

Maryland in Europe Graduate Programs
Bowie State University

Planning, Budgeting and Evaluation
MGMT 503

Jan. 25-26, Feb. 8-9, Feb. 22-23, and Mar. 8-9, 2003
Heidelberg- Patton Barracks
Sat/Sun, 09:00 - 16:00

Instructor: DR. DAVID E. MCNABB
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Consultation:

Course Description: Deals with systematic, policy/project formulation and evaluation that take place in formal organizations. It presents the processes and techniques for strategic planning, resource utilization planning, and an introduction to capital facilities planning. *Students in the MIS program are not eligible for MGMT 503.*

Course Goals: Upon completion of the course, students should have an understanding of:

1. Planning, budgeting, and evaluation models used in the public sector
2. The techniques used to implement the models
3. The decision-making process and how it affects planning
4. The relationship between planning, budgeting, and evaluation and the political, economic, cultural, and technical environments
5. The importance of the group process to the planning, budgeting, and evaluation processes

Course Objectives: Upon completion of the course, students should be able to:

1. Analyze case studies as part of a team
2. Analyse case studies independently
3. Present case study analysis orally
4. Develop program evaluation planning documents

Required Text: NOTE: Some texts are used in multiple classes

Whellen, T. L. & Hunger, J.D. (2002). *Strategic Management and BusinessPolicy*, 8th ed. Upper Saddle River, NJ: Prentice Hall.

Weiss, C. H. (1998). *Evaluation*, 2nd ed. Upper Saddle River, NJ: Prentice Hall.

American Psychological Association. (2001). *Publication Manual of the American Psychological Association*, 5th Edition. Washington DC: Author

Students will also be required to examine outside reading material pertaining to strategic management applications and their selected case analyses

Grading Information: Grades for this course will be assigned as follows:

A	90% +	C	70 – 79%
B	80 – 89%	F	Below 70% F(a) or regular non-attendance F(n)

Grades of Incomplete or Withdrawal are governed by Maryland in Europe policies. Please refer to UMUC Maryland in Europe Graduate Catalog, available in your local Education Center or online at http://www.ed.umuc.edu/visit/pubs/catalog/grad_02-03.pdf, for further details.

Course Requirements:

Examination on Chapters 1 to 6	25 points
Examination on Chapters 7 to 13	25
Comprehensive Written Case Analysis	25
Team Oral Presentation of Case	5
Evaluation Program Outline	10
Homework Assignments	10

Student Responsibilities:

- Two (2) essay examinations, a mid-term and a final.
- Students are also responsible for several written assignments. These include:
 1. A comprehensive team analysis of one of the cases. This analysis has two parts: a 10- to 20-page written report, and an oral presentation to be made on the last day of class. Teams of from 3 to 4 students should work together on this project.
 2. A 1- to 3-page outline of a plan for evaluating a real or hypothetical program of the student's choice. This is an individual project.
 3. Students are also required to hand in a ½-page summary of each the cases that are scheduled for in-class discussion [NOT the final team-presented cases]. These summaries must be handed in at the time the case is discussed. These are individual projects.
- Student teams may select from the following cases [available on a first-come, first-served basis; selections must be made on the first day of class]:
 - Singapore Telecom
 - Larry Ellison (Oracle Corp.)
 - Cisco Systems
 - Carly Fiorina (Hewlett-Packard)
 - Harley-Davidson

- Reebok
 - Home Depot
 - Arm & Hammer
 - K-mart
 - Carnival Corp.
 - Boeing
 - Mercedes-Benz
- This is a graduate education program; students cannot miss class other than for military deployment or TDY assignments without suffering a reduction in their grade. No personal holiday or vacations are to be taken during the class (these will not be considered as excused absences). Acquiring notes on missed classroom information is the responsibility of each student. Be aware that examinations may include material presented in class but not contained in the text.

Evaluating student team case analyses:

A 5-point scale will be used to evaluate both the written and oral sections of the team analyses. Components included in the instructor’s evaluation include the following:

- Written Report:
 1. **Mission Statement**
 2. **Thoroughness, accuracy and depth of external analysis**
 3. **Thoroughness, accuracy and depth of internal analysis**
 4. **Identification and evaluation of alternative strategies using matrices**
 5. **Quality, quantity, feasibility and relevance of recommendations**
 6. **Justification and support for recommendation**
- Oral Delivery of Report:
 1. **Organization of presentation**
 2. **Professionalism of presentation**
 3. **Use of visuals and color**
 4. **Communication skills of team**
 5. **Use of time**
 6. **Handling of questions**

Course Schedule:

First Sat 01/25/03	First Sun 01/26/03	Second Sat 02/08/03	Second Sun 02/09/03
9:00 <u>Syllabus & Ch. 1</u>	9:00 <u>Chapter 14</u>	9:00 <u>Chapter 6</u>	9:00 Mid-Term Examination
Lecture/Discussio	Lecture/Discussion	Lecture/Discussion:	Chapters 1-7

n: <i>Introduction to Strategic Management</i>	: <i>On the Case Method</i>	<i>Strategy Formulation</i>	
10:20-10:40 Break	10:20-10:40 Break	10:20-10:40 Break	10:20-10:40 Break
10:40 - 12:00	10:40 - 12:00	10:40 - 12:00	10:40 - 12:00
<u>Chapter 2</u> Lecture/Discussion: <i>Corporate Governance and Responsibility</i>	<u>Case Discussion:</u> Case: <i>"Dr. Koop.com"</i>	<u>Case Discussion</u> Case: <i>"Wal-Mart Stores"</i>	<u>Chapter 8</u> Lecture/Discussion: <i>Organizing for Action</i>
Lunch	Lunch	Lunch	Lunch
1:00	1:00	1:00	1:00
<u>Chapter 3</u> Lecture/Discussion: <i>Environmental Scanning: External Factors</i>	<u>Chapter 5</u> Lecture/Discussion: <i>Strategy Formulation: SWOT and Strategy</i>	<u>Chapter 7</u> Lecture/Discussion: <i>Strategy Formulation</i>	<u>Chapter 9</u> Lecture/Discussion: <i>Staffing and Directing</i>
2:20-2:40 Break	2:20-2:40 Break	2:20-2:40 Break	2:20-2:30 Break
2:40	2:40	2:40	2:30
<u>Chapter 4</u> <i>Environmental Scanning: Internal Factors</i>	<u>Case Discussion:</u> Video Case: <i>"Newbury Comics"</i>	<u>Case Discussion:</u> Case: <i>"Gardner Distribution Company"</i>	<u>Case Discussion</u> Case: <i>"The Carey Plant"</i>

Third Sat 02/22/03	Third Sun 02/23/03	Fourth Sat 03/08/03	Fourth Sun 03/09/03
9:00 <u>Chapter 10</u>	9:00 <u>Chapter 11</u>	9:00 <u>Chapter 12</u>	9:00 <u>Team Presentations</u>
Lecture/Discussion: <i>Evaluation and</i>	Lecture/Discussion: <i>Issues in</i>	Lecture/Discussion: <i>Issues in</i>	

<i>Control</i>	<i>Technology and Innovation</i>	<i>Entrepreneurship</i>	
10:20-10:40 Break	10:20-10:40 Break	10:20-10:40 Break	10:20-10:40 Break
10:40 - 12:00	10:40 - 12:00	10:40 - 12:00	10:40 - 12:00
Evaluation Discussion Lecture/Discussion: Read C. Weiss: Chapters 1-3	<u>Case Discussion:</u> Case: "Apple Computers"	<u>Case Discussion:</u> Case: "Inner-City Paint"	<u>Team Presentations</u>
Lunch	Lunch	Lunch	Lunch
	1:00 <u>Video</u> <u>Case Discussion:</u> Lecture/Discussion: Read C. Weiss: Chapters 4-6 Applying Evaluation Plans	1:00 <u>Chapter 13</u> Lecture/Discussion: <i>Issues in Not-for-Profit Organizations</i>	1:00 <u>Team Presentations</u>
2:20-2:40 Break	2:20-2:40 Break	2:20-2:40 Break	2:20-2:40 Break
2:40	2:40	2:40	2:40
<u>Case Discussion:</u> Case: "Maytag Corp"	<u>Class Discussion: and Reports:</u> 2 to 4-page due: Individual paper-- Outline of an Evaluation Plan.	Final Examination Chapters 8-13	<u>Team Presentations</u>

Academic Policies: Please refer to the UMUC Maryland in Europe Graduate Catalog, available online at http://www.ed.umuc.edu/visit/pubs/catalog/grad_02-03.pdf or from your local Education Center, for information on the following:

Academic Integrity
Course Load
Exception to Policy
Grade Appeal Process
Make-up Examinations
Nondiscrimination
Students with Disabilities

Code of Civility

To promote a positive, collegial atmosphere among students, faculty, and staff, Maryland in Europe has developed the following Code of Civility:

Respect

Treat all students, faculty, and staff with respect and in a professional and courteous manner at all times and in all communications, whether in person or in written communication (including e-mail).

Kindness

Refrain from using profanities, insults, or other disparaging remarks.

Truth

Endeavor to cite only the truth and not knowingly misrepresent, mischaracterize, or misquote information received from others.

Responsibility

Take responsibility for our own actions instead of blaming others.

Cooperation

Work together with other students, faculty, and staff in a spirit of cooperation toward our common goals of seeking and providing quality education.

Privacy

Strive to uphold the right to privacy and not talk about others.

Nondiscrimination

Respect the differences in people and their ideas and opinions and reject bigotry.

ADDENDUM: ANALYSIS OF A CASE:

CHAPTER 14 OF YOUR TEXT GOES INTO GREAT DETAIL REGARDING THE METHODOLOGY OF MANAGEMENT CASE ANALYSES AND THE FORMAT FOR WRITTEN CASE REPORTS. THE ATTACHED MATERIAL IS A CHECKLIST THAT STUDENTS MAY ALSO FIND HELPFUL.

COMPONENTS OF THE ANALYSIS

Case analyses should be constructed around these five basic sections or components:

1. SITUATION ANALYSIS

- What is the purpose of the case?
- What is the mission of the organization?
- What are the organization's Product(s) or Service(s)?
- Markets or clientele served?
- Organization's Competition?
- Organization's Strengths?
- Organization's Weaknesses?

2. CHALLENGES AND OPPORTUNITIES

- What is the key external environmental factor or factors? Why?
- What is the impact of the Demographic environment?
- What is the impact of the Legal/Political environment?

- What is the impact of the Economic environment?
- What is the impact of the Socio-cultural environment?
- What is the impact of the Technological environment?
- What internal challenges and opportunities affect the organization?

3. FORMULATION AND EVALUATION OF ALTERNATIVES

- What are the feasible courses of action?
- What is the financial analysis of each?

4. SELECTION OF ONE ALTERNATIVE (DECISION)

- A clear and specific recommendation for action based on one or more of the identified alternatives.

5. PROVISIONS FOR IMPLEMENTATION OF THE PLAN

- How and by whom the decision is to be carried out.