession. The MSFA program also uses finance and investment management professionals who are CFA charter holders to deliver a significant portion of the MSFA program. Approximately 40 percent of the program is concentrated in courses involving case studies and applications of techniques.

The MSFA program's goals and learning outcomes which incorporate the CFA Program Goals include:

**Program Goal 1 - Apply quantitative methods and analytic tools from economics, statistics, finance and accounting to value and manage portfolios of financial assets.**

- **Learning Outcome: 1-1 Analytical Tools – Finance**  
Employ fundamental quantitative techniques essential in financial analysis and investment management including (i) the time value of money, (ii) the basics of statistics and probability theory, (iii) probability theory applied in the field of investment valuation and financial risk management, and (iv) joint behavior of two or more variables, including correlation and linear regression.
- **Learning Outcome: 1-2 Analytical Tools – Economics**  
Recognize and explain how macroeconomic and microeconomic events impact key components of economic activity, including industry structure, firm profitability, macroeconomic output, prices, interest and exchange rates.
- **Learning Outcome: 1-3 Analytical Tools – Accounting**  
Describe and interpret financial accounting concepts and measurements to (i) use financial statements and footnotes to analyze an investment valuation; ii) analyze a company's liquidity, profitability, financial

stability, solvency, and asset utilization; and iii) analyze the effects of alternative accounting methods and assumptions on firm valuation.

**Program Goal 2 - Integrate economics, statistics, and financial concepts to analyze and assess the value of financial assets.**

- **Learning Outcome: 2-1 Integration - Equity Valuation**  
Discuss and evaluate the techniques used to analyze the value of equity investments, in securities markets using efficient market theory and the analysis of risk and return in equity portfolios.
- **Learning Outcome: 2-2 Integration - Fixed Income Valuation**  
Analyze fixed income investments using the characteristics of bonds and factors that influence bond yields. Develop strategies for fixed income portfolios.
- **Learning Outcome: 2-3 Integration - Derivatives Valuation**  
Analyze the sources of value in derivative investments, including forwards, futures, options, and swaps, and demonstrate how derivatives are used to manage risk in the investment process.

**Program Goal 3 - Describe the standards of ethical behavior in financial markets and financial regulations and evaluate how these standards apply in specific situations.**

- **Learning Outcome: 3-1 Ethics – Standards**  
Describe the framework for ethical conduct as set out in the CFA Institute Code of Ethics and Standards of Professional Conduct and Global Investment Performance Standards (GIPS®).
- **Learning Outcome: 3-2 Ethics – Evaluation**  
Evaluate and assess how these standards have, or have not been, followed in specific investment situations. Discuss how the CFA ethical standards relate more broadly to ethical values.
- **Learning Outcome: 3-3 Ethics - Duties to Investors**  
Specify and quantify investor objectives, constraints, and preferences and develop an appropriate investment policy statement. Develop strategies for managing portfolios of domestic and foreign debt and equity securities including the use of derivative securities to adjust risk exposure to meet the investor policy goals.

An example of tying course work to learning outcomes is in a course project in *MSFA 726 Advanced Financial Statements (Learning Outcome 1-3 Analytical Tools – Accounting)*. The students performed research and wrote a paper and analyzed a publicly-traded company in Equity Valuation and Advanced Financial Statements. The results are based on a final paper where groups of 4-5 students had to analyze the financial results of two comparable companies using competitive analysis backed up by the appropriate financial ratios. The scores on the final paper were based on a rubric in 10 areas that all papers were scored against with each rubric evaluated as Excellent (5 pts.), Good (4 pts.), Satisfactory (3 pts.), and Unsatisfactory (2 pts.). All of the students, except one who did not submit a final paper, scored near the "good" level of 40/50.

Curriculum changes and assessment of learning activities in the MSFA program include:

#### *Economics 730 - Behavioral Finance and Risk Management*

The course is offered in the third semester of the Professional MSFA program, which was originally designed as a "Computer Models for Finance" course. Its purpose was to train students in the spreadsheet skills necessary to implement some of the valuation models for equity, fixed income, and derivative instruments they had learned in the first two semesters. It was decided to replace the course with one that fit better with the material on investment management and investor risk behavior that several fourth semester courses emphasized. The new ECON 730 course, Behavioral Finance and Risk Management, was restructured around recent changes in the CFA Body of Knowledge at Level III to emphasize the centrality of this topic for understanding investor behavior and determining appropriate risk-return for investor portfolios. This course aligns with MSFA learning outcome 3-2 Ethics – Evaluation.

Several of the program learning outcomes were assessed using direct measures.

**Learning outcome 1-1 Analytical Tools – Finance** was measured by the CFA Review quiz (Quantitative Methods section) in the fall of 2015. All of the students achieved a score of at least ninety percent on the test and the target was met.

**Learning outcome 1-3 Analytical Tools – Accounting** was measured using research and a paper with analysis of a publicly traded company in *MSFA 720 – Equity Valuation* and *MSFA 726 – Advanced Financial Statement Analysis* in the spring of 2015. All students scored ‘Good’ except for one student who did not submit a final paper. The results are based on a final paper where groups of 4-5 students had to analyze the financial results of two comparable companies using competitive analysis backed up by the appropriate financial ratios. The scores on the final paper were based on a rubric in 10 areas that all papers were scored against with each rubric evaluated as Excellent (5 pts.), Good (4 pts.), Satisfactory (3 pts.), and Unsatisfactory (2 pts.). Target met.

**Learning outcome 2-1 Integration, Equity Valuation** was measured in the spring of 2015 with a course-embedded assignment Investment Portfolio Analysis – Part 1. The assignment was a student group project evaluating a company and setting a valuation target for the company’s shares based on an integrated set of financial statements and discounted cash flow analysis.

All group’s presentations and final projects were evaluated by the professor and a panel of four NYC investment bankers/analysts as meeting the requirements. Target met.

**Learning outcome 3-1 Ethics Standards** was measured using the CFA Review Online program quiz on the Level I Ethics section in the fall of 2015. Prior to taking the quiz, all students completed the online CFA Institute training in Ethics (14 hours across 7 areas) and ALL students received the set of completion certificates from the CFA Institute. However, NO students achieved a result of 75% or better on the Ethics Assessment exam. Thus the online Ethics training did NOT accomplish its goal.

The prior in-class version of the course was not specific enough to map to the CFA Ethics learning outcomes. This was the main reason for moving to an online course format developed specifically by the CFA Institute to cover the Ethics learning outcome statements. In the Fall of 2015, the MSFA program moved to the online CFA Institute Ethics format where students take 14+ online hours studying the CFA Institute Ethical Standards. The expectation was for improved outcomes on the specific CFA Ethics learning outcomes.

All students received Certificates of Completion for all 7 Ethics modules from the CFA Institute. Unfortunately, on a short assessment exam that placed these Ethical Standards in real life situations, only 12.5% of these same students met the Satisfactory level (75% correct). For Spring 2016, we will modify the course so there is more live class sessions to discuss the Ethical Standards in real-life investment situations.  
**Loop closed.**

## SOM, MSFA - MSFA Curriculum Map

Legend: (1) - Introduced, (2) - Moderate Coverage, (3) - Comprehensive Coverage

Learning Outcomes	MSFA 710 Micro-economics for Finance	MSFA 712 Financial Markets	MSFA 714 Corporate Finance	MSFA 716 Macro-economics for Finance	MSFA 720 Equity Valuation	MSFA 722 Fixed Income Valuation	MSFA 723 Applied Investment Analysis	MSFA 724 Derivatives I	MSFA 725 AGI: US Financial Markets & Regulation	MSFA 726 Advanced Financial Statement Analysis	MSFA 728 Ethics & Finance I	MSFA 730 Behavioral Finance for Risk Mgt	MSFA 732 Derivatives II	MSFA 734 Int'l Finance	MSFA 736 Econo- metrics	MSFA 738 Fixed Income Valuation II	MSFA 740 Capital Market Theory	MSFA 742 Alternative Investments	MSFA 744 Fin. Econo- metrics	MSFA 746 Portfolio Mgt	MSFA 748 Ethics & Finance II
1-1 Analytical Tools - Finance	1	1	1	1											3				3		
1-2 Analytical Tools - Economics	3	1		2		3	3		3					3							
1-3 Analytical Tools - Accounting		1	1		2		3			3											
2-1 Integration - Equity Valuation	1	2	2		3		3		3	3										2	
2-2 Integration - Fixed Income Valuation		1				2		2					3			3				2	
2-3 Integration - Derivatives Valuation								3					3				2			2	
3-1 Ethics - Standards		1							1, 2		2										2
3-2 Ethics - Evaluation		1							2		3	2								2	3
3-3 Ethics - Duties to Investors		1	1														1	2		3	3

MS in Financial Analysis Program Rubric

Outcome	Very Poor Achievement of Outcome	Poor Achievement of Outcome	Average Achievement of Outcome [Benchmark Standard]	Good Achievement of Outcome	Very Good Achievement of Outcome
1. Student understands the framework for ethical conduct in the investment profession	Can state some of the CFA Code of Ethics but unable to apply systematically to any real world scenarios.		Can state most of the CFA Code of Ethics and apply to simple real world scenarios but not more complex situations.		Can state the CFA Code of Ethics and apply to both simple real world scenarios and more complex situations.
2. Student demonstrates mastery of the fundamental quantitative techniques essential in financial analysis and investment management	Can solve simple problems in the fundamental areas but is not able to complete complex problems.		Can solve complex problems in the fundamentals in a textbook situation but cannot apply to real world examples.		Can solve complex problems in the fundamentals in a textbook situation. Also is able to apply these tools to real world examples.
3. Student understands macroeconomic and microeconomic principles and can develop expected returns and risks for asset classes and individual assets	Can set up simple micro and macro models, but is unable to analyze impact on asset returns.		Can set up and use complex micro and macro models to analyze textbook problems but unable to apply to real world asset returns.		Can set up and use complex micro and macro models to analyze both textbook problems and also develop models for real world expected asset returns.
4. Student understands financial accounting and is able to use these measures to value a firm and its financial instruments.	Can take the appropriate numbers from financial statements to use in valuation ratios and model inputs.		Can adjust simple financial statements to reflect underlying economic value for use in model input and ratios		Can use complex financial statements of real company to find, adjust and evaluate the numbers required for valuation models and ratios.
5. Develop a comprehensive knowledge of the analysis of equity investments.	Can solve simple models of equity valuation and conduct simple CAPM calculations.		Can solve complex models of equity valuation and understands how to construct diversified portfolios of equities.		Can apply complex models of equity valuation to real world and can evaluate equity portfolios in terms of risk and return.
6. Demonstrate the ability to analyze fixed income investments.	Can solve valuation models for standard fixed income instruments.		Can solve valuation models for complex fixed income instruments.		Can apply complex models of fixed income valuation to real world and can evaluate instruments in terms of risk and return.
7. Demonstrate knowledge of derivative instruments and how they are used to manage risk in the investment process.	Can solve simple models for the valuation of plain vanilla derivatives such as options and futures.		Can solve models for the valuation of both plain vanilla and more complex derivative instruments.		Can solve models for the valuation of complex derivative instruments and construct hedging strategies using these instruments.
8. Understand how alternative investments, can be incorporated into multi-asset portfolios to improve risk-return trade-offs.	Can define the various alternative asset strategies and asset classes.		Can explain the various alternative asset strategies and analyze the implications for risk and return trade-offs.		Understands the various alternative asset strategies and is able to recommend strategies to use these assets to achieve risk-return goals in multi-asset portfolios.
9. Be able to specify and quantify investor objectives, constraints, and preferences in terms of return requirements and risk tolerances, and develop an appropriate investment policy statement.	Can state investment objectives, constraints and preferences but is unable to analyze textbook situations adequately.		Can state investment objectives, constraints and preferences but is unable to develop real world policy goals and statements.		Can state investment objectives, constraints and preferences and analyze real world investor situations to develop investor policy goals and investment policy statements.

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### **Master of Global Entrepreneurship and Management (MGEM)**

**Mission Statement:** The mission of the Master of Global Entrepreneurship and Management (MGEM) program is to provide students with high quality cross-cultural immersion experiences in three countries, to develop the knowledge, skills and attitude necessary to work and succeed in new and fast growing global businesses.

The Master in Global Entrepreneurship and Management degree was launched in the fall of 2009, and in the fall of 2014, the degree became a joint degree, accredited by the Western Association of Schools and Colleges (WASC) through its substantive change process. A joint diploma is now issued by three universities, which are all accredited by AACSB: USF, Fu Jen University in Taipei, Taiwan; and Instituto Químico de Sarria (IQS School of Management) in Barcelona, Spain. Under WASC guidelines, the degree was renamed the Joint Masters in Global Entrepreneurial Management (MGEM). The MGEM degree aligns with the Vision, Mission, and Values of the University of San Francisco, which calls on USF to be “internationally recognized as a premier Jesuit Catholic, urban University with a global perspective that educates leaders who will fashion a more humane and just world,” and reflects the School of Management’s Mission to ensure “global diversity and entrepreneurship energy.”

#### **Program Goal 1 - Prepare students to be passionate, ethical and effective global leaders.**

- **Learning Outcome: 01) Lead and Manage Diverse Individuals**  
Students in the Master in Global Entrepreneurial Management will be able to demonstrate the ability to lead and manage diverse individuals and groups to facilitate organizational performance.
- **Learning Outcome: 02) Identify the Ethical and Professional Responsibilities**  
Students in the Master in Global Entrepreneurial Management will be able to identify the ethical and professional responsibilities of a global entrepreneur.
- **Learning Outcome: 03) Effective Communication**  
Students in the Master in Global Entrepreneurial Management will be able to use verbal and written communication effectively across different mediums
- **Learning Outcome: 04) Demonstrate and Apply Knowledge**  
Students in the Master in Global Entrepreneurial Management will be able to demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions.
- **Learning Outcome: 05) Identify and Analyze Financial Information**  
Students in the Master in Global Entrepreneurial Management will be able to identify and analyze financial information to make effective managerial decisions.

#### **Program Goal 2 - Instill multi-cultural fluency by participation in a cultural diverse student cohort, multi-cultural and multi-lingual faculty and the opportunity study in Asia, Europe and North America.**

- **Learning Outcome: 01) Lead and Manage Diverse Individuals**  
Students in the Master in Global Entrepreneurial Management will be able to demonstrate the ability to lead and manage diverse individuals and groups to facilitate organizational performance.
- **Learning Outcome: 02) Identify the Ethical and Professional Responsibilities**  
Students in the Master in Global Entrepreneurial Management will be able to identify the ethical and professional responsibilities of a global entrepreneur.
- **Learning Outcome: 03) Effective Communication**  
Students in the Master in Global Entrepreneurial Management will be able to use verbal and written communication effectively across different mediums

- **Learning Outcome: 04) Demonstrate and Apply Knowledge**

Students in the Master in Global Entrepreneurial Management will be able to demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions.

**Program Goal 3 - Teach the students the skills necessary to develop a unique idea for a new business or a new product and or service within an existing firm.**

- **Learning Outcome: 03) Effective Communication**

Students in the Master in Global Entrepreneurial Management will be able to use verbal and written communication effectively across different mediums

- **Learning Outcome: 05) Identify and Analyze Financial Information**

Students in the Master in Global Entrepreneurial Management will be able to identify and analyze financial information to make effective managerial decisions.

Program Impact

In the MGEM program, students study and observe global and cross-cultural aspects of business decisions within entrepreneurial firms, including multi-national corporations, domestic companies, select startups, social entrepreneurial organizations, and international or domestic nonprofits. The program offers courses that are practitioner-oriented and delivered in a sequence that maximizes the unique locations of the three partner schools. Unlike other study-abroad programs that offer students the option to travel to another continent for one semester, the MGEM cohort travels to a new continent in each of the three semesters, thus ensuring a deep understanding of how to conduct business on a global scale. The diverse student body comes from countries located in the Middle East, Africa, Asia, Europe, and the Americas. As a result, most MGEM students develop life-long friendships and build a global network composed of their peers, professors, and successful entrepreneurs.

After graduation, students typically secure jobs and competitive internships in a variety of multi-national and transnational companies, international organizations, service agencies, and startup companies. A number of MGEM alumni have started their own businesses or joined family businesses as evidenced through the LinkedIn-based survey occasionally conducted by the SOM Alumni Relations department. For example, a recently graduated alum started his own enterprise, manufacturing and distributing laser equipment in Spain. Another recent alum advanced his large family business of unique bee-keeping and honey production utilizing sustainable and environmentally-friendly resources. On the basis of the most recent exit survey, over 90% of MGEM students reported having strong career leads, job offers, or clear intentions to work for innovative entrepreneurial companies in the tech, retail, and manufacturing sectors or in social entrepreneurship- focused organizations, many operating globally. The program's stated learning outcomes and competencies that students develop in the program translate well into the students' professional development opportunities and career prospects.

During the program and after graduation, students have reported significantly increased intercultural competence (program goal #2 and learning outcome #4); basic (and sometimes intermediate) Spanish and Mandarin language skills (as reported by non-native speakers) due to their residence in Spain and Taiwan (in addition optional recommended language courses at IQS and FUI); strong managerial competence, including a much greater confidence as business managers and leaders, much improved communication skills (both verbal and written – learning outcome #3); greater awareness of and appreciation for different types of for-profit and nonprofit entrepreneurial organizations and their structural and behavioral characteristics; overall competence and analytical skills related to various areas of global management, technology, innovation, partnerships and alliances (program goal #4).



End-of-program surveys have indicated the students generally feel less confident about their financial management and analytical skills by not having had sufficiently in-depth finance curriculum coverage and assessment, and other related curricular and programmatic limitations due to the relatively short program format.

#### Program Engagement

In addition to classroom instruction, students engage with entrepreneurial firms through consulting opportunities in Asia, Europe, and the United States. In the classroom, cases and business problems are employed to simulate the tools and skills required to solve real-life problems (learning outcome #2). In each of the three regions of instruction, students visit various entrepreneurial companies. Examples of past visits include (in Europe): TOUS, Port de Barcelona, MANGO, Desayuno Clothing, SEAT, PUIG, EUROFRAGRANCE, Barcelona Activa, Torres (wine-making), DAMM; (in Taiwan/China): Taiwan Semiconductor Manufacturing Company (TSMC) Limited, Industrial Technology Research Institute, Alibaba Group, China (Shanghai) Pilot Free Trade Zone, Shanghai Futures Exchange; (in the United States): Kleiner, Perkins, Caulfield and Byers (KPCB), Kiva, GooglePlex, Google Earth, Cisco Meraki, Annie's, Gordon Biersch, Fair Trade USA, the Keiretsu Forum (the world's largest international angel investment network), and Facebook.

The consulting projects are scoped and managed by a professor of consultancy in the regions where they occur. Consulting clients have included but are not limited to Aqualogy, Coca Cola, SB Architects, Energy Management, FinSix, Goodwill, Project Open Hand, UP Global (Startup Weekend), Worldreader, BLAP Productions, the Keiretsu Forum, MANGO, Port de Barcelona, and others. Students maintain relationships with the companies that often lead to post-program internships, projects, and jobs either at those companies or at their affiliates/ partners.

Student engagement in courses and with business consulting clients and partners is stimulated and constantly monitored by faculty in almost all of the courses of the program. Overall interaction and student- team and individual performances are assessed using rubrics and other instruments of assessment and feedback provision, especially in courses such as the initial Consulting Projects course in Barcelona (IQS), final Consulting Projects course in San Francisco (USF), Business Plan (now Special Topics in Global Entrepreneurship and Management), Cross-Cultural Management and Ethical Business Practice, Cross-Cultural Marketing and Integrated Marketing Communication, and others. In addition, the program's regularly conducted exit survey of graduating students over the last few years has been another channel to collect program-specific data and maintain (or increase) the MGEM student engagement with, and a responsibility for, the program and courses' curriculum.

Many MGEM students and alumni maintain life-long friendships that has led to the creation of a global network of entrepreneurs and global business professionals who interact and support each other academically and professionally. Preliminary work has started by notable program alumni and Program Directors with some staff support to launch the MGEM Alumni Society by Fall of 2016 or sooner. Also being planned is an active community interest group which will further enhance the program engagement among its members with a wide variety of local, regional, and global business, government, and nonprofit communities.

The Alumni Society will act as a catalyst for the program development and engagement beyond its natural confines and regular processes, involving program faculty, staff, administrators, and the program's business partners and clients. The Society is also expected to conduct annual alumni surveys and actively participate in the MGEM employers' survey design and administration which the MGEM program leadership is hoping to launch in late 2015 - early 2016 in conjunction with the respective schools' regular cycles of employer and other external stakeholders - related survey re-design and data collection. Annual alumni surveys will add to current assessment efforts to help enhance the program and course curriculum, especially for the design, criteria, and deliverables of the Consulting Projects (two courses), Business Plan, Innovation Technology Management, and Emerging Trends in Entrepreneurship, Innovation, and Social Impact courses.

### Program Innovation

The MGEM program is innovative in its design (a three-university partnership), including a combination of classroom instruction in three countries with a wide variety of experiential and immersion learning activities. Program innovation includes an immersion trip to China while studying in Taiwan; global entrepreneurial business immersion on three continents (Europe, Asia, North America) via company visits; company-based business consulting projects, such as creating new programs for socially disadvantaged clients; conducting research and analysis of new markets; organizing entrepreneurial promotional events; and pivoting products and services while developing new business ideas.

Faculty who teach Consulting Project courses work with both student teams and placement companies to facilitate real-life practical learning while contributing to the company's and organization's value proposition. The creative and sustainable partnerships between MGEM and entrepreneurial organizations that emerged as a result of these projects and collaborations contribute to the IQS and USF local and global immersion in the business and nonprofit communities, thus supporting the universities' and the respective business schools' missions and values.

Innovative curricular and co-curricular activities include the use of a cross-cultural and cross-functional team-building program in the first semester as part of the student orientation in Barcelona. The program is structured as a day-long retreat which includes a series of simulations and games to stretch the students' creativity and sense of entrepreneurship in cross-cultural and gender-balanced teams. The teams practice problem-solving, effective communication, and goal achievement in a highly competitive, instructor supervised format. Similar exercises customized for different MGEM courses are facilitated and evaluated throughout the program curriculum and encouraged in the program's co-curricular activities as well.

### Program Standards

English is the language of instruction for the entire program. Students' TOEFL scores must be at a 79 minimum (Internet) or 6.0 in IELTS. There is an ongoing discussion to raise the TOEFL score level to a minimum of 89 based on program and individual course assessment results and student feedback collected via a survey conducted in July of 2015. Any changes made would be effective for the cohort that begins in the fall of 2016.

Courses are taught by leading scholars as well as accomplished practitioners, with deployment ratios of 50% for SA faculty, and 93% for SA+ PA+ SP faculty in the 2015 academic year. The ratio is projected to increase to 75% for SA faculty and 100% for SA+PA+SP+IP in the 2016 academic year. Participating faculty delivered 75% of overall instruction in the 2015 academic year and are projected to deliver 100% of overall instruction in the 2016 academic year. The MGEM program is designed for college graduates from various academic disciplines. Students are admitted with a minimum 3.0 GPA from their undergraduate institution, but there is no GMAT or GRE requirement.

Three times a year the designated MGEM faculty directors at each school meet to review curriculum, assess student success in the prior semester, and close the loop on program improvements. These meetings take place in September at IQS, in January at Fu Jen University, and in August at the University of San Francisco. Participants in these reviews include the faculty directors from IQS, Fu Jen, and USF, as well as the Dean and Provost from the respective host institution. During these review sessions, faculty and Program Directors examine the assessment of student learning outcomes (program-wide and course-specific); teaching evaluations are analyzed from the prior semester; student performance is assessed; and debriefing occurs on issues that arose during the semester. Detailed evaluations are used to make ongoing improvements in the program that students have provided for not only each course and the overall program, but also for site visits, business planning sessions, and assessment of consulting projects. Assurance of

learning processes are written into an ongoing report and given to each of the partner schools. The report includes prior actions taken, future actions to be taken, and how students are assessed regarding the attainment of program goals and learning outcomes. The five program student learning outcomes are assessed by faculty members and Program Directors using program rubrics.

Assessment and Actions Taken on the Basis of Indirect measures:

Below are summaries and representative actions taken on the basis of indirect measures of student learning to make improvements in the program in 2014 and 2015:

- Based on student surveys (with an 81% response rate), and qualitative feedback sessions conducted in July 2013, several recommendations were made to improve the program:
  - Reduce the business plan to one semester, as having a business planning process occur over the full year was deemed unwieldy and had diminishing returns for the students.
  - The two consulting courses had their formats and curriculum formalized at both IQS and USF based on student feedback indicating that the courses prepared them for interviewing and placement. This was implemented in 2014.
  - Students reported that all learning objectives were met, with the exception of the fifth learning objective: “Identify and analyze financial information to make effective managerial decisions. Based on this student feedback, a new course was introduced at IQS titled “Common Ground in Corporate Finance and Accounting.” Given that IQS starts in the fall, this course was introduced in the 2015 AY.
  - In 2014 AY, a formal warning system was introduced (e.g., if a student’s GPA falls between 2.5 and 3.0, they are warned that his or her grades must improve by the following semester, bringing the GPA up to 3.0 cumulatively, or he/she is dismissed from the program. If the GPA falls below 2.5 then the student is automatically dismissed from MGEM).
- In July 2014, a survey was conducted of all graduating students, with a 100% response rate. They were satisfied with the business plan course at Fu Jen and the two consulting courses at both IQS and USF. Learning objectives generated an average satisfaction level of 85%, with exception in the fifth objective related to financial competency (only at 59%); the new course at IQS could not be introduced until 2015 AY, but the course should address this concern. In addition:
  - There was one course that was considered redundant between IQS and Fu Jen. In 2015 AY, this overlapping course was replaced with a finance course, eliminating course redundancies.
  - The consulting course at IQS needed more structure, and IQS administration now has this course under review. Course structure and curriculum continues to be an ongoing issue that is discussed among the three schools. Given that the consulting course serves as an integrative capstone course, external evaluators will assess the progress of the MGEM students from the first fall semester to the last summer semester to evaluate progress.
  - A common GPA scaling to minimize grading differences across all schools was instituted. This was effective in the 2015 AY.
- In July 2015, a survey was conducted of all graduating students, with an 87% response rate. The students were very satisfied with the consulting projects and their learning outcomes at both IQS and USF most of the courses offered by the three universities at an average combined satisfaction level of 80.5% (those who strongly or simply agreed with a statement) with the level of achievement of program learning outcomes. A lower level of satisfaction (under 65%) was expressed with the competencies related to business plan writing,

some aspects of curriculum coverage in the area of technology and innovation, and perceptions of student financial competency.

Overall, a majority of students felt that their spring 2015 semester at the Fu Jen University could have been better organized and taught at a higher level of quality, engagement, and faculty assessment strategies. There were also some concerns that were brought to the attention of program administration regarding student support services and practices, including the need for greater coordination between the three universities, more grading and performance expectation consistency, and an even greater emphasis on entrepreneurship-related content throughout the program (MGEM currently combines elements of international business and entrepreneurship and innovation curriculum content and overall design). For a list of actions taken in response to student feedback and direct measures-based assessment, refer to the Loop-closing section below.

#### Framework of the Program Assessment Utilizing Course-based Direct Measures.

Faculty and external reviewers utilize the general framework of assessment of the MGEM program stated learning outcomes operationalized in the program rubric shown below. On the basis of the program general rubric, MGEM faculty members and program directors have developed and used a variety of course-based rubrics for principal assignments and collect and assess student performance. An example of the comprehensive rubric for assessing final presentations of the Consulting Projects—a cumulative competency development process, which students start at IQS university (first semester) and complete at USF (last semester) is included below.

The MGEM program curriculum map was thoroughly reviewed by the USF MGEM faculty on September 30, 2015 on the basis of direct and indirect measures/evidence collected from all three universities' faculty. It was revised to make clearer the connections between program goals/learning outcomes and the goals and outcomes of individual MGEM courses. Related student competencies and assignments were discussed with a special emphasis placed on the application of global management theory to practice in the Consulting Projects courses (both IQS and USF), writing and analytical skills, and financial management analytical competency and skills.

Finally, a new student curricular and co-curricular learning assessment and professional development method will be introduced as of 2016—an electronic portfolio (e-portfolio), which will serve as a repository of select student academic work and professional development documents, such as select final papers/ presentations, final exams, reflection papers, analytical work, resumes, an annotated listing of most pivotal business field and immersion trips, and professional interviews. Also, the e-portfolio will serve as a destination for student assessment data sourcing and analysis while being an easily accessible and useful organizational tool for students.

#### Assessment Conducted on the Basis of Direct Measures:

The following courses were assessed on the basis of achievement of respective course outcomes mapped onto respective program outcomes and goals using the course rubrics on the 3-point scale (1- below the standard expectations; 2- meeting the standard expectations; 3- exceeding the standard expectations) by program faculty and some peer reviewers:

**Table 1**  
*Percentages of Student Performance Levels Below/Above Expectations  
in Select MGEM Courses (Spring- Summer 2015)*

<b>Courses</b>	<b>n</b>	<b>% (≤2.0)</b>	<b>% (≥3.0)</b>
MGEM 5105 (Operations Management)	37	0	62.2
MGEM 5106 (Corporate Finance)	37	0	29.7
MGEM 5107 (Innovation Technology)	37	0	27.0

MGEM 5108 (Entry Barriers)	37	0	37.8
MGEM 5114 (Business Plan)	37	0	37.8
MGEM 5109 (Marketing)	37	0	24.3
MGEM 5110 (Global Distribution)	37	0	56.7
MGEM 5111 (Social Entrepreneurship)	37	27	8.1
MGEM 5112 (Venture Capital)	37	0	8.1
N	37	3	32.4

#### Evidence-based Loop-closing Activities (completed and work in progress)

The FJU faculty, in consultation with their counterparts at USF and IQS, is currently revising all of the courses they will be offering in spring 2016. Using both direct and indirect measures-based evidence gathered since Spring of 2015, the campus will incorporate new topics, update their selection of case studies, eliminate unnecessary gaps and overlaps with USF and IQS courses, and streamline course assignments to be more congruent with stated course learning outcomes:

- They have replaced the Business Plan course with the *Emerging Trends in Entrepreneurship*, a course which studies overarching issues of business entrepreneurship and innovation both conceptually and using a broad range of in-depth case studies of different types of entrepreneurial and innovative companies in different sectors. Additional attention will be paid to larger manufacturing, transportation and global supply chain, and technology production and distribution companies. Despite a relatively good level of student performance in this course, the two consulting project courses in the program were disconnected methodologically and in terms of assessment from the Business Plan course. The disconnect among courses confused students and lead to some inconsistencies and weaknesses in their performance in the final consulting project design, writing, and presentation. The new course will prepare students for a more in-depth examination of topics of entrepreneurship (both US-based and multinational/ global) through different functional areas of management in the USF MGEM courses.
- The *Corporate Finance* course has been redesigned to eliminate an unnecessary overlap in the areas of business accounting principles, financial derivatives, and global financial practices with the *Corporate Valuation and Accounting* course taught by IQS. Instead, the Corporate Finance course now emphasizes free cash flows, multinational companies' business valuations, and MNC capital budgeting, building upon the fundamental concepts and terminology covered in the IQS course and preparing students for specifically for the *Venture Capital*, *Corporate Entrepreneurship*, and *Micro-Financing* course taught at USF. At the same time, new standardized student assessment tools will be introduced to strengthen the students' financial analytical performance by testing their knowledge and ongoing skill development, and prepare them for an even more rigorous specialized finance training at USF.
- The *Innovation Technology Management* course (now titled *Innovation and Technology Management*) at FJU has been significantly updated with the new content more reflective of the recent developments in the global technology industry. Special attention has been paid to technology business incubation, acceleration, partnerships and joint ventures; an international division of tech labor, as well as on the impact of the tech industry on the manufacturing sector, especially in Asia. The Technology course received new and improved objectives and stated learning outcomes connected more directly with the course assignments as well as incorporating aspects of tech industry immersion by bringing guest speakers from the industry and partaking of field trips to innovative tech companies in Taiwan.
- The *Global Competitiveness and Entry Barrier* course will now further elaborate on issues of cross-border trade, marketing, and business development following the more global business

fundamentals and terminology course (*Global Environment and Business Trends*) taught at IQS, thus providing better continuity and scaffolding of student learning. In addition, an increasingly challenging learning assessment design and structure will be introduced in this course to further expand and assess student learning and strengthen “above standard” or “exceed expectations” levels of performance.

The IQS faculty finalized its revisions of the course curriculum in late August-early September of 2015 to enhance the conceptual and practical topical coverage, enrich an in-class and online discussions, establish an even more firm theoretical foundation and eliminate unjustifiable curricular gaps and overlaps, especially with the courses taught at FJU.

- The *Consulting Projects* course at IQS was thoroughly revised to obtain a better structure and clearer outcomes as reflected by its assignments, rubrics, and the overall performance criteria and expectations. There is a significantly more pronounced faculty coordinator’s involvement, and IQS administration feels very comfortable with the course’s new design and implementation. The course will now have the same degree of interaction and coordination of project activities with companies that students have in the Barcelona course.
- The *Global Environment and Trends* course was updated to incorporate more recent case studies and materials and strengthen the student performance assessment tools; student attendance, participation, and other performance standards in this very first course in the program were further articulated and enforced.
- The *Cross-Cultural Management and Ethical Business Practice* course was enhanced with standardized assessment mechanisms (final exams) designed and implemented separately for the cross-cultural conceptual analysis and business ethics components, thus providing a more solid and methodologically clear assessment system and student learning foundation. The course received an overhaul of reading materials design/ selection, including a richer and more diverse selection of case studies and learning assessment mechanisms.
- The *Common Ground in Corporate Valuation and Accounting* course was thoroughly redesigned to provide a more focused analysis and review of business finances including conceptual, terminological, and practical fundamentals. There has been an effort to study a greater selection of sectors of the economy and organizations while streamlining the course assignments while preventing a (formerly significant) overlap with the *Corporate Finance* course at FJU. Issues such as profitability analysis; returns on investment, equity, and assets; the nature and dynamics of financial markets; the capital asset pricing model, APR; and other important corporate and non-corporate financial topics are reviewed in-depth and tested by mostly standardized instruments of quizzes and exams. The newly redesigned course raises expectations and academic rigor to address the existing student under-performance in this area of program learning goals and outcomes as measured directly and indirectly.
- The *Technological Appreciation and IP Management* course received a much more pronounced business planning component (the IT topics are examined using the business model design and implementation framework, pivoting it to achieve a maximum effectiveness and efficiency for a company’s/ organization’s strategic goal achievement) and a more diversified student learning assessment structure (a combination of quizzes, exams, analytical papers, homework, and team presentations).

The USF faculty are finalizing its curriculum revision recommendations and the action plan on the basis of the summative and formative assessment activities. The faculty will analyze direct and indirect measures that focus on

student verbal and written communication and analytical (especially financial analysis) performance and use standardized testing and other learning assessment methods more frequently and consistently in all of the USF courses.

At the annual faculty meeting on 9/30/15, the faculty reached consensus to pursue the following curricular and instructional changes:

- The *U.S. Consulting Projects* course was evaluated in the summer of 2015 by a panel of judges using a recently revised standardized and expanded course assignment rubric which will be introduced during the first semester at IQS and re-tested during the final consulting projects presentation at USF during the summer of 2016. Hence, the elements of pre- and post- and test-retest evaluation methodologies will be introduced in the consulting project process throughout the program to allow faculty and program administrators of the three universities to isolate student performance areas in need of improvement during the course of the program. This should lead to a more evidence-based course and perhaps program curriculum redesign. The evaluation of the team projects (specifically its oral presentation part) will be conducted concurrently with the evaluation of individual student performances during the final presentations; the requisite correlations will be analyzed and explained using a supplemental individual performance rubric.

For the summer 2015 *U.S. Consulting Projects* course, an 80% Exceeds Expectations target was set for all learning objectives that were measured.

**Lead and Manage Diverse Individuals** – Over 80% of the students Exceeded Expectations. Target met.

**Identify Ethical & Professional Responsibilities** - 8.1% of all students exceeded expectations while 27.6% did not meet expectations. Target not met.

**Effective Communications** - 62.5% of the students Exceeded Expectations; 30.5% of the students Met Expectations; 7% of the students were Below Expectations. Target not met.

**Demonstrate and Apply Knowledge** - 41.7% of the students Exceeded Expectations; 54.2% of the students Met Expectations; 4.1% of the students fell Below Expectation. Target not met.

- The *Cross-Cultural Marketing* course will include regular pop quizzes and a final exam to test the students' conceptual understanding and appreciation for the marketing strategies, techniques, resources, and terminology. More cross-cultural marketing case studies and related content will be added and operationalized via creative assignments. Students will be held more accountable for the clarity and analytical quality of their submissions.
- The *Social Entrepreneurship* course will be replaced with *Entrepreneurship and Innovation* course more geared towards teaching the “nuts and bolts” of entrepreneurship in a wide variety of business, nonprofit, and international (NGO) organizations and their creative partnerships, especially as applicable to the examination of the Silicon Valley ecosystem. The student's low performance in this course can partially be explained by some curricular and methodological disconnect from the *Cross-Cultural Management and Ethical Business Practice* course (taught at IQS during the first semester) and the students' lack of understanding of the concept and practice of social entrepreneurship outside of their sector-specific contexts (e.g. business, nonprofit, etc.) and hence general lack of appreciation for the topics. The course revision will provide both more rigorous training in the aforementioned areas and a more contextualized and conceptually rich content coverage.

- The *Venture Capital, Corporate Entrepreneurship, and Micro-Financing* course will be redesigned to incorporate an overview and discussion of different types of venture funding beyond VC and various types of micro-financing such as: angel investments and a greater variety of crowd-funding and crowdsourcing sources, venues, and methods. More attention will be paid to assessing student homework built into the course in an incremental way and to standardized exams and quizzes to test knowledge and financial acumen.

*MGEM 5109 - Cross Cultural Marketing and Integrated Marketing Communications (IMC)*

During the summer of 2014, *MGEM 5109 - Cross Cultural Marketing and Integrated Marketing Communications (IMC)*, was taught during the first six weeks of summer session at USF. The class briefly reviewed the core concepts in marketing assuming students have had some form of marketing in their experiences. The majority of the class is based on implementing IMC concepts in a cross cultural setting. From the midterm and the final project, several students expressed frustration because they felt they were not as strong as their colleagues in the MGEM program. On the final exam, several students wrote, “it would have helped if we reviewed marketing longer at the start of class” and “I never took a marketing class and I was confused.”

As a result of the comments of the students in the summer 2014 MGEM program, the same instructor reorganized the class to include an in-depth review of basic marketing. The review encompassed using a unique approach called “The Double Donut of Marketing.” The professor of record for the class created the “The Double Donut of Marketing” with colleagues from Loyola Marymount University. Students learn marketing by using the marketing description of target market, the four P’s (Product, Price, Place, Promotion), and SELECT (Socio-cultural, Economic, Legal, Environment, Competition, Technology). The exercise and approach was incorporated throughout the semester. At the conclusion of class, no students commented on the lack of understanding but were enthusiastic about the class. Students who were not business majors or marketing majors believed they had a solid understanding of marketing concepts. In addition, the final projects presented by the MGEM students were more organized and proved they had mastered the marketing concepts.



**Master of Global Entrepreneurship and Management – Program-based Rubric**

*(revised on the basis of the three partners' program meetings on August 10, 2015, and respective faculty meetings)*

Learning Outcomes	Beginning = 1	Proficient = 2	Accomplished = 3
<i>Demonstrates the ability to lead and manage diverse individuals and groups to facilitate organizational performance and identify</i>	<ul style="list-style-type: none"> <li>Discusses the basic concepts of leadership, or how to apply them to a work setting in order to motivate others.</li> <li>Capable of motivating and leading a team to accomplish basic tasks and objectives.</li> </ul>	<ul style="list-style-type: none"> <li>Discusses proficiently the basic principles of leadership and can effectively apply them to enhance the performance of others.</li> <li>Accomplishes at least short-term team objectives by organizing/coordinating team performance.</li> </ul>	<ul style="list-style-type: none"> <li>Exemplifies clear understanding of both basic and more advanced leadership principles, and can apply them to enhance the development and performance of others and an organization/ project as a whole.</li> <li>Exhibits consistently strong organizational and leadership skills while serving on a team and leading others in multiple situations or assignments.</li> </ul>
<i>Identifies the ethical and professional responsibilities of a global entrepreneur</i>	<ul style="list-style-type: none"> <li>Recognizes in very basic terms how social and ethical issues impact organizational strategies, structures, and systems without applying these concepts to case studies.</li> </ul>	<ul style="list-style-type: none"> <li>Recognizes and identifies how social and ethical issues generally impact organizational strategies, structures, and systems that shape organization behaviors while being able to apply these concepts to a few cases.</li> </ul>	<ul style="list-style-type: none"> <li>Identifies, explains and interprets effectively how social and ethical issues impact a wide variety of organizational strategies, structures, and systems that shape organization behaviors in different settings.</li> </ul>
<i>Communicate effectively both verbally and in writing, using different media</i>	<ul style="list-style-type: none"> <li>Basic introduction with unclear explanations of key points and a basic conclusion.</li> <li>Emerging competency in moving from abstract to concrete. Applies models to real-world problems with some errors and omissions.</li> </ul>	<ul style="list-style-type: none"> <li>Opening statement (verbal and/or written) is highly relevant to topic. Gives a strong outline of the speech, which is mostly organized with some transitions, and allows enough time to deliver presentations.</li> <li>Draws clear and effective conclusions and makes effective connections verbally and in writing between applications and relevant theory.</li> </ul>	<ul style="list-style-type: none"> <li>Clear opening statement that catches the audience's interest and gives an overview while staying focused throughout. Includes transition statements that tie sections together. Very effective time management.</li> <li>Applies theory to a multiplicity of real-world situations. Accurately recognizes the relevant underlying theory when presented with concrete problems.</li> </ul>

**Levels of Proficiency (Scoring):** Not Observed = 0; Beginning (below expectations)= 1; Proficient (meets expectations) = 2; Accomplished = 3 (exceeds expectations)

The following expectations are established: (1) 80% of the students will score a 3 on a 3-point scale on the stated outcome represented by the total average score, thus exceeding standard expectations; and (2) 80% of the students will score a 3 on a 3-point scale on each of the defined performance dimensions.

<i>Demonstrate and apply knowledge from a global perspective by integrating relevant cultural, economic, political, historical, geographic, and environmental factors in business decisions</i>	<ul style="list-style-type: none"> <li>Analyzes the basics of cultural dimensions and how they can be applied to specific global business situations. Clearly identifies and defines issues/challenges in social, ethical, and multicultural contexts.</li> <li>Reviews the basic impact of globalization and identifies the implications for each functional area.</li> </ul>	<ul style="list-style-type: none"> <li>Discusses extensively cultural dimensions and identifies some specific behaviors to global business situations.</li> <li>Reviews and frames issues in appropriate global contexts and shows competency toward their solutions.</li> <li>Accurately synthesizes the impact of globalization in all the functional areas with basic analysis of cross-functional issues.</li> </ul>	<ul style="list-style-type: none"> <li>Analyzes proficiently various cultural dimensions and is able to apply specific behaviors to international business situations. Displays expertise and competence of contexts through analyses of global business cases.</li> <li>Analyzes the impact of globalization on each area of management and factors and comprehensively yet succinctly presents the cross-functional issues as those relate to globalization.</li> </ul>
<i>Identify and analyze financial information to make effective managerial decision.</i>	<ul style="list-style-type: none"> <li>Results of analysis demonstrate basic understanding of a tool and/or framework for solving the problem.</li> <li>Adequately describes and differentiates the informational needs of different business lines.</li> </ul>	<ul style="list-style-type: none"> <li>Proficient analysis performed, with basic conclusions and recommendations.</li> <li>Overall proficiently describes and differentiates the informational needs of different and business lines, and provides an understanding of the means for producing financial information.</li> </ul>	<ul style="list-style-type: none"> <li>Conclusions and recommendations demonstrate an excellent ability to synthesize a diverse set of results into a coherent and complete solution to the problem.</li> <li>Demonstrates a thorough understanding of and is able to process the financial information and outputs needed by various organizations using appropriate documentation and practices.</li> </ul>

**Levels of Proficiency (Scoring):** Not Observed = 0; Beginning (below expectations)= 1; Proficient (meets expectations) = 2; Accomplished = 3 (exceeds expectations)

The following expectations are established: (1) 80% of the students will score a 3 on a 3-point scale on the stated outcome represented by the total average score, thus exceeding standard expectations; and (2) 80% of the students will score a 3 on a 3-point scale on each of the defined performance dimensions.

### Global Business Practicum Presentation Rubric

	Exceeds Expectations	Meets Expectations	Below Expectations
Oral Skills	Coherence of presentation strongly supported by correct pronunciation, confident enunciation and articulation. Pauses are purposeful and enhance fluency of speech. Virtually no vocalized fillers are noticeable. Effective organization well suited to purpose. Main points are clearly distinct from supporting details. Graceful transitions create coherent progress toward conclusion.	Careful pronunciation supports coherence of presentation. Enunciation and articulation of words are mostly clear. Pauses were momentary and did not interrupt fluency of speech. Vocalized fillers are minimal and do not distract the audience. Clear organizational pattern. Main points are distinct from supporting details. Smooth transitions differentiate key points.	Pronunciation is mostly correct yet enunciation and articulation are still tentative. Speaker recovers from awkward pauses and proceeds. Vocalized fillers are noticeable but not excessive. General structure/organization seems adequate. Difference between main points and supporting details is blurred. Logical flow, but no clear signposts for transitions.
Analyze & Frame Problems	The team has evaluated and used the correct methodology to analyze quantitative data, determining any needs for additional or different data. Where analyses are incorrect or inadequate, the team has identified the inadequacies and made or suggested appropriate corrections to improve the validity of decisions. The report is ready for professional presentation.	The team has evaluated the extent of the correct methodology needed to analyze quantitative data, determining any needs for additional or different data. Where analyses are incorrect or inadequate, the team has identified the inadequacies and attempted to resolve them. Additional analyses are needed prior to presentation to the company.	The team has evaluated the correct methodology to analyze quantitative data. Problems in methodology were identified correctly, but the corrections suggested were neither correct nor attempted. Significant work on the report is still needed.
Operate in the ever-changing global marketplace.	Shows deep understanding of key firm level issues and practices in managing global firms or conducting international business, shows an ability to conduct sophisticated analyses of global business operations and offer recommendations to help companies capture new business opportunities and improve their competitiveness.	Is able to identify and analyze key firm level issues and practices of managing global companies and international businesses (e.g. pros, cons, and conditions of various international business practices).	Is able to identify and have a basic understanding of key firm level issues affecting the global firm and international business.
Formulate well thought-out strategic plans and vision for future business decisions.	Shows forethought and analysis across all key areas of plan.	Shows some forethought and analysis in plan, but misses a few key areas.	Does not show any forethought or analysis in plan,
Synthesize ideas from various business areas into a cohesive, creative plan or vision.	The team seamlessly integrates concepts together, presents ideas in a clear, cohesive, and creative manner.	The team adequately integrates concepts from different disciplines into business plan, though audience is still left with unanswered questions.	The team fails to clearly and coherently integrate different business areas into a plan.

## SOM, MGEM - MGEM Curriculum Map

Legend: (1) - Introduced. (2) - Moderate Coverage. (3) - Comprehensive Coverage

Learning Outcomes	MGEM 5101 Global Environment & Business Trends	MGEM 5102 Technology Appreciation & Intellectual Property	MGEM 5103 Innovative Product Development, Demand Assessment	MGEM 5104 Cross-Cultural Mgt and Ethical Bus. Practice	MGEM 5105 Operations Mgt, Supply Chain Mgt	MGEM 5106 Corp. Finance - Global Perspective	MGEM 5107 Core Competency Based HR	MGEM 5108 Global Competitiveness	MGEM 5109 Cross Cultural Mkt	MGEM 5110 Global Distribution	MGEM 5111 Leadership	MGEM 5112 Venture Capital	MGEM 5113 Consulting Projects	MGEM 5114 Business Plan	MGEM 5115 Consulting Course
01) Lead and Manage Diverse Individuals	2			2	2	2		2	2	2	2	2	3	3	3
02) Identify the Ethical and Professional Responsibilities	3	1		3			2		2	2	2	2	3	3	3
03) Effective Communication		2		2	2	2	2	2	2	2	2	2	3	3	3
04) Demonstrate and Apply Knowledge	3	1	2	3	2		2		2	2	2	2	3	3	3
05) Identify and Analyze Financial Information			2			2		1				3	2	3	2

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**APPENDIX 23**  
**School of Management Undergraduate Professional  
Development**

Date	Event	Description
Ongoing	Linked-In workshops, resume review, mock interviews.	USF Career Services provides multiple opportunities to develop job-seeking skills. Also, holds Fall Career Fair.
9/2/14	Preparing for USF's Fall Meet The Firms	Accounting Society meeting to provide professional polish and information for the Meet the Firms event. Co-sponsored with Accounting department and USFCareer Services.
9/11/14	Meet The Firms	Networking event with accounting and finance firms put on by Beta Alpha Psi.
9/17/14	Bloomberg Day	All-day session with Bloomberg representatives to learn about Bloomberg resources and to take the Bloomberg Aptitude Test (BAT).
10/6/14	Powering Today's Business Through Data Visualization	Speaker event. Professional development opportunity for students to get an introduction to Tableau software with in-depth demonstration. Collaboration with BAIS department.
11/6/14	Accounting Society Meeting	Professional development opportunity for Accounting majors. Co-sponsored with Accounting department.
1/29/15	Accounting Society Meeting	Professional development opportunity for Accounting majors. Co-sponsored with Accounting department.
2/26 & 3/3/2015	McLaren Scholars Information Session	Presentation to recruit for SOM honors program.
3/3/15	Accounting Society Meeting	Professional development opportunity for Accounting majors. Co-sponsored with Accounting department.
3/10/15	Welcome to the Big Leagues with Carmine Del Sordi	Speaker event with USF alum/author about what it takes to succeed in the business world. Co-sponsored with Alumni & External Relations department.
4/21/15	Accounting Society Meeting	Professional development opportunity for Accounting majors. Co-sponsored with Accounting department.
4/22/15	Understanding How Big Data Powers Big Business with Bill Shmarzo	Speaker event co-sponsored with BAIS department.
4/23/15	Entrepreneurship and Innovation Open House	Co-sponsored with E&I department to showcase New Venture Center and USF alumni entrepreneurs.
5/22/15	McLaren Scholars Graduation Reception	Cords ceremony for McLaren Scholars (honors program students) graduating in May and December 2015.

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**APPENDIX 24**  
**Graduate Program Committee and Undergraduate Program  
Committee By-Laws**



**Graduate Program Committee and  
Undergraduate Program Committee  
By-laws**

**I. Nature and names**

1. The units shall be referred to as “Graduate Program Committee” and “Undergraduate Program Committee.”
2. Both the Graduate Program Committee and the Undergraduate Program Committee are joint curriculum committees and shall be composed of representatives of the Association and the school/college administration (Article 21.3). Dean-appointed non-faculty members are “ex officio”—that is, by “right of office”—but are not voting members.

**II. Objectives and functions**

1. Evaluate and approve new program core offerings, majors, areas of specialization/emphasis, and program-related proposals submitted by the faculty, the academic departments or by the Dean.
2. Approve significant changes to existing undergraduate and graduate core courses; and delete undergraduate and graduate core courses as necessary.
3. Review new academic department-approved undergraduate and graduate elective offerings.
4. Receive written notification by department chairs or program directors of any changes to majors, emphases, areas of specializations or catalog descriptions of undergraduate or graduate courses and ensure appropriate circulation of said notification to staff, faculty and Associate Deans.
5. Settle course offering disputes between academic departments if not first resolved by respective departments.
6. Develop documentation and procedures for modifications and proposals concerning new courses, majors, areas of specialization, and programs.
7. Review, when necessary, academic assessment processes and procedures as required by the CBA (Article 20) and performed by the academic departments within the SOM.
8. Encourage and promote creativity, innovation, ethics, and rigor in the undergraduate and graduate curricula.
9. Perform all other curriculum and program—related functions as necessary under these By-laws, the University and SOM mission statements, and the CBA.

**III. Elections, membership, meetings, etc.**

1. Composition: The faculty-elected co-chair, the Dean-appointed co-chair, academic department faculty representatives, Dean-appointed faculty representatives. The co-chairs and all faculty members are voting members. There can be no more than four (4) other non-voting, non-faculty members to each committee. A student representative as designated by the Graduate Business Association is an ex-officio, non-voting member to the Graduate Program Committee.
2. Elections: The faculty co-chair for each program committees shall be elected at large, as needed, by May 1 and be expected to serve a three-year term.
3. Voting full-time faculty: Each academic department shall nominate one full-time faculty member to each program committee by May 1 to serve a three-year term. As joint University/Faculty Association committees, the Dean can appoint representatives in equal proportion to the number of Association representatives. In practice, the Dean will normally appoint up to four additional faculty members to each program committee.
4. A quorum shall consist of a majority of voting members at each of the program committees. Motions shall require a majority vote for passage.
5. The program committees shall coordinate the activities within their purview with other standing committees and faculty groupings.



6. The Faculty Governance Council shall make the necessary preparations for standing committee co-chairs to be elected by the end of the Spring semester each year, as needed.
7. The Program Committees may commission task forces, special committees, or other such groups to review and make non-binding recommendations to the Dean or other faculty groups concerning any temporary issues within the School that fall within the general purview of being curriculum related.
8. Meetings shall be open to all SOM faculty members. Program committees at the discretion of their program committee co-chairs may invite visitors. However, voting privileges shall be reserved for the co-chairs and faculty committee members.
9. The program committees shall be in 'executive session'—that is, consisting of only the co-chairs and the faculty members—when issues of full-time faculty performance are brought before the program committees for discussion.
10. The agenda, and necessary documentation for the meeting, shall be prepared by the program committee's co-chairs and be distributed in a timely fashion.

#### IV. Parliamentary Authority

Robert's Rules of Order, latest edition, shall be normative but not binding at meetings of the School membership, the Faculty Governance Council, and committees unless two or more members request strict adherence for a given agenda item.

#### V. Subordination

No part of these program committees' By-laws, objectives, or proceedings shall stand in contradiction to the Collective Bargaining Agreement.

#### VII. Adoption, Implementation and Amendments

These By-laws shall be deemed adopted, implemented and/or amended upon a majority vote by the SOM Faculty Governance Council, and approval by the Dean.

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**Collective Bargaining Agreement:** <http://www.usffa.net/legal/collective-bargaining-agreement>

**APPENDIX 25**  
**Strategic Framework for May 2013**

The School of Management will contribute to the lives of the students, faculty, staff, and community as a premier Jesuit teaching, research and service institution offering management education drawing on a distinctive regional network and global connections.

The School of Management at the University of San Francisco is a catalyst for change in business, government and non-profit managerial practices. Through research and teaching that draws on the global diversity and entrepreneurial energy of our region, we educate students to build more productive and compassionate organizations. We value human dignity and integrity, open and disciplined inquiry, and a collaborative and enterprising spirit that combine to facilitate significant contributions by our graduates, students, faculty, and staff.

**Core Strategic Levers**, Small  
School Advantage Sector  
Emphasis  
San Francisco Location Social  
Justice Orientation

**Strategic Priorities**

**Education Programs and Scholarship:**

1. Ensure high-quality curriculum with a culture of high expectations for students, faculty and staff across all programs, supporting social justice and mission-related academic and community impact. (*Small School Advantage; Social Justice Orientation; San Francisco Location*).
2. Create a vibrant research and consultant culture that promotes excellence and innovation in research and professional engagements across the private, public and nonprofit sectors, with an emphasis on innovation (*Sector Advantage*).

**People and Internal Operations Processes:**

3. Foster diverse and inclusive interactions for faculty, staff and students that encourages high performance, teamwork, respect, and accountability across main campus, downtown, and regions. (*Social Justice Orientation*).

**External Relations:**

4. Generate and nurture mutually beneficial relationships with organizations, professional associations, and individuals that secure access and resources that support the lifelong learning and professional development of our students and alumni across all programs. (*San Francisco Advantage; Small School Advantage; Sector Emphasis; Social Justice Orientation*).

**Strategic Planning Committee, School of Management:**

Margot Frey, Kelly Sugrue, Nicole Nguyen, Barry Doyle, Jennifer Parlamis, Mouwafac Sidaoui, Catherine Horiuchi, co-chair and Rich Callahan, co-chair

### Education Programs and Scholarship:

1. Ensure high-quality curriculum with a culture of high expectations for students, faculty and staff across all programs, supporting social justice and mission-related academic and community impact. (*Small School Advantage; Social Justice Orientation; San Francisco Location*).

Goals	Examples of what success can look like...
Review of course syllabi for each degree program by external faculty	Three degree courses each year
Develop exit survey, debriefing, or focus groups for students and faculty for final course in program or majors	Complete a survey for all degree programs; faculty regarded as excellent; curriculum applicability to work regarded as excellent by 80%
Revamp undergrad programs within the next 2 years to reflect market needs	
A central electronic depository of exemplar student and group projects, available to faculty, also prospective students, SOM Marketing, Alumni, and Recruitment staff	Each semester faculty to submit three exemplar student or group projects - indexed and with a table of contents developed within a month of the completion of each semester
Graduate scholarship funding is available annually across all graduate programs in a percentage proportional to revenue generated	Fair and proportional allocation by degree programs
Comprehensive preparation program for international admitted students during the summer prior to beginning their first year in the program	
An overseas immersion course (AGI) prior to graduation	
Internship, professional capstone, or service-learning requirement for graduation	
Annual report produced by SOM faculty on the impact of teaching, research, consulting, and service on advancing university mission of "Change the World From Here" and Ignatian teaching values	

2. Create a vibrant research and consulting culture that promotes excellence and innovation in research across the private, public and nonprofit sectors, with an emphasis on innovation (*Sector Advantage*).

Goals	Success looks like ...
Increased output of scholarly publications, especially applied research	15% increase in total publication output
Support reputation building activities: rankings, research dissemination, and partnerships/sponsorships	Pacific Rim Institute for Entrepreneurship and Innovation as an <i>entrepot</i>
Higher enrollments in SoM programs	50% increase within 3 years
Full time faculty member present academic research or consulting projects, with the presentation incorporated into syllabi where relevant; similar encouragement in capstone projects	At least one peer reviewed conference annually; Significant consulting projects, applied back to curriculum as relevant
Counts of faculty contributions to highly ranked journals, presentations in prestigious meetings, op editorials, radio/television. Counts of courses revised, currency of texts and articles	Counts in prestige settings rise

#### People and Internal Operations:

3. Foster diverse and inclusive interactions for faculty, staff and students that encourages high performance, teamwork, respect, and accountability across main campus, downtown, and regions. (*Social Justice Orientation*).

Goals	Success Looks Like...
Increased integration of PT and FT faculty	Onboard orientation session for all PT faculty; including mentoring, review of PT faculty support services on main campus and in regions
Increased transparency and participation in decision making, job placement, roles, and responsibilities	Increased coordination and communication between Dean, Associate Deans, Program Directors and Department chairs on faculty assignments
Key points (pillars) of strategic vision well-known	At least 80% of faculty and staff can name strategic differentiators, priorities; At least 80% of staff and faculty can state connection of their key individual efforts to strategic goals
Organizational units, i.e. departments, are clearly defined, including clear description of function	Clear administrative descriptions for Department chairs and program directors. Organizational structure known to at least 80% of faculty & staff
SOM intranet posts policies, in alphabetic order. All policies include file dates and offices/individuals for questions	Post 5 policies per month until complete; Known to at least 80% of faculty and staff

#### External Relations:

4. Generate and nurture mutually beneficial relationships with organizations, professional associations, and individuals that secure access and resources that support the lifelong learning and professional development of our students and alumni across all programs. (*San Francisco Advantage; Small School Advantage; Sector Emphasis; Social Justice Orientation*)

Goals	Success Looks Like...
Job placement report of placements within 6 months of graduate and increase Job Placement for Graduate and Undergraduate Students	Internship placement report for each summer; FT placement report on 6 months from graduation; 70% placement of grads and undergrads within 3 years
SOM identified by external audiences as providing students with usable knowledge and practical experience in internships	Internship or capstone project placement for %(UG) and % (G).
Develop 20 company/nonprofit partnerships with School of Management within 3 years	Increased job recruitment activities from companies with USF alumni by 100% in 3 years
Internships from companies with USF alumni: U.S. and abroad	200 positions within 2 years
Dons mentoring program (at least 500 active alumni)	Formalized engagement with 25% of SoM alumni; Up-to-date data for all alumni within 3 years
Program Directors and Department Chairs to actively engage with alumni at both undergraduate and graduate levels	
Better reputation of programs as defined by rankings	Raise standards for admission within the next 2 years for test scores & GPA; MBA ranked in top 100; PT MBA ranked in top 75; EMBA ranked in top 100; MPA ranked in top 100; Undergraduate ranked in top 75; Other graduate programs take a lead in Bay area and globally
3 - 5 pillars (differentiators) for the School, based on the University's 3 brand attributes	Strategic differentiators incorporated into graduate admissions marketing; Extensive launch in August
Develop a central depository of faculty research conference presentations that available to prospective student, SOM Marketing, Alumni, and Recruitment staff, and to other faculty	Indexed and with a table of contents developed within a month of the completion of each semester

## **APPENDIX 26**

### **Faculty Development Committee By-Laws**

## Faculty Development Committee By-laws

### I. Nature and names

1. The unit shall be referred to as “Faculty Development Committee” (FDC).
2. The FDC is a joint committee of the University of San Francisco Faculty Association and the University of San Francisco, whose nature and functioning is described in the CBA (Article 34.2): “A Joint college, school, or library committee shall be appointed for the purpose of distributing FDF/LDF. The Dean and the Association member may each appoint up to five individuals to serve a three-year term. Awards shall be decided by mutual agreement between parties, and not by a simple majority vote.”
3. For the purposes of this committee, the “Association Member” in Article 34.2 is defined by the SOM Faculty Governance Council.

### II. Objectives

1. The purpose of the Faculty Development Committee (FDC) is to assist in the professional and academic development, of individual faculty members and to enhance the collective scholarly reputation and stature of the faculty (CBA Article 34.5).
2. The FDC will allocate University Faculty Development Funds (FDF) pursuant the following criteria listed in order of priority (Article 34.5):
  - a. For research endeavors which may support a candidate’s request for consideration for promotion or tenure;
  - b. To faculty who wish to enhance professional effectiveness as defined in the CBA. Awards shall be based on academic merits alone. Ordinarily, preference for FDF in each college for this criterion shall be junior faculty.
3. Upon request by the Dean, the FDC will advise the Dean on the allocation of funds from sources other than the University FDF.

To accomplish the above responsibilities, the FDC will:

1. Collaborate with the Dean through regular interactions and meetings in the work of the committee.
2. Ensure that association members make a formal application to the FDC for all Faculty Development Funds as stated in Article 34.3.
3. Establish clear policies and procedures to facilitate the responsibilities cited above.
4. Clearly communicate policies, procedures, expectations, and funding decisions to all eligible faculty members.
5. Create programs—within the policy framework determined jointly with the Dean—to assist in the professional and academic development of faculty.

### III. Elections, membership, meetings, etc.

1. Composition as stated in 1.2 above.
2. Committee co-chairs: The faculty co-chair of the FDC shall be elected at large, as needed, during the spring term and be expected to serve a three-year term. The Dean will appoint a co-chair.
3. Membership: SOM faculty members recommended by the Dean upon consent by the faculty member and the SOM faculty members recommended by the SOM Faculty Governance Council upon consent by the faculty member.
4. Decisions are made by mutual agreement between the Association and the Administration

representatives, as noted in 1.2 above.

5. The terms of FDC members begin on May 1.
6. The FDC will coordinate the activities within their purview with other standing committees, faculty groupings, and department chairs.
7. The Faculty Governance Council shall make the necessary preparations for the FDC co- chair to be elected by the end of the spring semester each year, as needed.
8. The FDC may commission task forces, special committees, or other such groups to review and make non-binding recommendations to the Dean, other faculty groups, or department chairs concerning any temporary issues within the School that, while they may fall within the purview of these entities, may affect faculty development efforts.
9. Visitors may be invited to a committee meeting at the discretion of the FDC co-chairs.
10. The agenda, and necessary documentation for the meeting, shall be prepared by the FDC co-chairs and be distributed in a timely fashion.

#### IV. Parliamentary Authority

Robert's Rules of Order, latest edition, shall be normative but not binding at meetings of the School membership, the Faculty Governance Council, and committees unless two or more members request strict adherence for a given agenda item.

#### V. Subordination

No part of the FDC By-laws, objectives, or proceedings shall stand in contradiction to the Collective Bargaining Agreement.

#### VI. Adoption, Implementation and Amendments

These By-laws shall be deemed adopted, implemented and/or amended upon a majority vote by the SOM Faculty Governance Council, and approval by the Dean.

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**Collective Bargaining Agreement:** <http://www.usffa.net/legal/collective-bargaining-agreement>



**APPENDIX 27**

**Peer Review Committee By-Laws**



## Peer Review Committee By-laws

### I. Nature and names

1. The unit shall be referred to as “Peer Review Committee” (PRC).
2. The PRC is a committee of tenured faculty only. It is normally composed of five full-time tenured faculty members, including the chair. As per the Collective Bargaining Agreement (CBA), up to two of the five members of the PRC can be tenured, associate professors.

### II. Objectives and functions

1. The objective of the PRC is to provide advisory recommendations to the administration concerning the merits of each applicant for promotion and tenure.
2. Peer review committees are mandated by the CBA (Article 17.8.1), one at the unit level (“College” in the CBA, SOM in our case), and another at the University-wide level.
3. The Peer Review Committee shall adhere to the procedures, standards and timelines outlined in the CBA (Article 17, “Faculty Appointments, Promotions, and Tenure”).

### III. Elections, membership, meetings, etc.

1. The PRC shall be composed of “at least three (3) distinguished full professors (tenured) and no more than two (2) associate professors (tenured). The committee shall be composed of five (5) individuals elected by all full time bargaining unit faculty consistent with College procedures and the provisions of Article 18” (Article 17.8.1).
2. PRC members shall be elected “at large” by a majority of all full-time faculty votes following a ballot that is secret and in writing.
3. The PRC Chair shall be elected from within the committee membership.
4. The PRC shall coordinate the activities within their purview with other standing committees and faculty groupings.
5. The Faculty Governance Council shall make the necessary preparations for filling PRC vacancies by May 1 each year, as needed.
6. The PRC may commission task forces, special committees, or other such groups to review and make non-binding recommendations to the Dean, or other faculty groups concerning any temporary issues within the School that, while outside the purview of the PRC, may affect faculty in their tenure and promotion efforts.
7. The agenda, and necessary documentation for the meeting, shall be prepared by the PRC Chair and be distributed in a timely fashion.

### V. Parliamentary Authority

Robert's Rules of Order, latest edition, shall be normative but not binding at meetings of the School membership, the Faculty Governance Council, and committees unless two or more members request strict adherence for a given agenda item

### Subordination

No part of the Peer Review Committee By-laws, objectives or proceedings shall stand in contradiction to the Collective Bargaining Agreement.

### VI. Adoption, Implementation and Amendments

These By-laws shall be deemed adopted, implemented and/or amended upon a majority vote by the SOM Faculty Governance Council, and approval by the Dean.

**Collective Bargaining Agreement:** <http://www.usffa.net/legal/collective-bargaining-agreement>