UNIVERSITY OF MIAMI
FACULTY SENATE

The John Knoblock
Faculty Senate Office

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MEMORANDUM

To: Julio Frenk, President

From: Linda L. Neider
Chair, Faculty Senate

Date: March 1, 2021

Subject: Faculty Senate Legislation #2020-64(B) – Establish a Bachelor of Business Administration (BBA) in Supply Chain Analytics, Department of Management, Herbert Business School.

****

The Faculty Senate, at its February 24, 2021 meeting, had no objections to the approval to establish a Bachelor of Business Administration (BBA) in Supply Chain Analytics in the Department of Management in the Herbert Business School. This program integrates supply chain management with data analytics to enhance the career path for students.

This legislation is now forwarded to you for your action.

LLN/va/rh

Enclosure

cc: Jeffrey Duerk, Executive Vice President and Provost
John Quelch, Dean, Herbert Business School
Hari Natarajan, Associate Professor, Herbert Business School
Zahra Azadi, Assistant Professor of Professional Practice, Herbert Business School
Priscilla Rivera, Director, Programs, Herbert Business School
Patty Murphy, Associate Provost for University Accreditation, Office of Assessment and Accreditation

C**APSULE:** Faculty Senate Legislation #2020-64(B) – Establish a Bachelor of Business Administration (BBA) in Supply Chain Analytics, Department of Management, Herbert Business School.

APPROVED: _____ DATE: 4/16/21
(President's Signature)

OFFICE OR INDIVIDUAL TO IMPLEMENT: John Quelch, Dean, Herbert Business School

EFFECTIVE DATE OF LEGISLATION: IMMEDIATELY
(Pending any further Board of Trustees approval)

NOT APPROVED AND REFERRED TO: _____

REMARKS (IF NOT APPROVED):_____

NEW: B.B.A. IN SUPPLY CHAIN ANALYTICS

In Workflow

1. PG University Accreditation (pxm491@miami.edu)
2. PG FS Office for UCC (rhardeman@miami.edu; yvaldes1@miami.edu; leslie.leonard@miami.edu)
3. PG University Curriculum Committee (dchin@miami.edu)
4. PG FS Office for GWC (rhardeman@miami.edu; yvaldes1@miami.edu; leslie.leonard@miami.edu)
5. PG FS GWC (rhardeman@miami.edu; yvaldes1@miami.edu; leslie.leonard@miami.edu)
6. PG Faculty Senate (rhardeman@miami.edu; yvaldes1@miami.edu; leslie.leonard@miami.edu)
7. PG FS for President (rhardeman@miami.edu; yvaldes1@miami.edu; leslie.leonard@miami.edu)
8. PG FS President Approved (rhardeman@miami.edu; yvaldes1@miami.edu; leslie.leonard@miami.edu)
9. PG Registrar (j.zwanziger@miami.edu)

Approval Path

1. Fri, 15 Jan 2021 20:23:04 GMT
   Patty Murphy (pxm491): Approved for PG University Accreditation

New Program Proposal

Date Submitted: Mon, 23 Nov 2020 15:12:15 GMT

Viewing: B.B.A. in Supply Chain Analytics : NEW

Last edit: Fri, 15 Jan 2021 20:22:06 GMT

Changes proposed by: Priscilla Rivera (privera)

Date Entered in CaneLink

Date Entered in CaneLink

Please list the authors of this proposal including name, rank/title, program/department, and school.

Proposer(s) Name

Dr. Zahra Azadi
Assistant Professor of Professional Practice
Department of Management
Miami Herbert Business School
zazadi@bus.miami.edu
305-284-3539

Priscilla M. Rivera
Director, Programs
Undergraduate Business Education
Miami Herbert Business School
privera@miami.edu

Career

Undergraduate

Academic Structure

School/ College	Department
Miami Herbert Business School	Management

Plan Type

Major and/or Degree

Who can take this program?

Any Students in this College/School

Degree Type

Bachelor's

Degree Name

Bachelor of Business Administration

2 NEW: B.B.A. in Supply Chain Analytics

Proposed Plan Code
SCANL_BBA

Plan Name
B.B.A. in Supply Chain Analytics

Will there be any subcomponents within the program such as concentrations, specializations, thesis/non-thesis options, or tracks?
No

Effective Term
Fall 2021

First Term Valid
Fall 2021

Program Instruction Mode
In Person

Where is the program offered?

Location	Please provide the % of instruction at each location.
Coral Gables Campus	100

Program Length (Years)
4

Total Credits
120

Areas of Knowledge
STEM

To Be Published in the Academic Bulletin

Program Overview

Overview

Major Area of Specialization in Supply Chain Analytics (STEM)

The Department of Management offers a major area of specialization in Supply Chain Analytics for students pursuing the Bachelor of Business Administration degree.

The undergraduate major in Supply Chain Analytics is designed to give students an understanding of the modern supply chains and the decision tradeoffs, skills necessary to model supply chain problems as well as source and analyze supply chain data to create efficiency in the firms. Students who pursue the major in Supply Chain Analytics will be exposed to an understanding of predictive and prescriptive analytics to become a problem-solver in the complex supply chain systems; coursework that helps to broaden their understanding of how to help organizations to identify value-enhancing efficiencies; and hands-on experiences that explore actually analyzing modern real-world supply chains.

Program Mission Statement

Mission

- To develop innovative ideas and principled leaders that transform global business and society.

Program Goals

Goals

Students pursuing the Bachelor of Business Administration (BBA) degree with a major area of specialization in Supply Chain Analytics are trained to become data-driven decision-makers to help companies to understand trade-offs within their supply chain, and to improve decision-making in increasingly complex and interconnected operations and supply chains.

Student Learning Outcomes

Student Learning Outcomes

BBA graduates will be critical thinkers who:

- Demonstrate an understanding of operations and supply chain theories and their applications
- Demonstrate skill sets necessary to source and apply supply chain data, as well as interpret and communicate the results.
- Demonstrate skill sets necessary to model decision problems of a firm's supply chain.
- Demonstrate skill sets necessary to understand pressing challenges related to operations and/or supply chain and effectively resolve them.

Curriculum Requirements

Curriculum Requirements

In addition to satisfying the University General Education Requirements and Electives, students pursuing the BBA in Supply Chain Analytics must complete the BBA Business Core and the specific coursework for the Supply Chain Analytics major area of specialization as follows:

Code	Title	Credit Hours
University General Education Requirements [1, 2]		
ENG 105	English Composition I	3
ENG 106	English Composition II [3]	3
UMX 100	The University of Miami Experience	0
Arts and Humanities Cognate Courses		9
People and Society Cognate Courses		9
Electives		**20**
BBA Business Core Requirements [1]		
ACC 211	Principles of Financial Accounting	3
ACC 212	Managerial Accounting	3
BSL 212	Introduction to Business Law	3
BTE 210	Fundamentals of Business Technology and Innovation	3
BUS 150	Business Analytics	3
BUS 300	Critical Thinking and Persuasion for Business [3]	3
ECO 211	Principles of Microeconomics (Microeconomics)	3
ECO 212	Principles of Macroeconomics (Macroeconomics)	3
FIN 302	Fundamentals of Finance	3
MAS 201	Introduction to Business Statistics [4]	3
MAS 202	Intermediate Business Statistics [4]	3
MGT 100	Managing for Success in the Global Environment	3
MGT 303	Operations Management	3
MGT 304	Organizational Behavior	3
MGT 401	Strategic Management (taken in the final semester)	3
MKT 201	Foundations of Marketing	3
or MKT 301	Marketing Foundations	
MTH 161	Calculus I (or equivalent) [4]	4
Major Area of Specialization in Supply Chain Analytics [4, 5, 6]		
MGT 303	Operations Management (Taken as part of the Business Core)	
MAS 332	Data Acquisition, Preparation and Visualization	3
MAS 342	Introduction to Optimization and Decision Making	3
MAS 432	Data Analysis	3
MGT 445	Supply Chain Modeling and Analysis	3
MGT 446	Supply Chain Strategy	3
MGT 448	Global Sourcing	3
MGT 451	Supply Chain Analytics Practicum	3
Quantitative Choice Course - Select one course (3 credit hours) from the following: [6]		3
BTE 320	Introduction to Programming	
BTE 423	Database Management Systems	
IEN 465	Production and Inventory Control	
IEN 568	Materials Handling and Facilities Planning	
MAS 548	Data Mining and Knowledge Acquisition	
MAS 549	Big Data Analytics	
MKT 302	Marketing Research and Market Analysis	

MKT 369	Marketing Analytics	
Total Credit Hours		120

1 **NOTE**: ENG 105 and ENG 106 , or their equivalents, must be completed prior to attaining junior year classification, per the University General Education Requirements. Additionally, all 100 and 200-level Business Core courses must be completed by the end of the fifth semester of college work or during the semester in which the student is completing 75 credit hours.

2 At least one course with an international focus must be completed within the degree requirements. The appropriateness of the course is determined by the academic advisor.

3 Students who do not earn at least a C- in ENG 106 must either repeat ENG 106 and earn at least a C- or complete ENG 230 with at least a C- before enrolling in BUS 300.

4 In order to declare the Supply Chain Analytics major, a BBA student needs to have earned a minimum 3.6 average for MTH 161, MAS 201, and MAS 202.

5 All specific coursework for the major area of specialization in Supply Chain Analytics must be completed with a grade of "C" or higher. A minimum cumulative GPA of 2.5 is required for all specific coursework taken in the major area of specialization. All courses must be taken within the current pre-requisite structure.

6 No course may double count in any other major, minor, or cognate.

Plan of Study

Sample Plan of Study

This Sample Plan of Study represents one possible version of a new freshman Business student's 8-semester plan. The individual student's plan may vary depending upon the initial placement into English Composition and mathematics. Moreover, numerous plan variations are possible if a student enters the University with advanced college credits, wishes to participate in study abroad, chooses a special program option, or selects additional majors or minors.

Note that each major/minor at the University of Miami satisfies a particular "Area of Knowledge" within the general education requirements of the University. This means that it is possible to pursue two majors or a major and a minor within the Miami Herbert Business School and fulfill both the STEM and People and Society Areas of Knowledge; a separate cognate in these areas would not be required. The only remaining general education Area of Knowledge would be Arts and Humanities, which must be completed through a major, minor, or cognate outside of the Business School.

Students construct their individualized plans in collaboration with their assigned academic advisor.

Freshman Year		
Fall		**Credit Hours**
ECO 211	Principles of Microeconomics	3
ENG 105	English Composition I	3
MGT 100	Managing for Success in the Global Environment	3
MKT 201	Foundations of Marketing	3
MTH 161	Calculus I	4
UMX 100	The University of Miami Experience	0
	Credit Hours	16
Spring		
BSL 212	Introduction to Business Law	3
BUS 150	Business Analytics	3
ECO 212	Principles of Macroeconomics	3
ENG 106	English Composition II	3
MAS 201	Introduction to Business Statistics	3
	Credit Hours	15
Sophomore Year		
Fall		
ACC 211	Principles of Financial Accounting	3
BTE 210	Fundamentals of Business Technology and Innovation	3
MAS 202	Intermediate Business Statistics	3
MGT 303	Operations Management	3
Arts and Humanities Cognate Course		3
	Credit Hours	15
Spring		
ACC 212	Managerial Accounting	3
BUS 300	Critical Thinking and Persuasion for Business	3
FIN 302	Fundamentals of Finance	3
MAS 432	Data Analysis	3

Art and Humanities Cognate Course		3
	Credit Hours	15
Junior Year		
Fall		
MAS 332	Data Acquisition, Preparation and Visualization	3
MGT 304	Organizational Behavior	3
MGT 445	Supply Chain Modeling and Analysis	3
Arts and Humanities Cognate Course		3
Elective		3
	Credit Hours	15
Spring		
MGT 446	Supply Chain Strategy	3
Quantitative Choice Course		3
People and Society Cognate Course		3
Elective		3
Elective		3
	Credit Hours	15
Senior Year		
Fall		
MAS 342	Introduction to Optimization and Decision Making	3
MGT 448	Global Sourcing	3
People and Society Choice Course		3
Elective		3
Elective		3
	Credit Hours	15
Spring		
MGT 401	Strategic Management	3
MGT 451	Supply Chain Analytics Practicum	3
People and Society Cognate Course		3
Elective		3
Elective		2
	Credit Hours	14
	Total Credit Hours	120

Rationale

Rationale

Rational

The department of Management is proposing a new undergraduate program leading to the Bachelor of Business in Supply Chain Analytics in the Miami Herbert Business school.

An undergraduate with a supply chain analytics major meets the entry-level educational requirement for a variety of career paths in business, manufacturing, and management. The 2020 Supply Chain Salary and Career Survey Report developed by the Association for Supply Chain Management shows that supply chain professionals holding at least a bachelor's degree have a median salary of 24% higher than the national median salary. Moreover, many fields and industries are transforming to apply big data into their business. Therefore, professionals in these industries need to understand and strategically apply data analytics within their roles. The proposed unique program integrates supply chain management with data analytics to enhance the career path for students.

Market Demand

Market Demand

An undergraduate with a supply chain analytics major meets the entry-level educational requirement for various business, manufacturing, and management career paths. Graduates are trained to optimize business performance as Data Analytics Managers. They can work as supply chain managers or logisticians in many industries such as healthcare and retails, among others, analyzing their supply chain. Graduates can also work as purchasing managers, acquiring products or services, and distribution managers in the manufacturing and distribution process. Moreover, they can apply their knowledge as operations research and data analysts, identifying problems, and creating solutions. These positions appeal to organized professionals with strong problem-solving skills and provide opportunities to advance to managerial positions. The proposed unique program integrates supply chain management with data analytics to enhance all these career paths considering recent big data and analytics trends. Many others enter graduate degree programs pursuing a Master's or Ph.D. in Supply Chain and Operations Analytics.

The United States Bureau of Labor Statistics predicts that the jobs in logistics, transportation, storage, and distribution management will increase by seven percent over a decade. This number is nine percent for operations and purchasing managers.

Several colleges and universities offer minors or majors in supply chain management. There are a few schools that offer an undergraduate program integrating supply chain with analytics. The credit hours for the supply chain management concentrations vary from 15 credit hours at the Ohio State University to 30 at Missouri State University and 36 at the University of Houston. The University of Houston offers a Supply Chain Management Minor requiring exposure to all the supply chain's functional areas. Most of the current programs (University of Maryland; Wayne State University; University of Texas ay Austin; East Carolina University) require 18 credit hours for completion. The Krannert School of Management at Purdue University offers an undergraduate degree in supply chain, information, and analytics, requiring 49 credits, including 12 credits in business analytics and 12 credits in supply chain and operations management. The proposed undergraduate major entails 21 required credit hours in addition to the University General Education, and Miami Herbert Business School required classes.

Relationship to Other Programs

Relationship to Other Programs

The proposed program in Supply Chain Analytics requires three courses from the Management Science (MAS) Department. An endorsement letter indicating the department's support is attached to the proposal. The proposed program also offers quantitative choice courses from Business Technology, Industrial Engineering, Management Science, and Marketing departments. A support letter from each department is attached to the proposal.

Library Resources Available and Needed to Support the Program

Library Resources and Needed to Support the Program

With the exception of two new requirements (MGT448 and MGT451), most of the courses are already offered within the school. These two courses will be taught in-load by an Assistant/Associate Professor whose area of expertise is supply chain and operations management. No new staffing is anticipated. The department has an endowment account that supports enhancement activities (guest speakers, field trips) for students, specifically in the supply chain management area. Such enhancements are already scheduled for the undergraduate student taking the elective course of MGT 445 and will be continued. No additional library resources are required.

Laboratory Facilities, Equipment, and Space Available and Needed to Support the Program

Not Applicable.

Other Resources Available or Needed to Support the Program

Not Applicable.

Curriculum

Program Curriculum

Program Curriculum

The proposed undergraduate major entails 21 credit hours in addition to the University General Education Requirements and the required classes for the Bachelor of Business Administration degree. Two new courses were, however, developed specifically for the undergraduate major (MGT448 and MGT451). One of these courses, MGT451, Supply Chain Analytics Practicum, is a capstone course that will expose students to actual supply chain leaders and learn from professionals as part of a consulting experience. The second new course (MGT448), Global Sourcing, is specifically designed to help undergraduates understand how a firm's sourcing process determines a firm's cost structure and its ability to compete effectively in terms of non-cost measures such as quality, variety, and speed.

Proposed Schedule of Course Offerings for the First Three Years

Course Offering

Dr. Zahra Azadi teaches MGT 445 and MGT 446 on a regular basis. She will continue to teach these two courses in Fall and Spring, respectively. She will also teach MGT 448. Her teaching load is six courses (eighteen credits) per academic year. MGT 451 will be taught by Alex Niemeyer, who is an associate professor of professional practice. He has a joint appointment with the departments of Management and Management Science. His teaching load is six courses (eighteen credits) per academic year.

MAS courses are offered and staffed regularly through the MAS department as part of the major/minor course offerings. A letter that indicates the MAS department supporting the proposed program is attached.

CIP Code

Proposed CIP Code

52.0203 - Logistics, Materials, and Supply Chain Management.

Faculty

Program Directors

Program Director

Dr. Zahra Azadi is an Assistant Professor of Professional Practice in the Department of Management at Miami Herbert Business School. She is an expert in operations and supply chain management. Her research focuses on data-driven optimization models for vaccine supply chain and distribution. She has taught undergraduate and graduate courses in operations and supply chain management over the past two years at the University of Miami.

Upload CV(s)

CV-Zazadi.pdf

Program Faculty

Program Faculties

No new staffing is anticipated. Here is the list of current faculties in the operations and supply chain management:

Dr. Nan Yang, Professor; Dr. Sammi Tang, Associate Professor; Dr. Harihara Natarajan, Associate Professor; Dr. Xin Geng, Assistant Professor; Dr. Zahra Azadi, Assistant Professor of Professional Practice; Dr. Alex Neimayer, Associate Professor of Professional Practice.

Also, MAS courses are offered and staffed regularly through the Management Science department as part of the major/minor course offerings. These courses are currently being taught by the following faculties:

MAS 332: Dr. Doug Lehmann; Associate Professor of Professional Practice.

MAS 432: Dr. Daniel McGibney; Assistant Professor of Professional Practice.

MAS 342: Dr. Christos Zacharias; Assistant Professor, and Jigar Patel; Assistant Professor of Professional Practice.

Students

Applicant Pool

Applicant Pool

This major is only available to Miami Herbert Business School undergraduates, pursuing a Bachelor of Business Administration, and meeting the math threshold of 3.6 for MTH 161, MAS 201, and MAS 202.

Enrollment Projections

Enrollment Projections

We expect to maintain an average of 30 students per academic term. Also, the proposed program may be an additional major for those students who qualify by virtue of meeting the math threshold.

Administration

Program Administration

The proposed program will be administered through the existing administrative structure.

Comparison

Peer Comparisons

Peer Comparisons

While many supply chain management degrees are offered at institutions across the United States, there are relatively few programs in supply chain analytics. Moreover, no program offers a four-year degree in Supply Chain Analytics in the state of Florida. The increasing dependence upon demand within data analytics in the supply chain sector supports the need for four-year degree programs in supply chain analytics for students.

Most of the current programs in supply chain management (University of Maryland; Wayne State University; University of Texas at Austin; East Carolina University) require 18 credit hours for completion. Most of these programs expose students to logistics, transportation management, and purchasing management areas. Moreover, Florida International University (FIU) in Miami offers a 4-year BBA degree in logistics and supply chain management. This program requires 21 credit hours, out of which 15 credit hours are focused on logistics and transportation and six credit hours on marketing. The proposed undergraduate major of BBA in supply chain analytics entails 21 credit hours, out of which 12 credit hours focus on supply chain management and strategy, three credit hours on optimization tools, and six credit hours on data analysis. Unlike the FIU program, the proposed unique program offers students an opportunity to analyze a real supply chain challenge from the capstone course, Supply Chain Analytics Practicum 451.

The Krannert School of Management at Purdue University offers a Bachelor of Science degree in the supply chain, information, and analytics, requiring 12 credits in business analytics, information system, and supply chain and operations management. Our proposed

program only focuses on supply chain and business analytics. A peer comparison between the proposed curriculum and offered coursework in business analytics at Krannert School of Management reveals that we require more coursework in supply chain and data analytics.

Documents

Attach Supporting Documentation
Supply Chain Supporting Documents.pdf

For Administrative Use Only

Plan Code
NEW

Degree Code
B.B.A.

Admin Degree Type
Single Degree

Print on Transcript
Yes

Admission Recruitment
Yes

Reviewer Comments
Patty Murphy (pxm491) (Mon, 11 Jan 2021 19:18:02 GMT): Although the proposed new program involves the creation of two new courses, it does not constitute a significant departure in terms of content from what the University currently offers. Therefore, notification to or approval from SACSCOC will not be required.
Leslie Leonard (m.mcginnis) (Tue, 19 Jan 2021 17:46:34 GMT): This new program proposal will be sent to the University Curriculum Committee for their review.

Key: 591

UNIVERSITY OF MIAMI
MIAMI HERBERT
BUSINESS SCHOOL

Linda L. Neider, Ph.D.
Professor and Chair, Department of Management
Professor, Department of Health Management and Policy

5250 University Drive
414E Jenkins Building
Coral Gables, FL 33146

Ph: 305-284-6123
lneider@miami.edu

MEMORANDUM

October 29, 2020

TO: School Council Members
Miami Herbert Business School

FROM: Linda L. Neider
Chair, Department of Management

SUBJECT: New major in Supply Chain Analytics

I enthusiastically support the proposal to initiate a new undergraduate major in Supply Chain Analytics. The proposed program, a collaborative effort between our operations faculty and a number of other areas, took a year to develop. The final version (attached) was then unanimously approved by the entire voting faculty of the Management Department.

Please feel free to contact Zahra Azadi, Nan Yang, Hari Natarajan for further information.

UNIVERSITY OF MIAMI
MIAMI HERBERT
BUSINESS SCHOOL

5250 University Drive
Coral Gables, FL 33146
Ph: 305-284-5206

MEMORANDUM

TO: Faculty Senate

FROM: Mrs. Blanca Ripoll
Secretary of the Faculty School Council
Miami Herbert Business School

DATE: November 23, 2020

SUBJECT: Unanimous approval of the Proposal for the Undergraduate Major in Supply Chain Analytics within the Department of Management for the BBA Degree

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On Friday, November 13, 2020, the School Council of the Miami Herbert Business School (MHBS) unanimously approved the proposal for offering an Undergraduate Major in Supply Chain Analytics within the Department of Management for the BBA Degree.

cc: Dr. L. Neider, Chair, Management Department
Dr. A. Olazabal, Vice Dean, Undergraduate Business Education

UNIVERSITY OF MIAMI
MIAMI HERBERT
BUSINESS SCHOOL

December 1, 2020

Faculty Senate
University of Miami
Coral Gables, FL

Dear Faculty Senate:

I write to extend my enthusiastic support of the proposed undergraduate BBA major in Supply Chain Analytics (BBASCA). The proposal was unanimously supported by the Department of Management faculty, and the Undergraduate Business Education Committee. It was read in School Council and was approved by that body on November 13, 2020.

The proposed curriculum of the BASCA will undoubtedly enrich our students' skills in supply chain analytics and augment their future career prospects.

Thank you for your support and collaboration. I look forward to working with the Faculty Senate on other matters in the future.

Sincerely,

John Quelch

Dean
Miami Herbert Business School

cc: Linda Neider, Chair of Management Department
Chester Schriesheim, Speaker of School Council
Ann Olazabal, Vice Dean for Undergraduate Business Education

UNIVERSITY OF MIAMI
MIAMI HERBERT
BUSINESS SCHOOL

TO: Linda Neider, Chair of the Faculty Senate
John Quelch, Dean of the Miami Herbert Business School
Ann Olazabal, Vice Dean of Undergraduate Business Education, MHBS

FROM: Michael Tsiros, Chair of Marketing Department

DATE: February 10th, 2020

SUBJECT: New major, Supply Chain Analytics

I write in support of the proposal by the Management department at MHBS for a new major: Supply Chain Analytics. The proposal has been approved by our School Council. When this curriculum is pursued, it will enhance our graduates with analytical skills that will serve them well in the current marketplace.

The Marketing department looks forward to serving undergraduate students in this major with elective courses in marketing research and marketing analytics. This proposal puts no additional staffing burden on our department.

MIAMI HERBERT
BUSINESS SCHOOL

From: Business Technology Department N.T. Plant (chair)

To: Department of Management

I write in support of the proposal by the Management department at MHBS for a new major: Supply Chain Analytics. The proposal has been approved by our School Council. When this curriculum is pursued, it will enhance our graduates with analytical skills that will serve them well in the current marketplace. The Business Technology Department looks forward to providing classes to undergraduate students in this major with elective courses: BTE 320. Introduction to Programming; BTE 324 Object Orientated Programming. This proposal presently puts no additional staffing burden on our department.

November 20, 2020

School Council
Miami Herbert Business School

The Management Science Department of the School is in full support of the Management Department's proposal for an undergraduate major in Supply Chain Analytics. It is understood that these majors will be required to take MAS 332, Data Acquisition, Preparation, and Visualization, MAS 342, Introduction to Optimization and Decision Making, and MAS 432, Data Analysis. We believe that this major will be an excellent addition and will be very good for our business students.

Sincerely,

Paul Sugrue
Professor and Interim Chair
Department of Management Science

From: Omachonu, Vincent K
To: Azadi, Zahra
Cc: Neider, Linda L.
Subject: Major in Supply Chain Analytics
Date: Thursday, March 5, 2020 2:12:06 PM
Attachments: image002.png

Dear Zahra,

This email confirms our support for your Supply Chain Analytics major by allowing your students to take two of our courses (IEN 465 and IEN 568) as electives. The Department of Industrial Engineering offers these two courses every year (IEN 568 Spring Semester ONLY, and IEN 465 Spring & Fall semester).

Regards,

Vincent

Vincent Omachonu, Ph.D., P.E.
Professor and Chair
Department of Industrial Engineering
College of Engineering
University of Miami
1251 Memorial Drive, Room 268
Coral Gables, Florida 33146

Phone: 305-284-2372
Email: vomachonu@miami.edu

UNIVERSITY OF MIAMI
DEPARTMENT OF
INDUSTRIAL ENGINEERING

draft syllabus

GLOBAL SOURCING

MGT 448

General Information

Instructor: TBA
Jenkins Building
Email:

Time/Location: TBA

Instructor Office Hours: by appointment

Pre-requisite: MGT 303

Course Overview and Objectives

Global sourcing is the collaborative and structured process of critically analyzing an organization's spending and using this information to make business decisions about acquiring commodities and services more effectively and efficiently. This course will provide students a framework for thinking about strategic sourcing and tools to effectively implement the global sourcing process. More specifically, the objectives of the course are:

1. To provide an overview of strategic sourcing and its application in today's global marketplace.
2. To understand how a firm's sourcing process determines a firm's cost structure and its ability to compete effectively in terms of non-cost measures such as quality, variety and speed.
3. To enhance knowledge and skills of cost management, negotiation, and other strategic sourcing tools.

Methods and Materials

The course uses a variety of teaching methods and materials. Classes will consist of lectures and discussions. Fundamental concepts are contained in lecture notes. Analytical tools are presented in lecture notes, discussed in lectures, and reinforced by homework assignments. Cases are used to illustrate the context and complexity of strategic issues.

Course Website
The course website on Blackboard will be used to facilitate course progression. It contains information on:

- Syllabus and Course Schedule
- Lecture Notes
- Assignments

Course schedule will be updated on a weekly basis, and can be used as a guide for readings and assignments.

Text and Readings

- Required readings: lecture notes and assigned reading materials.

1. Lecture notes contain fundamental concepts and examples. Lecture notes will be handed out at the beginning of the class and can also be found on class website. Lecture notes should be read carefully.
2. Assigned reading materials will be handed out in class. They should be read before the due class to facilitate comprehension, discussion, and coverage. Please use the course schedule as a guide for readings.

- Recommended readings: the following textbook serves as an additional source for the material, but it is not required.
  1. *Purchasing and Supply Chain Management (6th Edition),* by Robert M. Monczka, Robert B. Handfield, Larry C. Giunipero, and James L. Patterson.

Grading

Class Participation	**9%**
Individual Homework Assignments (8)	**8×2% = 16%**
Group Case Reports (3)	**3×5% = 15%**
Midterm Examination	**30%**
Final Examination	**30%**

Class Participation
You are expected to attend all sessions and actively participate in class discussion. Bring your name card to class, so that I can accurately assess your participation.

Individual Homework Assignments
Individual homework assignments aim at helping you prepare for the course materials before class. Each individual homework assignment requires you read an assigned reading material and answer some questions in a less-than-one-page report. The report will be graded on evidence of good reading and quality of writing.

Late assignments will not be accepted. Please submit a hard copy of your individual homework assignment before the class it is due. The highest eight individual homework assignment grades will count toward your course grade.

Group Case Reports
You will need to form a group with some of your class members to work on exercises in class and to work on case reports after class. Groups **must consist of 3 to 4 members**. Groups should be formed by the third class session (January 25th, 2017).

Your group will need to submit written reports on several cases. The highest three group case report grades will count toward your course grade. The reports must maintain some basic standards as follows: (i) **Reports should be typed and spell-checked**; (ii) **Results and analyses must be very clearly explained**. For example, printing a spreadsheet analysis output without clearly explaining what is done in it, and what is the conclusion drawn from it, is unacceptable; (iii) **Names of all team members must be typed** (if a member's name is missing, I will assume that this person is a "free rider" and hence his/her grade will be zero).

Specific case preparation guideline will be posted on Blackboard about a week in advance of the case due date.

You should work with your teammates on the group case reports and group problem sets. **Discussion with anyone outside of your group is not permitted.**

Late assignments will not be accepted. Please submit your group case report and all supporting analysis on Blackboard before its due time.

Exams

Midterm Exam: *date/tba*, in class.
This is a 75-minute exam, closed book and closed notes, closed computer, calculators allowed. A one-page, letter-size (8.5" ×11"), any font, any margin, double-sided crib sheet is allowed. This exam tests the course materials in the first half of the course.

Final Exam: *date/tba*.
This is a 90-minute exam, closed book and closed notes, closed computer, calculators allowed. A one-page, letter-size (8.5" ×11"), any font, any margin, double-sided crib sheet is allowed. This exam tests the course materials in the second half of the course.

Make-up exams will not be offered unless there is a documented serious illness or extreme personal circumstances. Please note that a job interview is *not* considered an extreme circumstance.

Re-grading

If you think that your performance on an assignment or exam has been underestimated, please resubmit your work, along with a *written* statement, within *seven* calendar days after receiving your graded assignment/exam, explaining clearly why you think that your grade should be adjusted. Your *entire* assignment/exam will be re-graded.

Honor Code

All undergraduate students are responsible for reading, understanding, and upholding the Undergraduate Student Honor Code. Students are expected to warn fellow students who do not appear to be observing proper ethical standards and to report violations of this Code. The absence of a signed pledge does not free a student from the ethical standards signed by this Code. To fulfill the responsibilities of membership in the University community, faculty and all other members of the community should report violations of this Code. On the web, you can find the honor code at www.miami.edu/bulletins/undergrad/honor_code.pdf.
ALL VIOLATIONS OF THE HONOR CODE WILL BE REPORTED TO THE HONOR COUNCIL.

Default UM SBA Policies on Student Conduct

(Endorsed by Vice Deans and Department Chairs)

Use of electronic devices in the classroom

Permission from the instructor is required for the use of **Cell Phones, Smartphones, PDAs, Laptops and Other Electronic Devices (such as recording equipment)** during class. Use of a laptop or Tablet PC is permitted only if: (1) it is used for class function such as taking notes or following lecture note, (2) the use does not distract the student from paying attention to class content, and (3) the use does not distract other students in class. Activities such as checking messages and browsing the internet are expressly prohibited.

Attendance

Each student is required to attend every class and attendance will be part of the grade. Faculty will excuse absences only in cases of documented serious illness, religious observance, civic obligation or participation in an activity approved by the Academic Deans Policy Council. If you need to miss class for religious observance or a civic obligation, please inform the instructor at least one week in advance. Any other reasonable absences (and up to a reasonable percentage of contact time) such as absences for work related travel for students in the Executive or WP programs, or family emergency may be excused at the discretion of the faculty upon receiving supporting documentation. It is the student's responsibility to contact the instructor within one week after any unanticipated absence. Instructors and administrators shall endeavor not to schedule any examination or other graded class event on a major religious holy day.

Arriving Late, Leaving Early, Coming & Going
Classes start on time and students must arrive to class on time and stay to the end of the class period. Students may enter class late only if given permission by the instructor and only if they can do so without disrupting the class. In addition, arriving late or leaving class early will have impact on the course grade as determined by the instructor. Please note that to minimize disruption to the class, instructors are not obligated to admit late students or may choose to admit them only at specific times.

Late Submission of Assignments
Late assignments will either not be accepted or will incur a grade penalty unless they are due to documented serious illness or a family emergency. Instructors will make exceptions to this policy for reasons of religious observance or civic obligation, only when the assignment cannot reasonably be completed prior to the due date and the student makes arrangements for late submission with the instructor in advance.

General Behavior
Students will conduct themselves with respect and professionalism toward faculty, students, and others present in class and will follow the rules prescribed by the instructor for classroom behavior. Students who fail to do so may be asked to leave the classroom with a grade penalty.

Disability Services

The Office of Disability Services (ODS) is the primary University office responsible for the coordination of auxiliary aids and services for students and employees with disabilities. Those seeking services and/or information should contact the Office of Disability Services to discuss individual needs. You can call the ODS at 284-2800, or visit them at Academic Development Center Suite N201, University Center any time between 8:30 a.m. and 5:00 p.m., Monday to Friday. More information is available on the web at
http://www.miami.edu/academic-development/addisab01.html.
Please contact the instructor if you need any assistance in this matter.

BRIEF COURSE SCHEDULE*

CLASS SESSION		TOPIC	CLASS ACTIVITIES AND DUE DATES
1	Jan. TBA	Introduction: Strategic Sourcing Process	
2	Jan. TBA	Make or Buy: Basic Concepts and Quantitative Analysis about Cost and Spend Analysis	
3	Jan. TBA		Submit Groups
4	Jan. TBA		
5	Jan. TBA		
6	Feb. TBA	Case Discussion: Scotts Miracle Gro: The Spreader Sourcing Decision (Ivey Case)	**Group HW 1** - Submit your group report before class starts.
7	Feb. TBA	Cost Modeling	
8	Feb. TBA		
9	Feb. TBA	Negotiation	
10	Feb. TBA		
11	Feb. TBA	Supplier Qualification Screening	
12	Feb. TBA	Supplier Selection	
13	Mar. TBA	Supplier Risk Management	
14	Mar. TBA	Supplier Performance Evaluation	
15	Mar. TBA	Case Discussion: Metalcraft Supplier Scorecard (HBS Case)	**Group HW 2 -** Submit your group report before class starts.
16	Mar. TBA	**Midterm Exam (in class)**	
	Mar. TBA	**No Class (Spring Break)**	
	Mar. TBA		
17	Mar. TBA	Sourcing Commodities	
18	Mar. TBA		
19	Mar. TBA	Sourcing Services	
20	Mar. TBA		**Group HW 3** - Submit your group HW 3 before class starts.
21	Apr. TBA	e-Sourcing, Online Auctions	
22	Apr. TBA		
23	Apr. TBA	Case Discussion: Procurement at Betapharm Corp. (HBS Case)	**Group HW 4 -** Submit your group report before class starts.
24	Apr. TBA	Sourcing via an Intermediary	
25	Apr. TBA		
26	Apr. TBA	Global Sourcing: Risk & Ethics	
27	Apr. TBA	Case Discussion: IKEA's Global Sourcing Challenge: Indian Rugs and Child Labor (A) (HBS Case)	**Group HW 5** - Submit your group report before class starts.
28	Apr. TBA	Managing Supplier Relationships	
	May TBA	**Final Exam**	

* subject to minor modification

UNIVERSITY OF MIAMI
MIAMI HERBERT
BUSINESS SCHOOL

MGT451: Supply Chain Analytics Practicum
Spring

Faculty: TBD
Office: Jenkins Building
E-Mail: TBD
Course Website: http://www.courses.miami.edu

Course Overview:

Practicums provide the opportunity to integrate and apply classroom learning in a real work environment, enabling students to observe and learn from professionals in the field. The Supply Chain Analytics Practicum course (SCAP) places students with organizations throughout the world to address pressing challenges related to operations and/or supply chain. Students work in teams with guidance from faculty advisors to develop actionable and valuable recommendations for sponsors.

For students, SCAP provides an opportunity to augment and integrate knowledge of fundamental supply chain concepts and tools learned in classroom settings. SCAP also offers opportunities to develop and test critical thinking and leadership skills via practical experience with real business challenges.

For sponsoring organizations, SCAP offers access to a high-caliber team of 4-6 students, the latest business concepts and tools, an external viewpoint, and rapid turnaround. The ultimate deliverable to the sponsor from a SCAP project is a set of actionable, data-driven recommendations.

SCAP projects are based on sponsor needs and address a wide range of business issues – from identifying new processes and improving existing operations to launching new products and targeting new growth opportunities. Sponsors may come from many different industries – from consumer products to financial services to healthcare to real estate to telecom. Sponsoring organizations may be large corporations, small entrepreneurial start-ups, or NGO's.

While each SCAP project is different in context, all have essential features in common. All confront students with a real business challenge of significant importance and no existing solution. All require applying concepts and tools from Supply Chain Analytics field. All require dynamic sensemaking, fact-based decisions, and high-performance teamwork. All unfold in unpredictable ways. All conclude with teams presenting actionable recommendations to project sponsors and faculty advisors.

SCAP Learning Objectives

The learning objectives of SCAP fall into three broad categories: Core

Business Knowledge

- Selecting appropriate core concepts and tools for application
- Adapting core concepts and tools to practical situations
- Integrating core concepts and tools

Critical Thinking Skills

- Dynamic opportunity-sensing and problem definition

- Collecting and analyzing data as an input tojudgment
- Innovative problem-solving

Leadership Capabilities

- Developing and participating on high-performance teams
- Navigating organizations, perspectives, and cultures
- Communicating clearly and persuasively

SCAP Learning Partners

The success of a SCAP project is dependent on a successful partnership between the student team, the sponsoring organization and its liaisons, and the student team's advisors.

Student Team

The primary objective of the student team is to demonstrate fulfillment of the SCAP learning objectives while producing valuable recommendations for the sponsoring organization.

A student team consists of 4-6 undergraduate students. Students completing the course receive 3.0 credit hours towards their degree and are naturally expected to devote themselves to successful completion of the project and agreed upon deliverables during the semester.

The student team is expected to work collaboratively with the sponsoring organization and faculty advisors to define the problem or opportunity to be addressed, collect and analyze relevant data, and develop actionable solutions. At the end of the project, the team presents final recommendations and provides a detailed written report. The student team is accountable for managing the project and the quality of all deliverables.

Sponsoring Organizations

Sponsoring organizations are the MHBS real-world partners in the SCAP learning process. Sponsors provide SCAP teams with challenging projects that have no obvious or existing solution. In return, sponsors expect high-quality, actionable recommendations.

Sponsor liaisons work with the student team to frame the project, help the team access relevant people and information, provide feedback on project deliverables, and ensure availability of adequate workspace and other appropriate resources. Many sponsors also handle project-related expenses for the student team, such as travel and lodging.

In addition to providing sponsors with a final presentation and report, student teams are expected to be proactive in ensuring on-going communication throughout the course of the project. Weekly contacts and a mid-term project review are strongly recommended. Student teams should discuss sponsors' communication preferences as early in the project as possible.

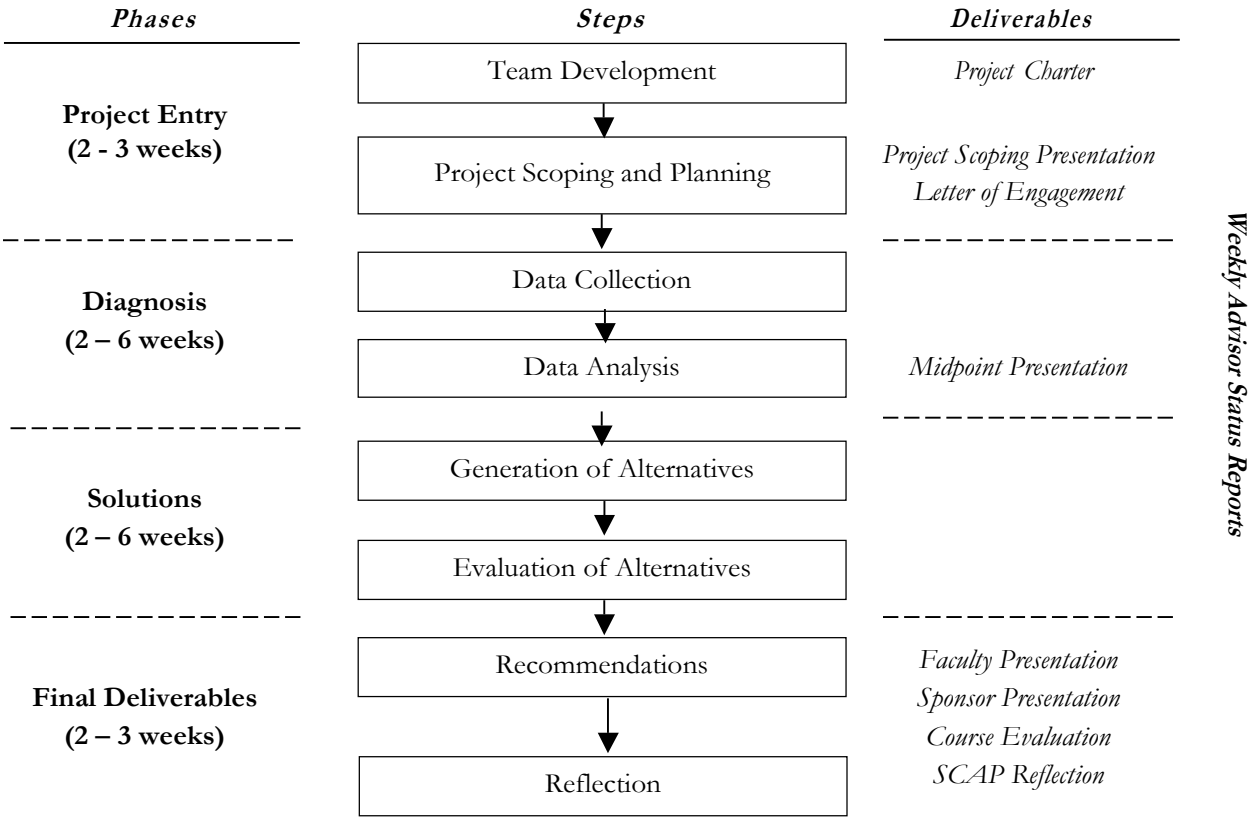
Advisor

The faculty provides suggestions and advice to enhance the team's degree of success, evaluate team performance and provide feedback to the team, and advocate a structured approach to SCAP and its learning objectives. The primary function of the faculty is to help the student team bring their SCAP project to a conclusion that is successful in the eyes of the sponsors, the faculty, and the student team itself.
It is expected that teams will take initiative to seek out faculty for input and keep them apprised as the project progresses. SCAP teams should meet or contact the faculty team at least once per week to report on project progress; discuss problems and opportunities; receive faculty advice, feedback, and suggestions; and reflect

on course learning objectives. Final responsibility for the success of the project, of course, lies with the student team.

SCAP Learning Process

There is a flow to SCAP that is common to all projects. The figure below illustrates the phases of project flow, the steps of the learning process associated with the phase, required deliverables, and the approximate timing. Detailed descriptions of each deliverable are provided later in this handbook. Please note that phases may overlap with one another and that timing is dependent on the nature of each individual project.



In the Team Development phase, students are assigned projects, develop team and personal viewpoints on project needs and goals, and determine how they will work together as a team. A Project Charter is required that defines project goals and how the team will work together towards successful completion.

During the Project Entry phase, teams assess project context, needs, and anticipated output; engage in opportunity-sensing and problem definition; develop a project scope statement; plan their work together; and establish an agreement between the team, faculty, and the sponsor regarding the project's goals, boundaries, work plan, and nature of the final deliverables. Teams are required to develop a Letter of Engagement that formally captures this shared understanding among the parties.

In the Diagnosis stage students collect primary and secondary data, analyze the information gathered, and begin identifying relevant findings – including preliminary conclusions and recommendations. Teams should discuss preliminary findings and diagnoses with faculty advisors and the sponsoring organization's liaison.

During the final phases of the SCAP process, teams work to generate and evaluate alternative solutions to address the issues identified, as well as how to persuade faculty advisors and the sponsoring organization regarding their final recommendations. It is highly recommended that teams discuss draft outlines of their report and presentations with a communication coach. Required deliverables include a final oral presentation to the team's faculty advisors, a final presentation to the sponsor organization, and a written report. In addition, reflection is an important element of any action-based learning experience and SCAP is no exception. The final required deliverables are the confidential peer and course evaluations.

SCAP Chronology: Timeline of SCAP Events and Deliverables

While the exact timing of the SCAP learning process is project-dependent, other aspects are more predictable. The calendar below provides a schedule of events and associated deliverables. Each is briefly described below. Detailed descriptions can be found later in this syllabus.

SCAP Kickoff – A required event that provides students teams with an orientation to SCAP. Initial meetings with faculty advisors and communication coach will occur during Kickoff.

Project Charter – The project charter is a living document that summarizes the project scope and how the team will work together towards its successful completion.

Project Update Meeting – Opportunity for the team to provide advisors with a progress report.

Project Scoping Presentation – Presentation to the sponsor describing the problem/opportunity to be addressed, goals, boundaries, expected deliverables, and work plan.

Letter of Engagement – A formal agreement between the team and the sponsor describing the problem/opportunity to be addressed, goals, boundaries, expected deliverables, and work plan.

Midpoint Presentation – Presentation to the sponsor summarizing the team's progress, preliminary findings, and potential challenges to fulfilling the project's goals.

Final Faculty Presentation – A presentation of the final recommendation made by the team to the faculty advisors. It is expected that students will present to faculty before presenting to the sponsor.

Final Sponsor Presentation – A presentation of the final recommendations made by the team to the sponsoring organization.

Written Report – A written report describing the team's research, analyses, and recommendations (maximum of 30 pages plus appendices).

Peer Evaluation – Each individual student is required to submit an evaluation of the quality and extent of each team member's contributions.

Course Grading

SCAP grades are based on faculty's overall assessment of team performance including final recommendations and supporting analysis, required deliverables and the conduct of the project. An individual student's SCAP grade may differ from the team grade if faculty evaluations of individual contributions and performance support such an adjustment (e.g., as indicated by peer evaluations).

SCAP Milestones and Guidelines

Early Sponsor Contact

Early communication with your sponsoring organization is imperative. You should communicate with the sponsoring organization as early as possible to clarify the scope of the project, identify any issues, and decide what data you might need to collect.

This is an excellent opportunity to discuss:

- The problem or opportunity the company wants you to address
- The deliverables the company expects you to provide
- Why the issue is important to the company
- The project's goals
- The project's customers
- The information available from the company

For this and subsequent meetings, plan your roles (see the Project Charter Section below). Choose a team leader early. Decide who will take the lead on each phase of the project.

Summarize orally to the client your perception of the client's expectations. This will help the client correct misperceptions and fill information gaps.

Get to know your company liaison. This is an opportunity for the liaison to learn more about the goals of the SCAP program and your personal goals for the project. It might also be your first chance to get to know your liaison. As a start, some of the issues you can discuss at the first meeting are:

- Backgrounds, both personal and professional, of the team and the company liaison
- Learning goals of everyone on the SCAP team
- Liaison's roles and responsibilities in the company
- Concerns anyone might have about the project

Your initial contacts with the client are very important for getting a solid start on your work. If any special problems or questions arise from your first discussions, you should communicate them as soon as possible to the faculty team.

Initial Advising Meeting

The Initial Advising Meeting is designed to provide the faculty and teams with an opportunity to begin to define the project scope and develop a tentative plan for completing the project. You will provide the faculty with a short, 1-2 page description of the project including the goals and a plan for the project. The faculty team will provide comments and suggestions regarding the scope and the tentative project plan. This document should be sent by email to the faculty team by 4pm the day before the initial advising meeting.

Project Charter

The SCAP project charter sets forth what the team is going to accomplish and how the team will work together towards a successful SCAP experience. It is intended as a living document ensuring shared understanding about the nature of the project, team responsibilities, and operating guidelines.

Project Scope Statement

The project scope statement is a brief summary of the problem/opportunity to be addressed, and the goals, boundaries, and expected deliverables for the engagement. It is strongly recommended that the statement be no longer than one page. For information on project scoping refer to the Project Management document on the SCAP student website.

For most teams, the project scope will evolve and change throughout the Project Entry Phase. The team should prepare a preliminary project scope statement to be submitted as part of the Project Charter prior to the first weekly meeting with the team's faculty advisors.

The scope should be finalized by the end of the Project Entry Phase and a final version of the project scope statement should replace the preliminary version in the team's Project Charter. Please see the section of this Handbook on 'Letter of Engagement' for more on project scoping.

Team Charter

The Team Charter is intended to be a living document that guides and improves the effectiveness of your teams. The Team Charter will assist teams in:

- Establishing an open team atmosphere
- Clarifying expectations of the Company Liaison
- Preparing for interaction with the faculty

The Team Charter specifies the roles of individual team members and is to be submitted to the SCAP faculty at the Initial Advising meeting. The Team Charter will describe:

Roles	-	Clarify expectations the team has for the individual fulfilling each role Determine who will serve the team in specific roles, such as: leader,
	-	facilitator, scribe, timekeeper, communications liaison, etc.
Team Processes & Ground Rules	-	Describe how the team members will work together: frequency of team meetings, records to be kept, problem-solving model to be used, when and to whom updates of progress will be given, how the team will ensure all members contribute, how the team will deal with members who do not fulfill responsibilities of quality and timeliness of deliverables, etc.

The Initial Company Meeting

The initial on-site company meeting is designed to acquaint the company liaison and sponsor with the team and to provide an opportunity for the team to (a) finalize the scope of the project and (b) aid the development of the project plan. Everyone on your team is expected to attend this meeting.

Research for this meeting should start after SCAP Kickoff. By doing this analysis at the very beginning of the project, you will be more knowledgeable in your introductory contacts with the Company and the initial on-site meetings with the sponsor and/or liaison and will be able to get off to a quick start on the project.

The following issues should be considered when preparing for this meeting:

- Industry Analysis
  - What is the industry structure and who are the major competitors?
  - What are their competitive positions and strategies?
  - What is the value chain for this industry?
  - What success factors are key in this industry?

- Firm Analysis
  - What is the sponsoring firm's strategy?
  - What are its sources of competitive advantage?
  - What are the strategic issues facing the firm?

- Project Definition
  - What is the specific context for your project (i.e., division, department)?
  - What is the problem or opportunity to be addressed?
  - What is the scope of the project?
  - Who are the stakeholders relevant to your project?
  - What are some possible key performance measures?

The team might not have detailed answers to all of these questions at the beginning of the project, but they should have initial answers by the end of the first week.

Project Scoping Presentation

The purpose of this presentation is to update all parties on your progress and to discuss your plans for completing the project. If possible, this meeting should take place at the Company to allow the faculty member or members to meet the liaison and sponsor. You will make a presentation to the sponsor and faculty advisors for 20-30 minutes, with the remainder of the time spent discussing the project.

The team's goals in the presentation are to:

- Convey your understanding of the scope of the project.
- Convey your understanding of the target process, problem, or opportunity. Describe the project boundaries and the major steps. Provide a high level flowchart of the process, if applicable.
- Present a project timetable. Emphasize project milestones rather than details of project activities.
- Identify concerns or issues with which the liaison or advisor might be able to help.

A suggested outline for the discussion is as follows:

Project:	Provide brief comments on project scope and the significance of the project within the company
Process, Problem, Opportunity:	Describe the project and include a flowchart, if applicable
Plan:	Present goals, timeline, procedures, data to be collected, performance measures to be used, and resources allocated. Describe links between the company's problem, the project goals, the proposed project deliverable, and measure of improvement
Concerns:	Describe any concerns or questions

Please email, at least 24 hours in advance, copies of the presentation to the faculty team so they can provide comments and suggestions. At a minimum, you should include a one page executive summary of your presentation, a flow chart (if relevant), an annotated project timeline, and copies of your overheads.

Letter of Engagement

During the Project Entry Phase, the team works towards developing a clear understanding of project goals, boundaries, expected deliverables, and a summary work plan for completing the project successfully. The team develops a formal Letter of Engagement to be signed by both the team and the sponsor. The purpose of the Letter of Engagement is to ensure shared understanding between the team, sponsor, and faculty advisors about the nature of the project and expected outcomes. The Letter of Engagement also serves as a contract to which all of the parties can refer over the course of the project.

The main components of the Letter of Engagement are:

Project scope statement

- Problem Definition/Opportunity Identification
- Project goals
- Project boundaries
- Expected deliverables

Summary Work plan

- Schedule
- Milestones

The project scope statement is a brief summary of the problem/opportunity to be addressed, and the goals, boundaries, and expected deliverables for the engagement. It is strongly recommended that the statement be no longer than one page.

Determination of the project's scope is a top priority for teams during the Project Entry Phase. Teams should begin the process of scoping the project immediately after SCAP Kickoff. The team should carefully assess the project proposal and begin analysis of the project context – significance of the project to the organization, parties affected, decision-maker involved, resources required, and so on. The team should work towards clearly defining the problem/opportunity, what the goals of the project should be, what is and is not part of the project scope, and the nature of expected deliverables. The objective is to craft a project scope statement that clearly articulates these elements and ensures the project can be completed successfully given the available time, resources, and support.

The summary work plan should provide all parties with a high-level overview of how the project scope will be successfully completed. The work plan should provide a schedule for the remaining stages of the project and what needs to be accomplished to complete each one.
In terms of process, the team should begin by developing a preliminary project scope statement early in the Project Entry Phase to review with the sponsor. The preliminary scope statement should also be included in the team's Project Charter and discussed with faculty advisors at the first weekly advising meeting during the second week of the project.

The team should continue to work on the project scope and refine the project scope statement for inclusion in the Letter of Engagement, as well as develop a summary work plan for how the project will be executed. A draft of the Letter of Engagement should be given to both faculty advisors and sponsors for review. Your Communication Coach can also provide feedback on clarity, completeness, and tone. Once there is general agreement among all parties, the Letter of Engagement should be signed by the team and the sponsor. Copies of the final version should also be sent to faculty advisors.

Midpoint Presentation

The purpose of the midpoint presentation is to update all parties on the team's progress, initial findings, and any potential challenges to fulfilling the project's goals.

The midpoint presentation should include:

- Brief review of the project's objectives and workplan
- Summary of preliminary findings
- Identification of challenges the team is encountering
- Any recommended changes in the project scope and workplan

The team's is to ensure everyone is informed of the team's progress and aligned with the project's objectives. Typically, the team presents for 20-30 minutes, with the remainder of the time spent discussing the project.

Recommendations Review

The purpose of this meeting is to provide the faculty with an opportunity to review the group's final recommendations before they are presented to the client. This meeting will take place at the Business School unless there is a specific reason for it to take place at the Company site. The intent is to identify and build on the strengths in your analysis and to avoid any major omissions. You will make a presentation for 20-30 minutes to the faculty member or members present, with the remainder of the time spent discussing the recommendations and their justification. Although the presentation is informal, you will need to prepare overheads for handouts for the 20-30 minute presentation.

Assume that the faculty have the presentation from the previous meetings. Do not spend time covering information that was presented previously. Start with a brief statement of the issue being studied and then move quickly to your analysis and project progress. At minimum, the faculty will be looking for evidence that your recommendations are logical and are based on the following:

- A thorough understanding of the process, problem, or opportunity
- An assessment of its critical success factors
- An analysis that considers problems related to those critical success factors
- A consideration of relevant literature
- Quantitative and qualitative data

You should be prepared for challenging questions at this meeting because this is the last formal meeting before you complete your report.

You will need to email (or fax if email is not available), in advance, copies of the presentation to the faculty team so they can provide comments and suggestions. At a minimum, you should include a one page executive summary of your presentation and copies of your presentation. These should be sent 24 hours in advance to give the faculty time to prepare.

Final Presentation to Faculty

You will present your final report findings to the SCAP faculty team at the school. During the question and answer session, the faculty will probe aspects of your written report. The faculty will also assess the degree to which you have met the goals established in your project.

In addition to recommendations supported by substantive evidence, the reports are likely to include:

- Project objectives
- Overview of the target process, problem, or opportunity
- Methodologies used
- Explanation of costs, benefits, and implementation issues
- Justification for or significance of changes recommended
- Ancillary recommendations
- Other considerations or areas of concern

Some of the above information might not be included in the final presentation because of time constraints. However, all the listed information should be included in the written report. Your faculty team will help you in planning what to include in your final presentation.

Final Presentation to the Company

SCAP projects typically conclude with a formal oral presentation of selected report findings to representatives of the host company. You will present your final report findings to the Company at a mutually convenient time. The form and content of this presentation depends on the Company. Some Company presentations are much longer than the presentation to the faculty. You should work with your liaison from the beginning to develop an understanding of what the Company expects.