Business Management Department

Senior Project Guide

for

Business Projects

Business Senior Project Guide

Oregon TECH

Business Senior Project Expectations

Welcome to Senior Project!

Welcome to Oregon Tech's Business Senior Project. This series of courses will be an opportunity for you to pursue your passions and career goals while challenging yourself to produce a long-lasting product for your sponsors and a significant experience for yourself. This year-long, hands-on project requires you to apply knowledge of your major, and also incorporates a host of other business skills to help fully develop your business toolbox to meet the needs of today's global workplace.

A fundamental approach of this senior project design is that you will seek out your own project in concert with your career goals. You will employ a project management methodology that guides your work through a detailed project charter. This requires exploration of the organization, its mission, business functions, and stakeholders to develop a problem statement and approach. The project's research requirements include peer-reviewed studies, industry and market data, interviews of business experts and partners, and gathering of internal data, all of which are analyzed using various business tools. Throughout the project you must interface with your project sponsor regarding the project plan, milestones, and final results using a host of communication and presentation methods.

Previous completed projects have included comprehensive marketing strategies, gap analysis and an implemented request for purchase (RFP) process. Students have created efficiency studies in manufacturing and healthcare facilities utilizing six sigma tools. Completed projects also include community redevelopment plans and business feasibility studies. Projects are often adopted by sponsors and a handful of projects are institutionally published. Students are regularly hired by their industry sponsor or have a jump start in their job search through this experience. The employment rate of our majors within six months of graduation is between 76 and 100%.

2016 Senior Project Expo

Senior Project Overview

Overview: The six-credit business capstone courses provide students with an opportunity to research and solve a real business problem with an organization of their choice over a nine-month period. Students work with a client in a business environment to develop solutions that could be put to use by the client. Students develop their project charter and research approach, analyze data using business methodologies, and make conclusions and recommendations. During this process, students interact professionally with their sponsor using a number of informal and formal methods of communication. Students produce a comprehensive final report and presentation their findings at the Senior Project Expo (Klamath) or in a presentation. During this process, students also develop a number of career skills to aid them post graduation.

BUS495: **(Discover & Plan)** This first class aids the student in the process of identifying a senior project suitable for expectations in their major and career goals. A project charter is developed which focuses on the project problem, timeline, initial research and research approach. *Pre-requisite: MGT 335, BUS 456, W227.*

BUS496: **(Research & Apply)** From the project charter and plan developed in BUS495, students spend the term gathering primary and secondary data to be applied for their project approach and analysis goals. Additionally, the students conduct an environmental scan of the organization and its industry. The term ends with the completion of an interim project report. *BUS495 with C or better.*

BUS497: **(Analyze & Present)** Students analyze the data that has been gathered in accordance with their project approach. They integrate business theories with this data to develop conclusions and recommendations to their sponsor. A final project report is completed and students present their results. *Pre-requisite: BUS496.*

Course Series Outcomes

Upon completion of the senior project series, students will be able to:

- Communicate the major concepts in the functional areas of accounting, marketing, finance, information technology, and management.
- Describe the legal, social, ethical, and economic environments of business in a global context.
- Solve organization problems, individually and/or in teams, using quantitative, qualitative, and technology-enhanced approaches.
- Demonstrate professional communication and behavior.
- Apply knowledge of business concepts and functions in an integrated manner.

Discover & Plan

BUS495

- Identify a suitable project that requires a business solution and meets major requirements
- Develop an annotative bibliography of resources
- Based on research develop a project research approach that utilizes one or more business methods/tools.
- Create a project charter that is signed off by faculty mentor and project sponsor.

Apply professional and career skills

Research & Apply

BUS496

- Complete all data gathering for your project, which may include primary or secondary research.
- Complete a literature review relating the topic to current management practice and the project
- Conduct a fully environmental analysis of organizati, industry and stakeholders.
- Complete interim project report & mid-project update memo
- Apply professional and career skills

Analyze & Present

BUS497

- Complete data analysis for the project while applying business methods/tools.
- Complete written senior project report
- Deliver presentation or particpate in poster session.
- Prepare a reflection paper discussing how your applied your education to your project and otherlessons learned
- Apply professional and career skills

Faculty Mentors

Along with continuous guidance from your senior project instructor, you will be required to interface with a faculty member who is a subject matter expert in your major. This faculty member within your major will help guide your project specifically in the areas such a research methods and tools most appropriate for your project. This faculty member will also sign off on your project charter and be copied in on your mid-point and final sponsor update memos. This faculty member will be part of the assessment of your final project. Also, you also may need to reach out to other department faculty for additional guidance or resources.

	Klamath Falls Faculty	
Faculty	Areas of Expertise	E-Mail Address
Mark Ahalt	Entrepreneurship Small Business/Business Development Real Estate General Business	Mark.ahalt@oit.edu
Richard Bailey	Accounting, Finance	richard.bailey@oit.edu
Sandra Bailey	Accounting, Finance Organizational Behavior	Sandra.bailey@oit.edu
Sharon Beaudry	Human Resources Business and Employment Law General Business	Sharon.beaudry@oit.edu
Don DaSaro	International Business Engineering Management Leadership General Business	Don.dasaro@oit.edu
Jeff Dickson	Health Informatics Heath Care Management Information Technology	Jeff.dickson@oit.edu
Carmen Morgan	Accounting, Finance	Carmen.morgan@oit.edu
Hallie Neupert	Economics Organizational Behavior General Business	Hallie.neupert@oit.edu
Pat Schaeffer	Operations Heath Care Management Six Sigma	Pat.schaeffer@oit.edu
Kristy Weidman	Marketing Management	Kristy.weidman@oit.edu
	Wilsonville Faculty	
Grant Kirby	Systems Analysis Networking	Grant.kirby@oit.edu
Mike Pierce	Operations General Business	Mike.pierce@oit.edu
Kris Rosenberg	Cyber Security Information Technology	Kris.rosenberg@oit.edu
Maureen Sevigny	Economics Environmental Business General Business	Maureen.sevigny@oit.edu
Lindy Stewart	Health Informatics Heath Care Management	Lindy.stewart@oit.edu

Specific Degree Outcomes by Major

Each major within the BUS senior project also has specific outcomes associated with their major. Therefore, along with meeting the general outcomes, you will also be evaluated based on your major requirements.

The following pages outline these major outcomes as well as provide project ideas, tools and requirements by major. Please review these carefully so that the project you identify will fall into these parameters.

Heath Care Management: Interpret health policy and systems**.** Assess the sustainability of Healthcare Organizations.

Marketing: Analyze an organization's activities to develop/implement a marketing strategy.

Operations: Demonstrate knowledge of fundamental concepts of operations management. (Examples: scheduling; forecasting, capacity, logistics, and materials planning; supply chain management; inventory control; Sales & Operations Planning (S&OP), etc.)

Small Business/ Entrepreneurship: Analyze the internal/external factors affecting a business/organization to evaluate business opportunities.

Technology & Management (BAS): Analyze leadership roles and styles. Apply knowledge of approaches to operational performance improvement.

Heath Care Management

Program Outcome
Interpret health policy and systems**.** Assess the sustainability of Healthcare Organizations.

How to Meet this Outcome

Senior projects in healthcare should include projects that cover healthcare policy and systems, as well as, an assessment of the organization's sustainability. Examples to meet these outcomes include (not inclusive list):

Health Policy & Systems:

- Demonstrate the understanding of the impact the project may address. For example, if the project is a workflow study for billing efficiencies, it may impact the re-imbursement schedule for Medicare and or private insurance. Addressing this would demonstrate understanding of insurance policy.
- Determining how different patients may impact overall income. A Medicare patient, as an example, will not bring payment to the clinic for up to six months. If the clinic is expanding operations, each patient brings different revenue to the clinic.

Assess the Sustainability of the Healthcare Organization:

- The evaluation of financial and operational impacts such as a cost benefit analysis, workflow / efficiency / cultural studies.
- An analysis of specific financial ratios (ROI, NPV, Break Even as an example).
- Evaluation of an EMR module installation, include supply impacts (how will providers be affected), how long is it expected to take to recover productivity etc.

Previous senior projects have included:

- Analysis of mobile mammogram technology to service unique cultural needs of remote Alaskan Indian and Native women.
- The implementation of a centralized check-in and patient quality improvement measures at a health care facility.
- A patient flow analysis looking at workflow processes, patient survey feedback, and the organizational structure of a local dentist practice.

Health Care Management Subject Matter Expert Faculty:

- Jeff Dickson, Associate Professor
- Pat Schaeffer, Associate Professor

Marketing

Program Outcome
Analyze an organization's activities to develop/implement a marketing strategy.

How to Meet this Outcome

A marketing senior project should focus on the development of a marketing strategy for a new product, business or expansion. This can be a broad plan for the whole organization/product that considers most of the areas below. Or the project can be a more focused and in-depth effort into a particular marketing area (such as social media strategy or pricing strategy). Elements of marketing strategy would include (not inclusive list):

- Research of current industry landscape and competitors. This also may include a customer analysis by analyzing geographic and census data.
- SWOT analysis reviewing company's strengths, weaknesses, opportunities and threats (based on research).
- Product, Price, Place, Promotion analysis (based on research). For example, a price analysis might include research of products in the market, demand curve, cost analysis (direct, indirect costs and ROI), pricing strategy (i.e. low cost vs price leader) and product life cycle approach.
- Target Market: Identification of your existing and potential customers and their needs.
- Messaging: A marketing message should be consistent and clear about the benefits the company's product or service will offer its customers.
- Activities: Marketing activities typically build on the company's strengths and the needs of the target market, include advertising, public relations, social media, couponing, product giveaways, community involvement, customer appreciation events, promotional events, and customer surveys. These strategies can include push strategies targeting wholesales and retailers and pull strategies targeting the end user.
- Budget: The cost of promotions, marketing materials, events and an estimate of the revenues that will be generated from these activities.

Previous senior projects have included:

- Marketing strategy for educational film that included distribution analysis and website development and implementation.
- An analysis of the results and effects of customer satisfaction survey for a major west coast retailer.

Marketing Subject Matter Expert Faculty:

- Kristy Weidman, Assistant Professor

Operations

Program Outcome:
Demonstrate knowledge of fundamental concepts of operations management.

How to Meet this Outcome

Operations students should focus on improvement of an aspect of a business that uses one or more of the operations concepts (not inclusive list):

- Scheduling
- Forecasting
- Capacity
- Logistics
- Materials planning
- Supply chain management
- Inventory control
- Sales & Operations planning

Previous senior projects have included:

- Inventory control analysis and improvement for a restaurant
- Customer queuing analysis and improvement plan
- Error rate analysis to increase registration process
- Capacity analysis to increase number of customers and ROI

Six Sigma Certification: Operations project often incorporate a lean six sigma approach. Those students utilizing a six sigma approach can also choose to pursue Green Belt certification. Keep in mind that the timing of senior project and the certification may not completely coincide due to different requirements. Discuss Green Belt certification with Professor Pat Schaeffer. Note: Green Belt Certification is open to all majors.

Marketing Subject Matter Expert Faculty:

- Pat Schaeffer, Associate Professor (Six Sigma Black Belt)
- Mike Peirce, Associate Professor

Small Business/Entrepreneurship

Program Outcome:
Analyze the internal/external factors affecting a business/organization to evaluate business opportunities.

How to Meet this Outcome

A small business/entrepreneurship senior project should focus on analyzing a business, business idea or how to improve an aspect of the business. This can be a broad plan for the whole organization. Or the project can be a more focused and in-depth effort to improve a particular area of the business. For example, a project might be a:

- Feasibility study: An effective feasibility study is a tool to determine if you should move forward with your idea, refine it, or scrap it altogether.
- New Business plan or Business Expansion analysis: The business plan serves as a tool that defines and explains your business' operations, its goals and its strategies.
- Analysis of a business problem: This type of project focuses upon an internal or external problem faced by the business to develop an improvement plan.

Elements that should be considered include (not an inclusive list):

- Financials: Evaluate historical sales revenues, profit margins of products and services, recent sales trends and cash flow. If a new business, look for trade association data that shows financial trends for similar companies and expected trends for the coming year.
- Sales: A thorough sales assessment provides insight into current sales and where improvements might be made. Certain geographic territories with low sales may not be underperforming, but are simply underserved, offering opportunities to grow the business.
- Marketing data: Analyze the industry and market targeted by the proposed venture. Measure the size of the market and its demographic makeup using census data or other survey sources. Define a target market segment according its behavioristic, geographic and psychographic characteristics. Analyze any competing businesses or projects that are planned or already at work in the market.
- Relationships: Key factors in a small business's success often include personnel, endorsements and relationships. Having official sponsor, supplier or partner status of a trade association or other organization can also boost sales.
- Opportunity Costs: Look at what entering a new business will cost in terms of lost revenue, personal time or sales.
- Operations: The operations portion of the business plan explains the business' operations in detail. This includes information on the business' location, hours of operation, furniture and equipment. It addresses the suppliers and vendors that the business. The operations portion also address specifics about maintaining the property, such as zoning compliance, utilities, taxes, building repairs and monthly property payments.

Previous senior projects have included:

- Development of a business plan to expand an outdoors outfitter business that included competitor analysis and marketing strategy.
- Creation of a new governance structure and operational framework for local non-profit organization (that included significant research into its history and ownership structure).
- Research, implementation and analysis of a new Point of Purchase system to improve operational and financial performance of business.

Marketing Subject Matter Expert Faculty:

- Mark Ahalt, Assistant Professor
- Sharon Beaudry, Assistant Professor

Technology & Management (BAS)

Program Outcomes:
Analyze leadership roles and styles. Apply knowledge of approaches to operational performance improvement.

How to Meet these Outcomes

Senior projects in this area should focus on incorporation of leadership/management concepts and how operational performance can be improved

Elements that should be considered include (not an inclusive list):

Analyze leadership roles and styles:

- Analyze organizational behavior as it relates to individuals, groups, and the organization.
- Recommend how to guide employee motivation, attitudes, and decisions in organizational settings.
- Analyze manager/leader effectiveness as related to organizational behavior.
- Assess the impacts of corporate culture and organizational change on organizational effectiveness.

Apply knowledge of approaches to operational performance improvement:

- Reducing procurement costs
- Optimizing production or distribution
- Optimizing after-sales service
- Reducing overhead costs
- Optimizing IT effectiveness
- Reducing product costs
- Improving efficiency

Previous senior projects have included:

- Implementation of a request for purchase process to select an improved IT security software.
- Retention analysis and improvement plan for a for-profit college.

BAS Subject Matter Expert Faculty:

- Maureen Sevigny, Professor
- Sharon Beaudry, Assistant Professor

Project Identification

One of your first challenges is to identify a project that will satisfy the requirements of senior project. Projects tend to fall into two general categories:

- **Improvement**: These projects focus on improving an aspect of the business. This can be a project utilizing a Six Sigma DMAIC approach (Define, Measure, Analyze, Improve and Control). Previous student projects have included improvements in inventory management, reduction in error rates, bottlenecks, wait times or employee turnover, improvements in efficiency and a customer service analysis. The overall goal is to increase revenue in terms of efficiency or reduction of waste.

- **Design**: This type of project focuses on the development of a specific business plan for the organization. This can include a marketing strategy, initial business or expansion plan, feasibility study, community redevelopment, patient outreach plan, employer branding initiative, request-for-purchase process, return-on-investment analysis, or employee training plan. The overall goal of these projects is to develop a custom designed plan tailored to the organization that can implemented.

- **Major Requirement:** Also remember that your project must meet the objectives within your major. See Specific Degree Outcomes by Major.

To Implement or Not to Implement?

Most students start senior project certain that they will implement their improvement or design plan. However, in the end, very few actually do implement. Students often do not have overall control over the implementation process within the business that may require senior level approval or funding. The organization may have competing priorities or different timelines. Also, implementing a plan within 20 weeks can be very challenging. The inability to implement your plan does not make it less valuable. In fact, many students have developed robust plans that are implement by the organization in the future. It is not unusual for the student to be hired by the organization to implement the plan.

If you choose to do a DMAIC plan, you will need to fully implement the process, which means that you will need access to the process to be able to measure, analyze, improve and control.

Access to Information & Sponsor Support

Regardless of whether your plan is implemented, all projects involve analyzing the business and some degree of data collection. This means that you do need to have access to the organization and your sponsor. Your project may also require having access to a certain amount of internal data, an ability to observe a process, or meet with employees. Therefore, it is imperative that you and your project sponsor have an open conversation about expectations. This will involve several meetings over the course of BUS495 as you develop your project charter and plan.

What makes a successful project?

- The student chooses a topic in an area in which they have passion.
- The project is challenging and enables the student to develop and show their knowledge.
- The scope of the project is narrow and realistic given the time and resources available.
- The selected project is not a significant priority for the sponsor and does not have a short timeline.
- There is excellent access to, communication with, and support of the project sponsor.
- The student keeps the project sponsor updated on project progress.
- The student keeps an open mind regarding solutions and takes the time to learn about various approaches.
- A well thought-out project and research plan is developed and followed that includes business concepts.
- When unplanned events arise (and they always do), the student quickly gets advice to redirect project.
- The student listens to the advice given by their instructor, faculty mentor and project sponsor, then act upon that advice.
- A significant amount of time is put into the project each and every week.
- The student brings their "A" game and treats this project like a job.

What are less successful projects?

- The student chooses a project out of convenience or because they perceive it will be easy.
- The scope of the project is too broad, lacks focus or overly ambitions. These students tend to spend the entire senior project year redefining their project rather than actually working on it.
- There is limited or no communication between sponsor and student.
- The selected project is a significant priority for the sponsor and needed to be done yesterday. This often leads to the sponsor finding a solution before the student completes their project.
- The project plan is not well planned and lacks overall direction. The student "wings it" rather than developing a plan that is based on concepts learned throughout their business education.
- The student immediately has a solution in mind before taking the time to learn about or conduct research about the problem.
- When unplanned events arise, the student ignores the situation.
- The student does not keep appointments, follow up with or listen to the advice of the instructor, faculty mentor or project sponsor.
- The student quickly finishes weekly assignments, or fails to keep up with the work and never keeps focus on the big project picture.
- The student does the minimum to get by not realizing that a successful project can launch a successful career.

Performance Criteria		High Proficiency	Proficiency	Developing Proficiency	Limited Proficiency
Project Objective **“Identification”**		The project is clearly described. Objective and purpose of the project is evident. Project scope is clear.	The project is described and includes most details, few revisions are needed. Objective and purpose of the project are stated. Project scope is realistic.	The project is described, however, may not include all details, minor revisions are needed. Objective and purpose of the project is unclear. Project scope is unclear.	The project is described, however, does not include all details, major revisions are needed. Objective and purpose of the project is missing. Project scope is not defined.
Organization Environment **“Context”**		The student clearly describes the project’s macro-environment. Relevant industry/company information is provided, i.e., background, industry characteristics, appraisal of the health of the organization, other pertinent information. Demonstrates good understanding of business concepts and skills related to the project.	The student adequately describes the project’s macro-environment. Adequate industry/ company information is provided, i.e., background, industry characteristics, appraisal of the health of the organization, other pertinent information. Demonstrates some understanding of business concepts and skills related to the project.	The student’s description of the project’s macro-environment is incomplete. Industry/company information, is incomplete, i.e., background, industry characteristics, appraisal of the health of the organization, other information. Demonstrates limited understanding of business concepts and skills related to the project.	The student does not describe the project’s macro-environment. Lacks industry/company information, i.e., background, industry characteristics, appraisal of the health of the organization, other information. Demonstrates no understanding of business concepts and skills related to the project.
Project Management “Process”	**Project Plan & timeline**	Project has a clear plan and timeline.	Project plan and timeline needs few revisions.	Project plan and timeline requires modification.	Project plan and time- line are incomplete and/or unrealistic.
	Literature Review	The literature review clearly addresses the proposed project’s objective and purpose.	The literature review adequately addresses the proposed project’s objective and purpose.	The literature review somewhat addresses the proposed project’s objective and purpose.	The literature review does not address the proposed project’s objective and purpose.
	Analysis	Analysis of findings is thorough and relevant. Findings are related to sound business concepts, financial practices, benchmarks, marketing practices, best practices, etc.	Analysis of findings is provided. Findings are related to sound business concepts.	Analysis of findings is limited. Findings are minimally related to sound business concepts.	Analysis of findings is incomplete. Findings are not related to sound business concepts.
		Discussion is evidence-based and appropriately references the analysis and lit. review. Student is able to draw conclusions by combining examples/facts/theories from one or more fields of study or perspective.	Discussion is some- what evidence-based, references analysis and lit. review. Student is able to draw conclusions, has limited ability to combine examples/facts/ theories from one or more fields of study or perspective.	Discussion is minimally evidence-based, does not reference analysis and/or lit. review appropriately. Student is unable to draw conclusions that combine examples/ facts/theories from one or more fields of study or perspective unless prompted.	Discussion is not evidence-based with little/no reference to analysis and/or lit. review. Student may present conclusions but is unable to combine examples/ facts/theories from one or more fields of study or perspective.
Project Completion **“The finish line”**	**Objectives Met**	The project meets the client’s expectations in functionality and timeliness.	The project mostly meets the client’s expectations in functionality and timeliness. Few revisions are needed.	The project needs revision before meeting the client’s expectations in functionality and timeliness.	The project does not meet the client’s expectations in functionality and timeliness.
	Summary & Conclusions	Summary, conclusions, and/or recommendations are specific. Supporting research is clear and relevant. Understanding of business concepts and skills is evident.	Summary, conclusions, and/or recommendations are provided. Supporting research is included. Some understanding of business concepts and skills is evident.	Summary, conclusions, and/or recommendations are incomplete. Little supporting research is provided. Understanding of business concepts and skills is limited.	Summary, conclusions, and/or recommendations are missing. Supporting research is not provided. Little/no understanding of business concepts and skills.
	Project Written Report	High-quality, well written project report with proper formatting, citations, referencing, grammar and mechanics. Is highly consistent in using professorial written formatting.	Quality written project report that mostly includes proper formatting, citations, referencing, grammar and mechanics. Is mostly consistent in using professorial written formatting.	Average written project report that sometimes includes proper formatting, citations, referencing, grammar and mechanics. Is not consistent in using professorial written formatting.	Low-quality written project report that does not includes proper formatting, citations, referencing, grammar and mechanics. Does not use professorial written formatting.
	Project Oral Communication	High-quality, well organized presentation that clearly informs the audience. Visuals are effective and oral communication is poised, timely and enthusiastic.	Quality, organized presentation that informs the audience. Visuals are effective and oral communication is mostly poised, timely and enthusiastic.	Average-quality presentation that may be lacking some organization or clarity for the audience. Visuals are somewhat effective and oral communication is somewhat effective but may be lacking poise, timeliness and enthusiasm.	Low-quality, unorganized presentation that does not clearly inform the audience. Visuals are not effective and oral communication lacks poise, timeliness and enthusiasm.

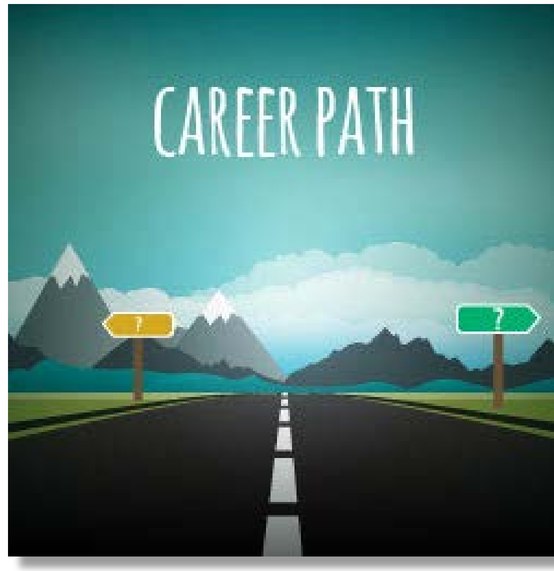
Specific Degree Outcomes	**Marketing** *Analyze an organization's activities to develop/implement a marketing strategy.*	Clearly analyzes the organizational needs to develops/implement a fully integrated marketing strategy.	Analyzes the organizational needs to develops/implement a somewhat integrated marketing strategy.	Somewhat analyzes the organizational needs to develops/implement a marketing strategy, however may lack full development.	Limited analysis of the organizational needs to develops/implement a marketing strategy, however lacks understanding or development.
	Small Business/ Entrepreneurship *Analyze the internal/external factors affecting a business/organization to evaluate business opportunities.*	Clearly analyzes the internal/external factors affecting the organizational to evaluate business opportunities.	Analyzes the internal/external factors affecting the organizational to evaluate business opportunities.	Somewhat analyzes the internal/external factors affecting the organizational to evaluate business opportunities, however may lack full development.	Limited analysis of the internal/external factors affecting the organizational to evaluate business opportunities, however lacks understanding or development.
	Operations *Demonstrate knowledge of fundamental concepts of operations management. (Examples: scheduling; forecasting, capacity, logistics, and materials planning; supply chain management; inventory control; Sales & Operations Planning (S&OP), etc.)*	Application of two or more fundamental concepts of operations management is central to the project. Strong objective evidence exists that the project correctly and appropriately applies the fundamental concepts of operations management chosen. The project's central thesis revolves around these fundamental concepts of operations management.	Application of one or more fundamental concepts of operations management is central to the project. Strong objective evidence exists that the project correctly and appropriately applies one or more of the fundamental concepts of operations management. The project has good connection with these fundamental concepts of operations management.	The project addresses one or more fundamental concepts of operations management, but is not central to the project. It is ambiguous or anecdotal as to whether the project correctly or appropriately applies one or more of the fundamental concepts of operations management. The project if only loosely connected to these fundamental concepts of operations management.	Little or no objective evidence that the project addresses any fundamental concepts of operations management. Little or no objective evidence that the project correctly or appropriately applies one or more of the fundamental concepts of operations management. The project is only loosely, or not, connected to these fundamental concepts of operations management.
	Heath Care Management *Interpret health policy and systems Assess the sustainability of Healthcare Organizations*	The student demonstrates clear understanding of health policy (i.e., Medicare, Insurance Reimbursement, Pharmaceutical Infrastructure, and R&D). Student is able to apply appropriate policies to their project. Evaluation of financial, operational, and environmental impacts is thorough and relevant. The student demonstrates accurate representation and understanding of financial impacts of the health care organization. Operations and infrastructure are clearly addressed (i.e., supply and demand and technology).	The student demonstrates understanding of health policy with some research and guidance. Student is able to apply policies to their project. Evaluation of financial, operational, and environmental impacts is included. The student might show mastery in 2 of the 3 areas.	The student demonstrates understanding of health policy with some research and guidance. Student is unable to apply policies to their project unless prompted. The student demonstrates understanding of how to define sustainability, however, is less able to apply the key areas of measurement (financial, operational, and environmental) in a health care organization.	The student lacks understanding of health policy and application. The student lacks understanding of sustainability theory and measurements. The student is unable to apply theory and/or measurements in a health care organization.
	BAS *Analyze leadership roles and styles. Apply knowledge of approaches to operational performance improvement.*	The student demonstrates clear understanding of leadership and organization roles as applied to the organization. Also an in depth approach to improve improvement was presented and analyzed using appropriate tools.	The student demonstrates understanding of leadership and organization roles as applied to the organization. Also an approach to improve improvement was presented and analyzed using appropriate tools.	The student demonstrates some understanding of leadership and organization roles as applied to the organization. Also an approach to improve improvement was presented but may lack full analysis.	The student lacks understanding of leadership and organization roles as applied to the organization. Also an approach to improve improvement was presented but was not analyzed or backed up with research.
Culminating Experience		The student adapts and applies, independently, skills, abilities, theories, or methodologies gained in one situation to new situations to solve problems or explore complex issues in original ways.	The student adapts and applies skills, abilities, theories, or methodologies gained in one situation to new situations to solve problems or explore issues.	The student uses skills, abilities, theories, or methodologies gained in one situation in a new situation to contribute to understanding of problems or issues.	The student adapts and applies, independently, skills, abilities, theories, or methodologies gained in one situation to new situations to solve problems or explore complex issues in original ways.

Oregon TECH

Project Sources

Project Sources

Your senior project is your opportunity to create a path for your future. Rather than just settling for the first project that lands on your door, you have the opportunity to create a project that will provide you with the experience you need to get hired into a field of your choice. For example, if your desire is to work in the sports retail field, then seek out a project in that field. A successful project in your field of choice can be added to your resume and give you a head start after graduation.



For those of you currently working in a field/company you love, is there a project in your company that could get you noticed (and promoted)? We have many, many examples of students paving a way into a field/industry of choice or getting promoted following a successful senior project. So this is your opportunity!

Networking

The best way to land a great senior project is to network. You may not think you have a network, but we all do. We have families, friends, as well as work and school colleagues. It is perfectly okay to tap into this network of people to explore senior project options. For example, let's say you would like your senior project to be in the area of marketing, and your parent's friend is a marketing executive. Ask your parents to provide you with an introduction to speak to this person- who knows where it might lead?

On the other hand, if you have an idea for a project, do not be afraid to try to find a contact in that company/industry. Recently one of our students was seeking a project in a particular health care organization. She called and emailed several people who always seemed too busy to get back with her. She then looked at some of the other staff positions (through a staff directory) and found a very receptive person who was very willing to work with her which lead to a great senior project.

Another piece of advice- do not just e-mail. Use multiple methods of communication. Just sending out a bunch of e-mails and waiting for responses will not get you very far.

Keep in mind one other thing, the people you contact may not have considered working with a student. They may not realize they have a project opportunity or may not realize your skills. However, most department managers and business owners have a list of projects that they can never get to. Do not be afraid to ask your contact if they have projects that they can not quite get to and would love someone to take it on. Most would WELCOME the opportunity. They have nothing to lose and everything to gain.

Project Source Ideas

The following are some ideas for project sources:

- **Your Passions and Career Goals**: Your main inspiration for finding a senior project should focus on your passions and career goals. For example, if you want to work in a certain field after graduation, now is the time to gain some experience. It is also important to remember that you will be working on this project for a year. The students who seek out projects that inspire them often have more successful projects.

- **Dream Job/ Company**: With a bit of planning and a head start, seeking a project (or internship) in the company of your dreams is not out of reach. Start by reaching out to your network (faculty, Career Services, family) to see if anyone has a connection to this company. Career Services can help you tap into the Oregon Tech alumni network. While this is challenging to manage, it can happen with careful planning and help from your network.

- **Business Management Faculty**: Talk to your faculty in the Business Management department. Not only do they have many industry contacts, but they also have lots of ideas for potential projects.

- **Other Faculty, Coaches and Administration**: Some of the best projects often comes from people outside of the Business Management department. These people have projects that they can not get to and would love to have some business expertise to take it on.

- **Expansion of Previous Projects**: In classes such as Marketing, Service Management, Entrepreneurship and Heath Care Management you may have worked on projects for an organization. You may have developed the beginning of a project in your Technical Writing class. These projects are often great sources for your senior project. One previous student, who grew up on a wine vineyard, developed her tech report on viticulture (study of grapes) and then went on to find a sponsor interested in developing their own wine label. For her senior project she developed a business plan to begin a wine label for this company. After graduation they hired her to put her plan into action.

- **Partner with other Departments/Majors**: Many of the students from other majors are often building technologies for their senior projects. Many also have visions of taking this product to market but have few business skills to do so. This is a great opportunity to partner with other students and focus on the business development aspect of their project. The **Catalize Klamath** competition is also a source for these partnerships. Judges have been very outspoken regarding the need for these teams to have business plans in place.

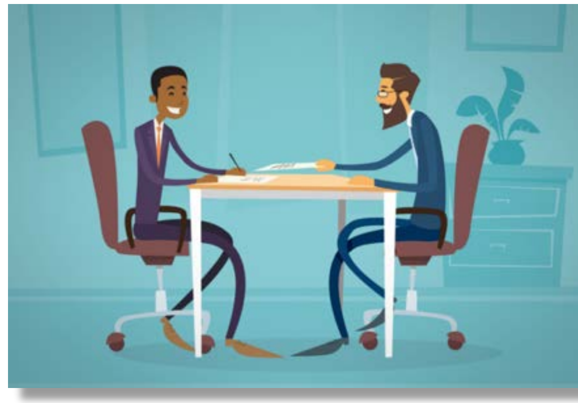
- **Your Job**: Another great place to find a project is at your current workplace. Having a conversation with your supervisor can be very fruitful. Let them know what you are studying and the type of things you have learned. This conversation might lead to the perfect project. We have had many projects start this way and after graduation the student is hired on fulltime or promoted.

- **Non-Profits or Community Projects:** Since non-profit and community organizations have limited resources they are often grateful for business expertise and help with projects. Consider your local community and religious organizations. These projects tend to make a rather large impact.

- **Bulleting Board**: Check out the Bulletin Board in the Business Management Department in Klamath Falls. There you can find current projects looking for a student. Also on the **Bulleting Board** are resources and weekly updates from the career center such as internships. If you are not located in Klamath falls reach out to Sharon Beaudry.

- **Business Resources:** Your town's Small Business Development Center or Chamber of Commerce are great sources for projects. This is where business owners and entrepreneurs come together to seek help and share ideas. Many of these people need business expertise to further develop their business. The professionals who run these organizations tend to know nearly every business owner in their local area. For example, it is not uncommon to hear of a local business that would like a marketing plan that develops their social medial presence. The following are a few resources. Look in your local community for additional organizations. You will also find these great resources for your research!

Resource	Website
America's Small Business Development Center	http://americassbdc.org
America's Small Business Development Center-Oregon	http://www.bizcenter.org
US Chamber of Commerce	https://www.uschamber.com
Klamath County Chamber of Commerce	http://klamath.org
Wilsonville Area Chamber of Commerce	http://www.wilsonvillechamber.com
US Economic Development Administration	https://www.eda.gov/resources/
Klamath Falls Economic Development	http://www.scoedd.org
Wilsonville Economic Development	http://www.wilsonvilleecdev.com



Initial Conversations

The following are some pointers to start your initial conversations with a project sponsor or network source:

Setting a Meeting

- Explain you are a business student. Ask the contact if you can take a few minute of their time to learn more about their business and discuss your senior project.
- Whenever possible, set up an initial **IN-PERSON** meeting. Since these people are busy, let them know you will not take too much of their time.
- Utilize e-mail and the phone as appropriate. Remember that ALL correspondence must be professional. (See professional e-mail etiquette section.)

Prior to the Meeting

- Make sure that you have done background research on the organization, and the issues facing their industry. Also dress appropriately for the meeting.

Making a Connection

- Introduce yourself to the potential sponsor. Provide some information about your background, education and the general project requirements.
- Ask the potential sponsor about their needs. One of our faculty suggest that students ask, "What keeps you up at night?" Remember, ALL managers have projects that they can never quite get to. The goal is to see if their projects might be a good fit for you. If this person does not have a perfect project, ask them if they know someone else who might (network!). Ask them to provide an introduction.

Potential Project Fit

- If there seems to be a good fit, obtain background information from the sponsor about the problem. Let them know that it will take several weeks for you to get your project plan developed and approved. You will likely need to set up one or more additional meetings or e-mail exchanges during this period.
- Limit your project scope to something that can be manageable within the 9-month time frame. Don't over promise.
- Let them know that part of your requirement will be to provide an overview of the company which will require some interaction with the company sponsor or others. Also, if the project requires access to company information or time with your sponsor, be sure that you work towards something that will be workable for both of you.
- Sometimes sponsors will require a confidentiality agreement to be signed by the student. Also, they may ask that the name of the company not be revealed in the project report. Touch base with your instructor for the best way to do this.

Thank You Notes & Follow Up

- Be sure to send a thank you note (e-mail is fine).
- If follow up is discussed, be sure to do so in a timely and professional fashion.

Oregon TECH

Project Charter

Project Charter

In order to clearly identify your project plan, research methods and approach, you will develop a project charter in the first senior project class - BUS495. This charter serves several purposes:

- It will clearly identify and communicates your project components to your stakeholders including:
    - Project Problem and Objectives
    - Project Deliverables
    - Research Methods
    - Evaluation Methods
- It also provides you with a roadmap on how to proceed with your project in the following terms.

The components of your project charter will include the following sections. These sections make up the first section of your final project report. **The charter should be well written using professional business writing – which means <u>direct and concise</u>**. (See Writing section for guidance.) While it may be edited throughout, the project charter will be due at the end of BUS495. This charter will be shared with your sponsor and faculty mentor.

Project Problem & Business Case

In this section, you will describe your project in terms of a problem facing an organization. You will need to start by providing a brief description of the organization to give the reader context. This section should include an overview of the problem and how it effects the business. Clearly describe the compelling business case for the project.

Example Problem Statements

Premium coffeehouse business has been hindered during the economic downturn the past few years. Some have maintained steady business and even slight growth, while others such as Starbucks has recently closed stores and downsized 12% *(Madison, 2009)*. Concurrent with this phenomenon has been the introduction of premium coffee at fast food chains *(Tyler & Rosenburg, 2007)*, prevalence or lack of alternative distribution lines *(James 2009)*, and overextension in multiple stores *(Jiao, 2009)* . Research in these areas will help identify key reasons for this difference in premium coffeehouse profitability and aid in avoiding further losses.

Since the advent of delivery services offered through corporations like FedEx and United Parcel Service, the U.S. Postal Service has been losing market share, 5% year over year, to these and other entities. This results in depot closures, eroding customer confidence, and loss of revenue contributing negative cash flows year over year.
Particular attention to load rates have helped private corporations remain competitive (*Spillman, 2009*). Additionally, deliverers have outsourced as part of their cost strategy (*MacMillan, 2003*). A selective delivery strategy with superior marketing are considered hallmarks of successful Business-to-Consumer logistics model (*Newton, 2001*). This research identifies potential contributors to the USPS's loss of revenue and makes recommendations to address the problem.

Project Objectives

The project objective section should include the overarching goals of the project along with a project mission statement (such as benefits of the project, and how it is aligned with the sponsor's strategic plan).

Overview

This section should include several sections to provide the reader with a more detailed description of the project description including:

- **Project Description**: Describe a project.
- **Assumptions**: Assumptions are circumstances and events that need to occur for the project to be successful, but are outside the total control of the project manager. Constraints are things that might restrict, limit, or regulate the project.
- **Scope:** Provide a statement that clearly defines what is and is not included in the project.
- **Resource Requirements:** If there are any specific resources needed for the project, include this section. If there are no resource requirements beyond your typical student tools such as a computer etc. leave this section out of your charter.
- **Deliverables**: Describe a tangible or intangible product or service produced as a result of the project that will be delivered to the sponsor.

Milestones/Timeline

Identify the project timeline and milestones (events that mark significant progress). You should plan to create this in a Gantt chart. See MS Project instructions.

Project Stakeholders

Identify the key stakeholders of the project, which should include your project sponsors and faculty mentor, among others.

Risk Management

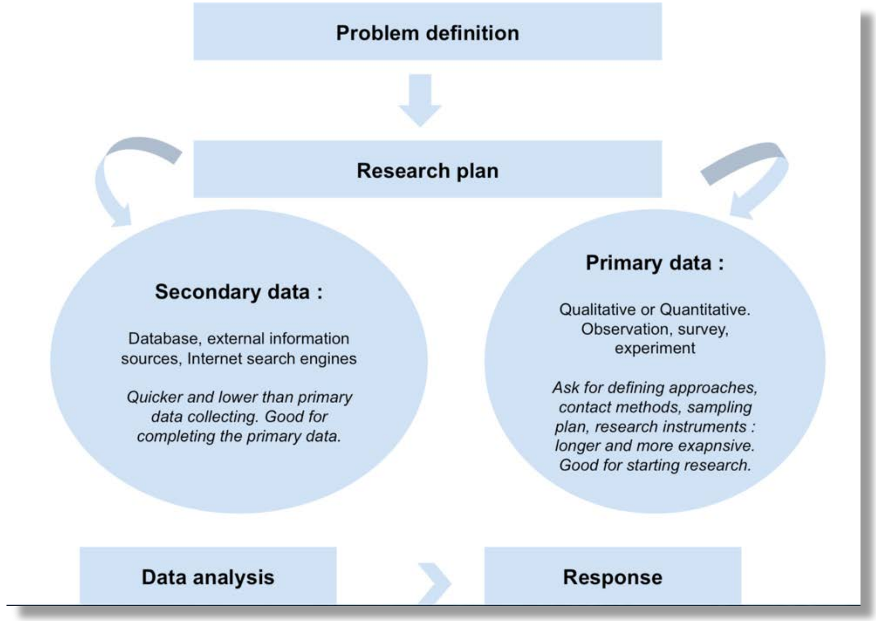
Here is where you will list likely potential problems that may impact the success of your plan.

Project Research Approach

Provide an overview of how you intend to research or approach this project. **This section is critical to the success of your project since it lays out how you will continue with the project**. Start this by developing a simple research goal statement that includes - what and why. This will be further developed after you have some initial conversations with your sponsor, instructor and faculty mentor, conduct initial research on the topic, and complete your annotative bibliography. Once that is done, and need to develop an approach that will include secondary research and will likely include primary research and data collection. For example, if your project goal is to develop a marketing strategy, you will likely need to do some analysis of the industry, analyze current customer data for trends, and conduct primary research through stakeholder interviews, a customer survey or focus group. By laying this out now, you have developed the framework for your data collection phase of your project.

Evaluation & Analysis Method

Once you determine your project research approach, then describe how you will evaluate and analyze this data. How will you compile the data you collected? What business methods and tools will you use? What specific techniques will you be using? Go back and review your notes from your past classes and discuss various methods with your instructor and faculty mentors. This will help you determine your evaluation and analysis methods. Again, if this is planned out well, you will have a framework for your analysis phase of your project.



Project Success Factors

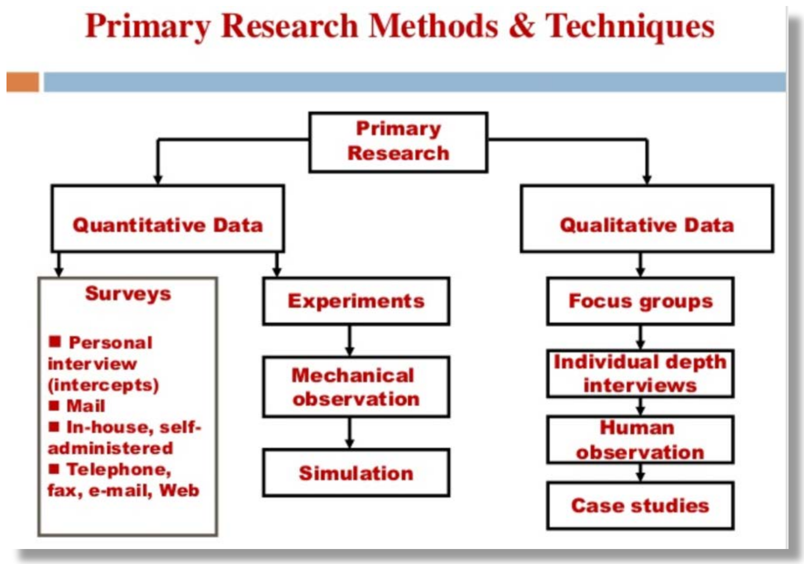
Describe how the success of the project will be determined from the customer's perspective. The completion criteria should be in quantifiable/measurable terms so that there is no doubt as to the project's success. If the business objectives have been sufficiently quantified, meeting them constitutes the successful completion criteria. Quantifiable measures of customer use and/or satisfaction with the final product also measure the successful completion of the project.

Oregon TECH

Research & Data Collection

Research & Data Collection

Throughout the course of your project you will be conducting research to support your project methods and conclusions. Data collection is a term used to describe a process of preparing and collecting data. It involved systematic gathering of data for a particular purpose from various source, that has been systematically observed, recorded and organized. This data will be the basis for making decisions and recommendation for your project.



There are two types of data you will likely collect:

- **Primary research** (also called **field research**) involves the collection of data that does not already exist, meaning research activity to collect original data. Primary research is often undertaken after the researcher has gained some insight into the issue by collecting secondary data. Examples of primary research include:

  Qualitative research (Non-numerical, tells why, when and how)
    - Interviews
    - focus groups
    - ethnographies
    - participant observations

  Quantitative research (numerical, statistically reliable)
    - controlled laboratory experiments
    - field work
    - questionnaires and surveys

Rizwan, A & Parab, S (2013) Data collection primary & secondary. Retrieved from http://www.slideshare.net/parabprathamesh/primary-sec

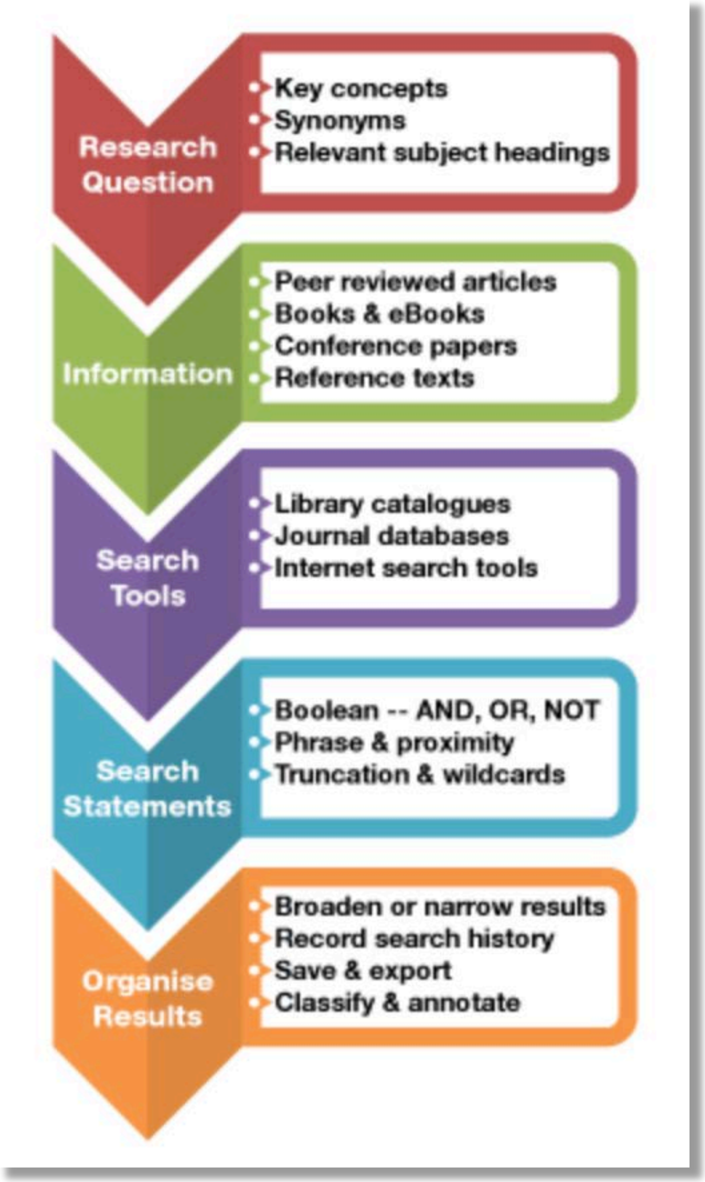
- **Secondary research** is defined as an analysis and interpretation of primary research. The method of writing secondary research is to collect primary research that is relevant to a writing topic and interpret what the primary research found. For instance, secondary research often takes the form of the results from two or more primary research articles and explains what the two separate findings are telling us. Secondary research may include:

  External Sources
  - Journals
  - Books
  - Magazines
  - Newspaper
  - Library Databases
  - Industry Databases or Reports
  - Census Data

  Internal Sources (collected by the company or organization)
  - Sales Records
  - Marketing Activity
  - Cost Information
  - Distributor reports and feedback
  - Customer feedback

Searching for Resources

Developing a list of key terms related to your project problem is one of the best ways to get started with your secondary research. From there you may need to broaden or narrow your search based on the results. Sometimes you may not be able to find information on a topic because you have narrowed your search to a very specific field. However, you may find great resources in a related or broader field or industry. The librarians are always available to work with you.



Credible Sources

Since you are relying on someone else's primary research it is important to be selective about your sources. Peer reviewed academic articles are always best, but credibility can also come from sources such as *The New York Times* or *The Wall Street Journal*. Also government databases and some websites (.gov or .edu are best) are good sources for information. When evaluating a sources consider:

- Authority (what are the credentials of who authored the source?)
- Accuracy (Is the data presented based on factual data referencing their source?)
- Objectivity (Is the source opinion or fact based?)
- Currency (Was it fairly recently written?)

While sources such as Wikipedia are not considered credible, the list of resources at the bottom of a Wikipedia page are often great places to lead to the credible sources. However, blogs or opinion-based webpages are not credible.

Also be careful of company websites since their primary purpose is to promote the company, therefore they can lack objectivity. Seek out other sources to support company information such as personal interviews or articles.

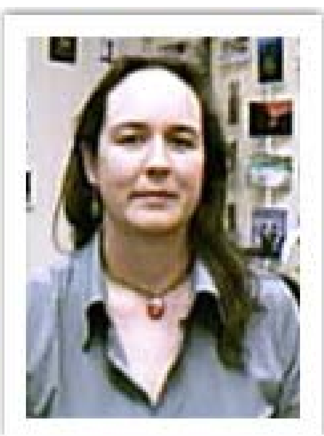
Librarians

The Oregon Tech Librarians play a large role in a successful senior project. They have expertise in a number of important areas that are key to your project's progress such as:

- Guiding you in determining appropriate research sources for your project
- Development of key words to find the best sources
- APA citation
- Annotative Bibliography and Literary Review development
- Business Expertise
- Overall guidance and project support

Please reach out to them early and often! You can contact them at:

Aja Bettencourt-McCarthy
Instruction Coordinator
Oregon Institute of Technology Library
Email: aja.bettencourtmccarthy@oit.edu
Office: LRC219D
Phone: 541-885-1767



Dawn LoweWincentsen
Wilsonville Campus Librarian
Oregon Institute of Technology Library
Email: dawn.lowewincentsen@oit.edu
Office: Wilsonville Library
Phone: 503-821-1258

Note: Special thanks to Aja Bettencourt-McCarthy for providing the resources for this section of your guide including library resources, local resources, annotative bibliography and literary review.

Library Resources

The Oregon Tech Library resources are great places to begin your business research. This is a link to the Library's webpage that is specifically designed to help business students research their project topics. This is the perfect place to start your secondary research. A list of the specific business related databases are listed below.
http://www.oit.edu/libraries/find/articles/subject/business-companies-industrial-management

http://library.oit.edu/sp/subjects/guide.php?subject=mgt

Business Databases

Business Source Complete
Provides full text for more than 1,100 journals covering business, management, economics, finance, banking, accounting, healthcare management and much more. Try the Business Searching Interface that has been specifically designed to enable Business Source Premier users to take advantage of its divers database content.

First Research
Provides hundreds of industry profiles, covering over 1000 industry segments. Some international industry information. Continuously updated. A division of Hoover's Inc.

Mergent Intellect
Search for information on companies, industries, people, jobs, demographics. Databases on private & public businesses, employers, North American residents, industry segments, business executive biographies.

LexisNexis Academic
Provides full-text access to a wide range of news, business, legal, medical, and reference information. For articles in magazines and journals, select "News" from the main menu. Then select "General News" and "Magazines and Journals." For company profiles and financial data, choose "Business," and then click on the desired categories under "Company Information." The Business section also provides full-text company news and financial information, including SEC filings, a trade show directory, and company comparisons.

Business Economics and Theory
More than 150 full-text journals. Has a strong emphasis on titles covered in the EconLit database. Provides journals and magazines focusing on topics in economics.

Business Insights: Global
International business and global economies. Case studies, profiles including SWOT reports, company histories, scholarly journals, and business news.

Directory of Corporate Affiliations
Provides corporate linkage information on more than 170,000 of the most prominent parent companies and their affiliates, subsidiaries and divisions, down to the seventh level of corporate linkage. The database includes major public and private businesses in the United States and throughout the world.

General Business File ASAP
Has full text and images. Analyze company performance and activity, industry events and trends as well as the latest in management, economics and politics. Access to a combination of broker research reports, trade publications, newspapers, journals and company directory listings.

PubMed
Anyone can access this free resource that is developed and maintained by the National Library of Medicine. Includes access to MEDLINE. May be helpful for healthcare management students.

Regional Business News
Provides comprehensive full-text coverage for regional business publications including 75 business journals, newspapers, and newswires from all metropolitan and rural areas within the United States. Updated daily.

ReSOURCE: AICPA's Professional Standards Literature
This is an electronic version of the print title: AICPA Professional Standards. This database is for in-library use only, and can be accessed through the desktop icons on the library computers. Updated four times a year.

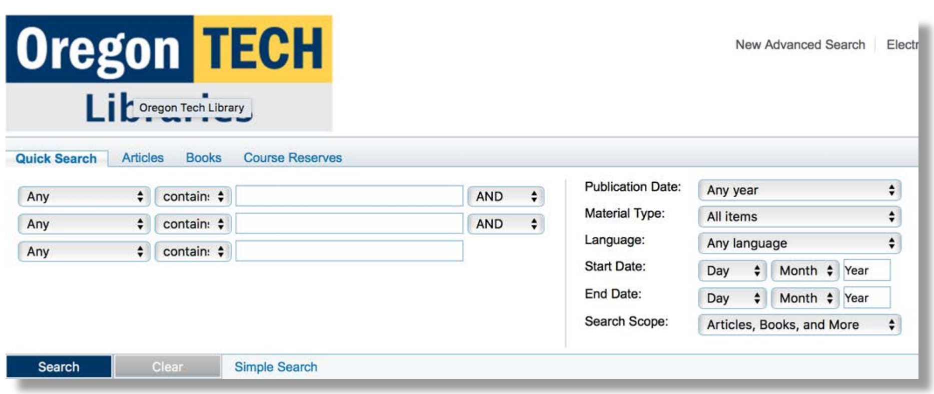
Sage Journals Online
The SAGE Full-Text Collections are award-winning, discipline-specific research databases of the most popular peer-reviewed journals in Communication Studies, Criminology, Education, Health Sciences, Management & Organization Studies, Materials Science, Political Science, Psychology, Sociology, and Urban Studies & Planning published by SAGE Publications and participating societies. These comprehensive databases include more than 246 journals, 240,000 articles, book reviews, and editorials, with all the original graphics, tables, and page numbers.

Small Business Resource Center
Comprehensive database incorporating journals, reference books, and links to online material. Content includes sample business plans and information for starting and operating a business – such as accounting, finance, human resources, marketing, management, taxes, etc.

Statistical Abstracts
A comprehensive summary of statistics on the social, political, and economic organization of the United States. Use the Abstract as a convenient place to find statistics, and as a guide to sources of more information both in print and on the Web.

Wall Street Journal Contains full text of the Wall Street Journal, a national weekday business newspaper, from 1984 to the present.

Prior Business Management Senior Projects You may access a selection of previous senior projects that have been institutionally published in the Oregon Tech library. Find projects at http://digitallib.oit.edu/cdm/landingpage/collection/sprojects .

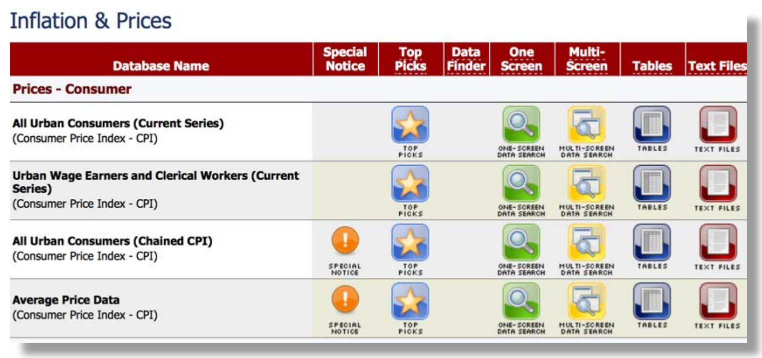


Other Business Sources

eMarketer A wide range of marketing research
https://www.emarketer.com/corporate/coverage#/

United States Census
http://census.gov

Bureau of Labor Statistics
http://www.bls.gov



Local and Oregon Sources
The following is not meant to be an exhaustive list of resources. Most communities and states have a wide array of web-based resources to support businesses that may be helpful for your project.

Healthy Klamath Healthy Klamath is an up-to-date source of population health and socio-economic data, providing resources for community assessment, strategic planning, collaboration and advocacy. http://www.healthyklamath.org/index.php

Klamath Falls Small Business Development Center The local SBDC has a wide range of resources to support small businesses. You may also wish to reach out to the center's director Kathryn Rutledge who is always happy to meet with our students – sbdc@klamathcc.edu
http://www.bizcenter.org/locations/klamath-falls/klamath-falls-resources

Klamath County Chamber of Commerce The Chamber supports local businesses with a variety of programs. http://klamath.org

Meet me in Klamath This is the website of Discover Klamath. http://www.meetmeinklamath.com

Oregon Blue Book This directory compiles resources related to Oregon. It covers topics from agriculture, business and labor to history and tourism.
http://www.sos.state.or.us/bbook/topic/topichome.htm

Wilsonville Chamber of Commerce The Chamber support local business with a variety of programs http://www.wilsonvillechamber.com

Wilsonville Economic Development This site has key statistics and resources regarding the Wilsonville economy http://www.wilsonvilleecdev.com

Search Tools for Business Topics

Based on the list above, the following are suggested sources based on the type of project you may be conducting.

- **Value Propositions**: LexisNexis Academic, Business Source Complete, Mergent FirstResearch, Mergent Intellect, Oregon Tech Library Company Information Subject Guide.

- **Customer Relationships**: Business Source Complete, Klamath Small Business Development Center, Klamath Country Chamber of Commerce

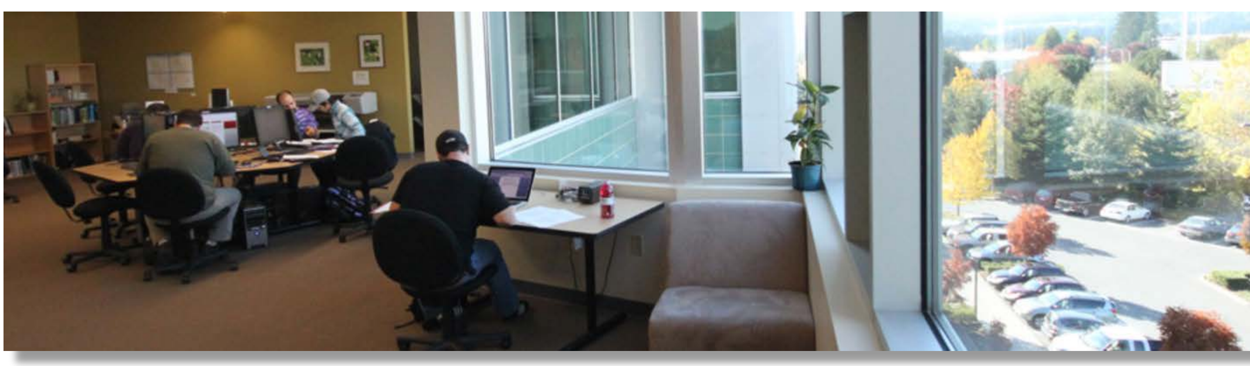
- **Customer Segments**: Mergent Intellect>Demographics, Statistical Abstracts, United States Census, Heathy Klamath, Oregon Tech Library Statistics Subject Guide

- **Business Channels**: Meet me in Klamath, Business Source Complete, eMarketer

- **Cost Structure**: Mergent Intellect, Small Business Resource Center, Mergent First Research

- **Revenue Streams**: Mergent Intellect, Statistical Abstracts, Mergent First Research

- **Industry Research**: Mergent Intellect



Annotated Bibliography

In the course of developing your project charter during BUS495, you will be conducting initial research on your project topic in the form of an annotated bibliography. The goals of this include:

- Uncovering the research that has been conducted on this topic.
- Understanding how this topic has been researched in the past in order to determine your research methods.
- An initial basis for developing the literary review for your project (written in BUS496).

What is a bibliography?

A bibliography is an alphabetized list of information sources (books, journals, websites, etc.), used while researching a topic. It is often located at the end of the work. Sources are usually arranged alphabetically by author and are followed by a bibliographic citation (author, title, publisher, etc.).

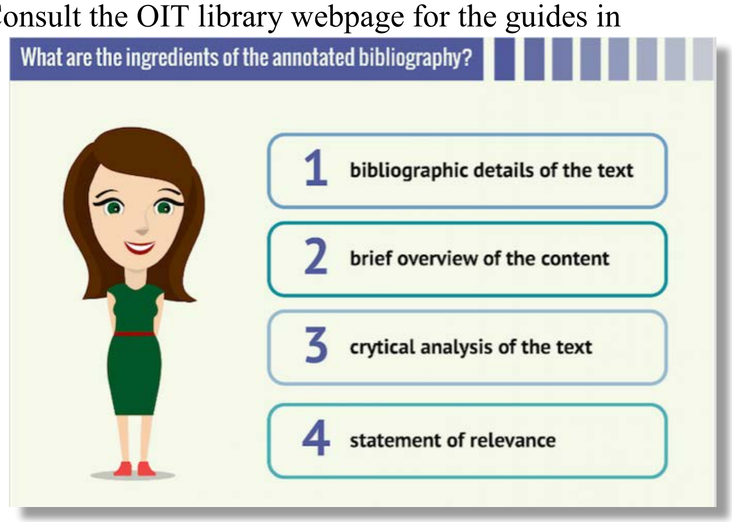
What is an annotated bibliography?

In addition to a bibliographic citation, each source in an annotated bibliography is followed by an annotation – a brief (4-6 sentences) descriptive or evaluative paragraph.

The process of writing an annotated bibliography

Writing an annotated bibliography requires a variety of intellectual skills: ability to present arguments in a concise way and persuade the reader, critical thinking, and effective library research.
Follow these steps to create an annotated bibliography:

- Do a preliminary research to find and record citations to books, periodicals, websites, etc. that may contain useful information and ideas on your topic.
- Always give preference to sources that offer a variety of perspectives on a subject.
- Cite each source used in your paper. Consult the OIT library webpage for the guides in citation styles. Use the style recommended by your instructor.
- Now you are ready to write annotations for each of your sources.



What does an annotation consist of?

Depending on your assignment, annotation of each source may consist of all or part of the following:

- describe the content of the source
- describe the usefulness of the source

- discuss any limitations the source may have (grade level, timeliness, etc.)
- describe the intended audience
- evaluate the methods/research used
- evaluate the reliability of the source
- discuss the author’s background
- discuss any conclusions the author(s) may have made
- compare this source with another you have cited
- describe your opinion of the source

What is the purpose of an annotated bibliography?

Depending on your assignment, an annotated bibliography may serve a number of purposes:

- a review of the literature on a particular subject
- illustration of the quality of your research
- examples of the types of sources available
- description of other sources on a topic that may be of interest to the reader
- exploration of the subject for further research

Adapted in part from University of Minnesota, Crookston Library, and Cornell University Library

Last updated 05/11

Sample Annotative Bibliography

Writing Center

Annotated Bibliography

Sources are cited according to APA guidelines.

Barlett, C.J & Rodaheffer, C. (2009). Effects or realism on extended violent and nonviolent video game play on aggressive thoughts, feelings, and physiological arousal. *Aggressive Behavior*, *35*(3), 213-224. doi: 10.1002/ab.20279.

Annotations are indented half an inch (.5”).

The authors—both psychologists—assert that repeated play of violent video games increases aggressive thoughts and feelings in players. In a laboratory setting the researchers compared subjects playing nonviolent games with those playing violent games, and they found greater aggression in the latter group following play. This finding, they contend, suggests at least the possibility that violent video game may have a causal relationship with real-life violence.

The first paragraph of the annotation summarizes the text.

This resource will be used as evidence to support my claim that video games increase violent tendencies in its players.

The second paragraph explains how this resource is relevant to the paper or project.

Taken from Ashford University Writing Center

Refrain from Copying your Summary Directly from the Resource

Summarize in Your Own Words

Literary Review

In the course writing your project report, you will be writing a literary review on your topic. The literary review provides the reader with a background on your topic based on how others have researched this same problem. In other words, the goal is to provide a framework for your work by summarizing what other researchers and business professionals have learned.

A Literary Review is NOT
research directly about your project,
nor is it primary research.

Rather it answers the question-
How have others solved a similar problem?

Foundation: the literature review is the foundation for your paper

- What has already been studied?
- What needs more attention/where are there opportunities to add to the field?
- Who is in the conversation?
- What tone/vocabulary is used by this community?
- What are the key sources of information in this community?
- What research methods have been used?

Key questions:

- What are the major issues/debates about this topic?
- What are the origins/definitions of this topic?
- What are the main questions and problems that have been addressed to date?
- How have the approaches to these questions increased our understanding and knowledge?

Key points of a literature review:

- What does the research say about my topic?
- What type of methodology was used?
- What is missing (and how might your project fill this gap)?

Writing your Literary Review

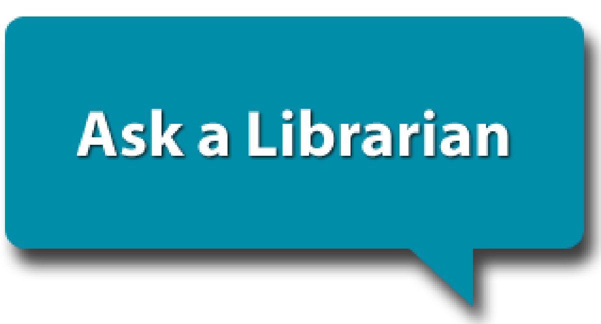
- No title page or abstract needed
- Start with an introduction that provides an overview on the topic(s)
- Integrate your business knowledge in to review
- Do not write a paragraph for every article. The research should be "grouped" by topic or theme. In the sample you will notice the author noted THREE articles at once because they all took the same approach.
- A preferred APA method often uses – "According to Smith (2014).."
- In-text citations should be placed at the end of each sentence where new information is being paraphrased – not just at the end of the paragraph.
- Include a summary conclusion about the literature discussed at the end.
- Reference list should be formatted in APA style and only include CREDIBLE sources.

What makes a good literature review?

- Clearly delimits the subject matter to be reviewed.
- Covers all important and relevant literature.
- Provides an insightful analysis of the ideas and conclusions in the literature.
- Points out similarities and differences, strengths and weaknesses in the literature. And identifies gaps in the literature for future research.
- Identifies the context for which the literature is important.

More Literary Review Help

- This video (https://library.sjsu.edu/video/writing-literature-review-section) from the San Jose State University Library gives a good, short overview of how to write your literature review section.
- For more information, the Writing Center at the University of North Carolina has put together a detailed page (http://writingcenter.unc.edu/handouts/literature-reviews/) about Literature Reviews
- Finally, the best way to learn more about the purpose and formatting of literature reviews is to read them. Contact a librarian for help finding examples of literature reviews in your field.



SAMPLE LITERARY REVIEW

Retrieved from http://ivythesis.typepad.com/term_paper_topics/examples-of-literature-reviews/

The purpose of the lit review is to review what others have done to solve a similar problem. If you problem's scope is very narrow this might mean you have to broaden your research to find related research. Even if you have decided to take a particular approach (i.e. 6 sigma)- research other possible solutions.

Literature Review: Marketing Strategies for Different Market Segments in UK

Start with an introduction that provides an overview

Notice how this lit. review integrates their business knowledge. For example, in this sample they are including business strategy and marketing theories throughout the discussion.

This is written in perfect APA format. Font is Times New Roman 12 pt. Paragraphs are indented. Double spaced. No extra space between paragraphs.

Business organizations are constantly seeking ways to enhance their performances in order to compete actively and aggressively in the market. Profit-seeking organizations have long recognized the importance of creating value in the products and services they offer to the customers all in the common objective to deliver commercial goods efficiently in order to increase the satisfaction of the existing customer-base. Aside from inculcating loyalty among the members of the clients and customers of a business organization, companies are likewise aware of the need to widen and extend the reach of the company's products and services to new markets in order to increase its share on clients and customers. Strategies, plans and techniques in the areas of operations, communication and marketing, sales, supply chin, logistics, research and development, performance measurements as well as social and corporate obligations and responsibility are continuously improved all for the benefit of the target market. Once companies become successful in these organizational and managerial areas, sustained economic development is envisioned. This paper aims to present a discussion that illustrates arguments and debates regarding the importance of the concept of "market-oriented" companies in the current business environment. Existing literatures are reviewed regarding the organizational and managerial characteristics of market-oriented companies along with illustration using a sample company that exhibits the traits and attitude of being a market-oriented business organization.

A number of existing literatures indicate the importance of being a market-oriented in the business environment among profit-seeking organizations (Jaworski &

Notice how the in-text citations are included after each sentence- not just at the end of the paragraph. Also notice that they are often using ACCORDING TO…

Kohli, 1993). These arguments are along with the claims of other experts regarding the limitations of being market-oriented since competing business organizations are likewise implementing market-oriented practices. According to DeGeus (1988), Dickson (1992) and Slater & Narver (1995) aside from having the market orientation needed in the business environment, companies should be able to imbibe faster-learning approaches relative to that of their competitors in order to ensure the success of their organization. Business scholars continue to engage in debates regarding the important managerial as well as organizational characteristics that contemporary companies should exhibit to guarantee success.

Notice how the research is “grouped” by theme/topic. Notice they group these three articles because they have the same approaches/findings. They DO NOT write a paragraph on each article- which is the WRONG WAY to do a lit. review.

According to Lukas, Hult & Ferrell (1996) organizational learning will ensure the future success of business organizations contrary to traditional inclination and view towards the business organizations’ existing resources such as labor and capital as the primary means of achieving the performance goals and objectives of companies within the business industry. Others emphasized that information and knowledge are the main features of economic success (Bell, 1973). From these arguments and claims it could be assumed that being market-oriented leads to competitiveness in the business arena and that companies should be market-oriented in order to succeed (Day, 1994). As such, change is encouraged among business organizations for further development highlighting the relationship between being market-oriented and devising means to increase company performances. Moreover, the arguments further indicate that being market-oriented is only a start in initiating and ensuring success in the business environment (Slater & Narver, 1995).

Competitive advantage encourages business firms to invest on researches that will define their target customer groups that they believed they could serve best. Every business person is determined to know what kind of work they would and would not do for their customers and, in turn, they carefully learn how to fulfill the needs of each kind of customer in their target markets. Hessan & Whitely (1996) emphasized the idea to take advantage of the competitive situation not just by being better in how that product gets sold, serviced, and marketed at the customer interface. It requires that companies create breakthroughs in how they interact with customers, and design a way of interacting that makes an indelible impression on customers, one that so utterly distinguishes them from others that it becomes a brand in itself.

Organizations that capitalize on customers' active participation in organizational activities can gain competitive advantage through greater sales volume, enhanced operating efficiencies, positive word-of-mouth publicity, reduced marketing expenses, and enhanced customer loyalty (Lovelock & Young, 1979 and Reichheld & Sasser, 1990). Rather than going after every potential source of revenue, companies eliminate useless assets that do not add value for customers' satisfaction. Business organizations implement bureaucratic policies and procedures for the benefit of the staff, customers and the company in general. According to Bowers, Martin & Luker (1990), if consumers somehow become better customers -- that is, more knowledgeable, participative, or productive -- the quality of the service experience will likely be enhanced for the customer and the organization.

Companies employ detailed business plans and strategies in order to gain several benefits from its competitors such as increased profits and enhanced customer relations as company objectives. Gaining customer loyalty is a corporate challenge today in this increasingly competitive and crowded marketplace because of the eventual profitability it will provide. The changing business world allowed customers to change as well. Company management had shifted their focus on their clients or customers so as to stay successfully in business with the need to completely reformulate their conventional business aims and purposes from being process-focused to customer-centered. With the advent of technological innovations, logistical decisions about delivery operations, stockholding, warehousing and economies of scale get more complex solutions in today's business environment.

Include a summary conclusion about the literature discussed

Indeed, making a business successful in a particular setting demands crucial and detailed studies and examination of the factors that will generate the best results that will serve the aims and objectives of the company. In this light, owners of big business organizations operating in a competitive business environment should be in constant look out with its competitors and the overall status and events in the industry. Taking advantage of the opportunities and intensifying the strengths while minimizing the risks and weaknesses of a business firm greatly helps in predicting the success in business Examination on the business strategies and plans in order to answer to the demands of clients and customers through efficient delivery of such needs will not only increase the profit of an organization but will likewise gain the trust and competence of the clients and customers. Efficient management of delivery options in a particular company and looking into the problems encountered in operating the business may enhance the likelihood of a business corporation to attain its goals as enterprising organization.

SAMPLE LITERARY REVIEW

Retrieved from http://ivythesis.typepad.com/term_paper_topics/examples-of-literature-reviews/

Also notice that the references used are credible sources (the kind found through the library databases). So be very careful using a google search- as they may not result in a CREDIBLE REFERENCE- a must have for a lit review.

References are double spaced, hanging format and correctly formatted according to APA. Notice no there are no hyperlinks. See OWL APA website for guidance.

References

Bell, D. (1973). *The coming of post-industrial society*. Basic Books, New York, N.Y.

Bowers, M.R., Martin, C.L. & Luker, A. (1990). Trading places: Employees as customers, customers as employees. *Journal of Services Marketing*, 4 (Spring), 55-69.

Day, G. (1994). The capabilities of market-driven organizations. *Journal of Marketing*. 58, 37-52.

Degeus, A.P. (1988). Planning as learning. *Harvard Business Review*, 66, 70-74.

Dickson, P.R. (1992). Toward a general theory of competitive rationality. *Journal of Marketing*, 56, 69-83.

Hessan D. & Whiteley R. (1996). *Customer centered growth: Five proven strategies for building competitive advantage*. Cambridge, MA: Perseus Books.

Jaworski, B. & Kohli, A. (1993). Market orientation: Antecedents and consequences. *Journal of Marketing*, 57, 53-70.

Lukas, B., Hult, G.T. & Ferrell, O.C. (1996). A theoretical perspective of the antecedents and consequences of organizational learning in marketing channels. *Journal of Business Research*, 36, 233-44.

Slater, S. & Narver, J. (1995). Market orientation and the learning organization. *Journal of Marketing*, 59(3), 63-74.

Research Methods

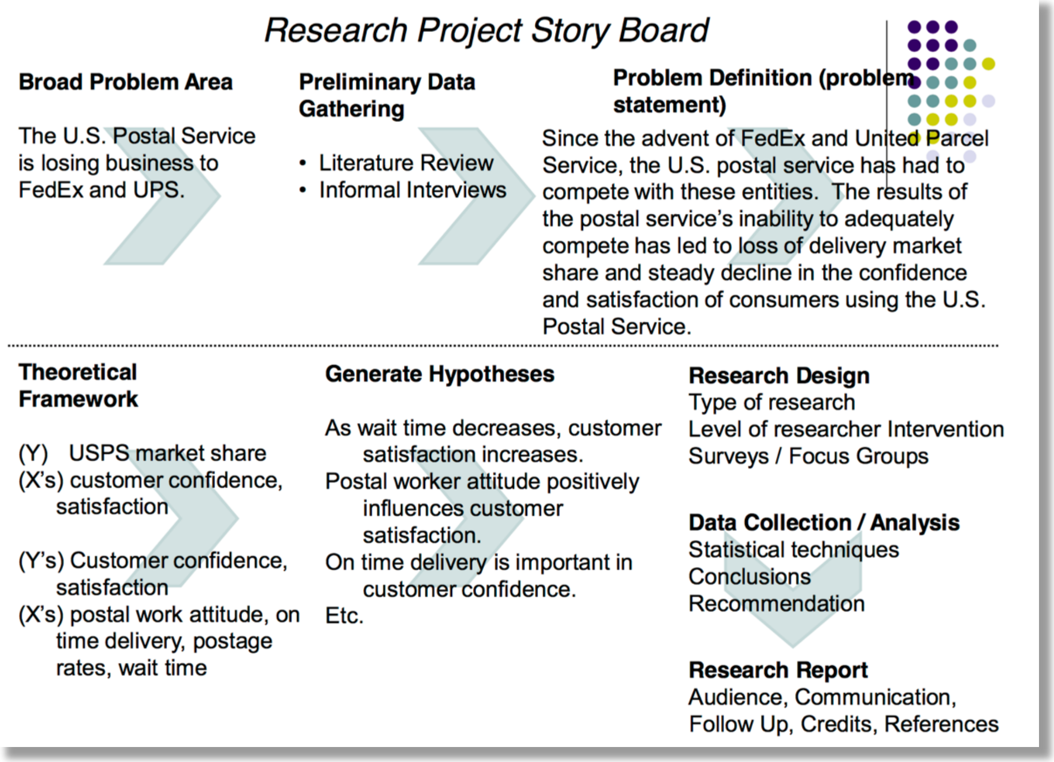
The following slides are provided from Professor Pat Schaeffer's Business Research Class covering things to consider for your project's research design. This is not an exhaustive list, therefore you should check your notes and textbooks for detailed information. As you develop your project, review these in order to develop a solid research approach to your project.

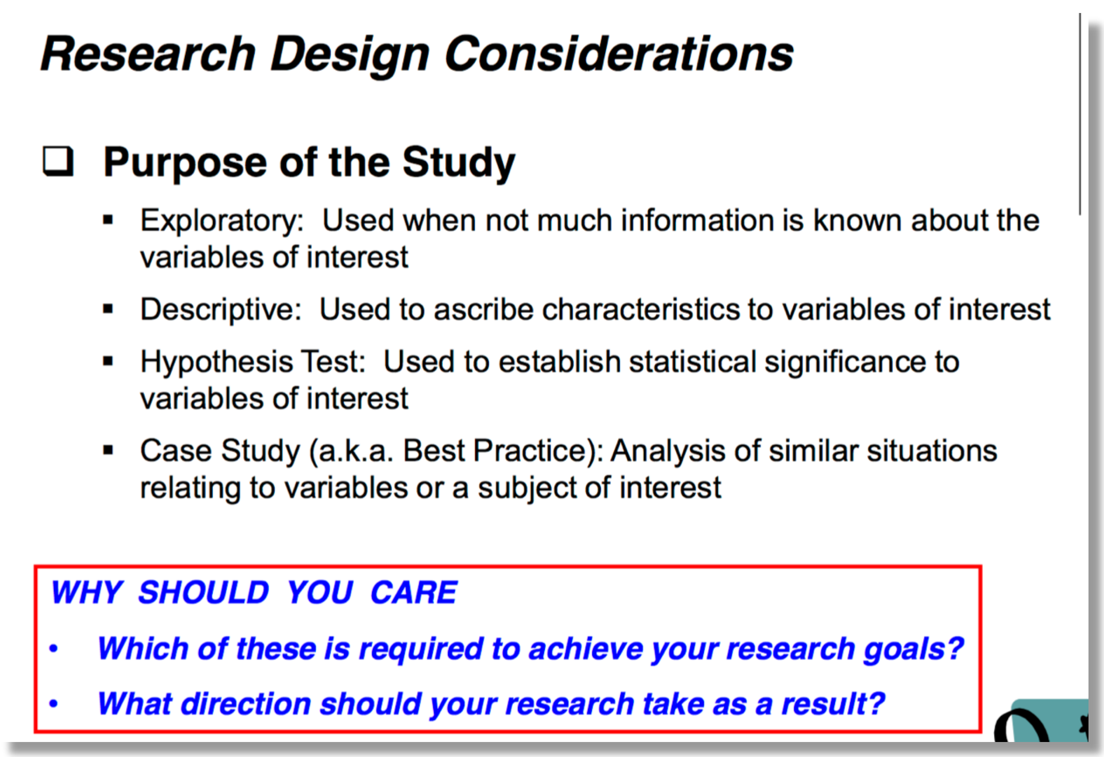
Commonly Researched Areas In Business

1. ***Employee behaviors such as performance, absenteeism and turnover***
2. ***Strategy formulation and implementation***
3. ***Employee selection, recruitment, training and retention***
4. ***Organizational outcomes: increased sales, market share, growth, effectiveness***
5. ***Brand loyalty, product life cycle, product innovation***
6. ***Risk assessment, exchange rate fluctuations, foreign investment***
7. ***Updates to policies in keeping with government and regulatory requirements***
8. ***Collection of accounts receivable***
9. ***Impression management, logos and image building***
10. ***Cultural differences and dynamics of managing a multi-national firm***
11. ***Alternative work structures: job sharing, flex time, telecommuting***
12. ***Keeping ahead of competition in the 3-5 year time horizon***
13. ***Differences in leadership positions, salaries and leadership styles***
14. ***Advanced manufacturing technologies and information systems***

7 Step Process in the Hypothetico-Deductive Method (aka Scientific Method)

1. Identify a broad problem area
2. Define the problem statement
3. Develop hypothesis
4. Determine Measures
5. Data Collection
6. Data Analysis
7. Interpretation of data


Research Project Story Board
Broad Problem Area
The U.S. Postal Service is losing business to FedEx and UPS.
Preliminary Data Gathering
• Literature Review
• Informal Interviews
Problem Definition (problem statement)
Since the advent of FedEx and United Parcel Service, the U.S. postal service has had to compete with these entities. The results of the postal service's inability to adequately compete has led to loss of delivery market share and steady decline in the confidence and satisfaction of consumers using the U.S. Postal Service.
Theoretical Framework
(Y) USPS market share
(X's) customer confidence, satisfaction
(Y's) Customer confidence, satisfaction
(X's) postal work attitude, on time delivery, postage rates, wait time
Generate Hypotheses
As wait time decreases, customer satisfaction increases.
Postal worker attitude positively influences customer satisfaction.
On time delivery is important in customer confidence.
Etc.
Research Design
Type of research
Level of researcher Intervention
Surveys / Focus Groups
Data Collection / Analysis
Statistical techniques
Conclusions
Recommendation
Research Report
Audience, Communication, Follow Up, Credits, References


Research Design Considerations
Purpose of the Study
Exploratory: Used when not much information is known about the variables of interest
Descriptive: Used to ascribe characteristics to variables of interest
Hypothesis Test: Used to establish statistical significance to variables of interest
Case Study (a.k.a. Best Practice): Analysis of similar situations relating to variables or a subject of interest
WHY SHOULD YOU CARE
• Which of these is required to achieve your research goals?
• What direction should your research take as a result?

Research Design Considerations

❑ Causal vs. Correlational

- X causes Y, vs. X is associated with Y

WHY SHOULD YOU CARE

- ***Even with Statistics, your research can't PROVE anything***
- ***Research makes inferences about variables and their characteristics & relationships***

❑ Researcher Interference

- Minimal: no interference other than observing outcomes
- Moderate: manipulation of variables in the research
- Excessive: manipulation of variables and environment

❑ Study Setting

- Field Study: Observational Study
- Field Experiment: Experimental setup (manipulation of variables) in the field (uncontrolled) environment
- Lab Experiment: Experimental setup (manipulation of variables) in a controlled environment

WHY SHOULD YOU CARE

- ***Research Validity and the need for Research Follow Up are contingent upon these research designs***
- ***A manager must be aware of the context within which research is conducted in order to make informed and accurate decisions***

Research Design Considerations

- **Units of Analysis**
  - Individuals
  - Dyads
  - Groups
  - Organizations
  - Cultures

WHY SHOULD YOU CARE

- ***Determines how you'll collect and analyze the data & report the information***
- ***Impacts conclusions, i.e., Group-Think***

- **Time Horizon**
  - Cross Sectional: One-shot; possibly over a period of days, weeks, etc.
  - Longitudinal: Collected at multiple points, i.e., seasons, before/after, etc.

WHY SHOULD YOU CARE

- ***Determines how you'll collect and analyze the data & report the information***
- ***Implications to conclusions, i.e., enough / appropriate data to draw conclusions***

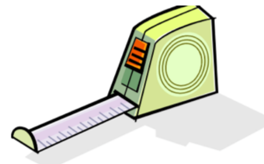
Methods To Primary Source Research

Observation	Understand customer patterns of usage by observing the customer using the product or service (Direct, Contrived, Content Analysis, Physical Trace, Empathic Interview, etc.).
Interview	Learn about a specific customer's point of view on service issues, product/service attributes, and performance indicators / measures; supports development of hypotheses about customer needs (semi structured, Nondirective, Focused, Individual In-Depth).
Focus Group	Organize information from the collective point of view of a group of customers that represent a segment; helps clarify and define customer needs (exploratory, clinical, and experiencing).
Survey	Measure the needs or the importance and performance of – a product, service or attribute across an entire segment or group of segments; furnishes quantitative data.

Research has shown that it takes 30 interviews or 5 focus groups to obtain 90% of customer consequences

Abbie Griffin and John R. Hauser, "The Voice of the Customer", Marketing Science 12, no 1: 1-26

Common Measurement Scales



Nominal

Provides responses that can be mapped to a number but are not indicative of order. Great for capturing demographics.

Example: Married = 1, Single = 2, Divorced = 3

Ordinal

Reflect a mapping of the responses to an ordered measure.

Example: Place grocers in order of customer satisfaction

Fred Meyer = 1, Safeway = 2, Albertsons = 3

Interval

Allows for rigorous analyses using common statistical methods.

Assumes the difference between scale values is equal

Example: A scale of 1 to 10, where 4 to 5 is the same as 1 to 2

Ratio

provides 'normalized' measures by using odds ratios or percentages. All other data can be described on a ratio scale.

Example: % favorable response

Other Scales

Rating Scales

- Dichotomous: Yes / No response
- Category: Nominal scaling; demographic in nature
- Likert: Scale of 1-5, 1-6, 1-10, 0-100, etc.
- Semantic Differential: Anchored; respondent marks a continuum
- Itemized Rating: Anchored; respondent writes in rating (i.e., 4 on a scale of 1-5)
- Fixed / Constant Sum: Assign points across a category
- Stapel Scale: A stated center point, above and below which +'s and –'s of ratings are placed; can be connected graphically.

Ranking Scales

- Paired Comparisons: Respondent chooses between two at a time
- Forced Choice: Assign rankings among several choices
- Comparative: A benchmark is provided, respondents choose (rank) items by comparison

Measurement Formats – Likert Format

Very Dissatisfied				Very Satisfied
1	2	3	4	5

Strongly Disagree	Disagree	Somewhat Disagree	Somewhat Agree	Agreed	Strongly Agree
1	2	3	4	5	6

Strongly Disagree									Strongly Agree
1	2	3	4	5	6	7	8	9	10

Advantages

- **Allows better discrimination in responses than checklist**
- **Shows direction & magnitude**
- **Familiar format**

Disadvantages

- **Requires more effort to collect data than yes/no**

Measurement Formats – Checklist Format

		Yes	No
1.	I could get an appointment at a time I desired…………	___	___
2.	The rep was available to schedule me at a good time…	___	___
3.	My appointment was at a convenient time for me……..	___	___
4.	The response was quick when I arrived…………………	___	___
5.	I was helped immediately when I arrived……………….	___	___
6.	My appointment started promptly at the scheduled time.	___	___

Advantages

- **Simplicity**

Disadvantages

- **Shows direction, but no magnitude**
- **Requires a lot of data to draw reliable conclusions**

Measurement Formats – Open Ended Format

Examples:

1. Please describe the availability of service:
2. What did you like best about your experience:
3. What are the three most important aspects of our business relationship?

Advantages

- **Respondents tend to like open questions better**
- **Information-rich; particularly where recurring themes are evident**

Disadvantages

- **Very difficult to analyze; typically only Pareto analysis**
- **Requires even more effort to collect data than Likert type**

10 Guidelines for Instrument (Survey) Validity

1. Be Specific about the question
2. Avoid ambiguous words
3. Build in redundancy
4. Anchor the questions
5. One thought per question
6. Avoid confusing language
7. Include an “overall” question
8. Provide an Intro, body, & conclusion
9. Test before use
10. Respond!

Interview / Questionnaire Approaches

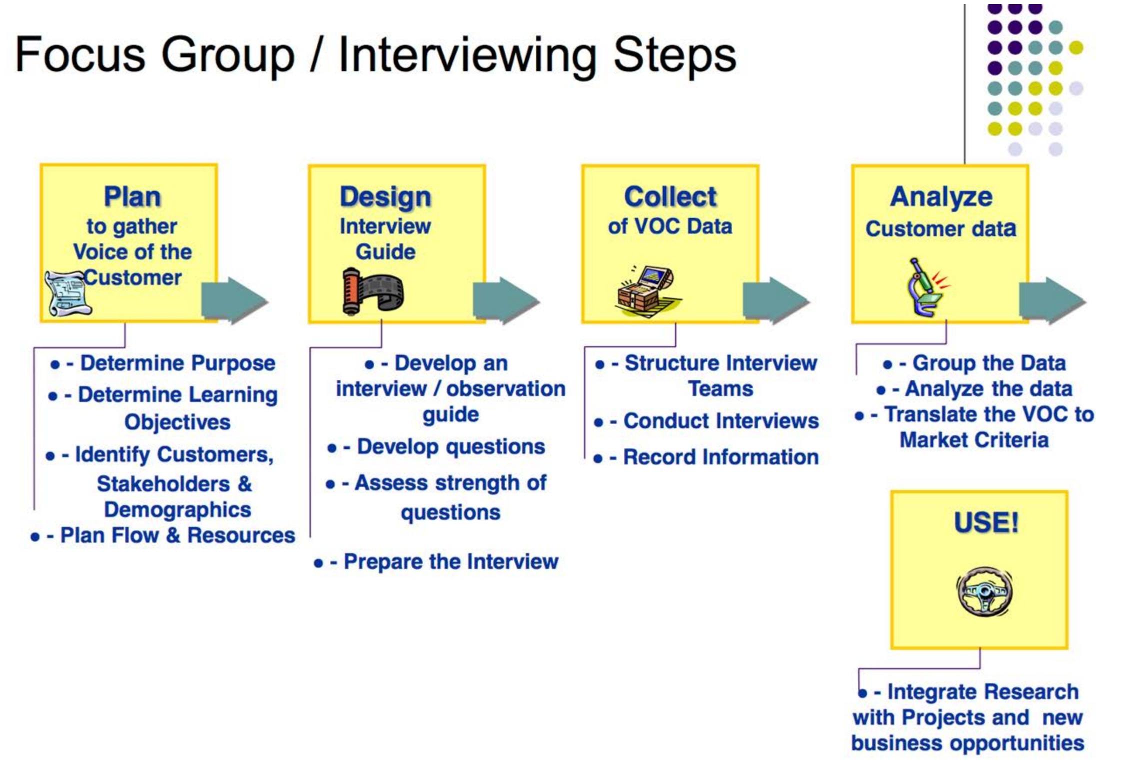
Mail
Characteristics:
Advantages / Disadvantages:

Telephone
Characteristics:
Advantages / Disadvantages:

Face-To-Face (structured vs. unstructured)
Characteristics:
Advantages / Disadvantages:

Electronic
Characteristics:
Advantages / Disadvantages:

Focus Group / Interviewing Steps



Focus Groups / Interview: What Could Go Wrong?

- **Refusals**
- **Interviewee Error**
  - **Concerns about privacy**
  - **Time, pressure, fatigue**
  - **Courtesy Bias**
  - **Uninformed Response**
- **Interviewer Error**
  - **Respondents Impression of Interviewer**
  - **Questioning, probing, recording**
  - **Fraud / Deceit**

Interview Question Guiding Principles

Be clear

Clear questions are

1. *Short (Keep it simple)*
2. *One dimensional*
3. *Jargon –free*

Be brief

– Keep the number of questions to a minimum & *ACTIONABLE!*

Seek help

– To ensure quality questions we need to get feedback from others (the team and “outsiders”)

Allow sufficient time

– Quality questions are not produced quickly

What Every Interviewer Should Know About Funneling (Probing)

Guidelines for Probing

Abstract

Judgments, inference, solutions, generalities

During the interview we want to move the speaker from broad, abstract terms to specific and concrete examples

Concrete

Evidence, needs, specifics

When you hear…	Probe for…
A proposed solution: “We should do….”	**Why the interviewee thinks the solution is a good idea** “What would that do for you?”
Loaded or emotionally-charged words: “This so-called process..”	**What drives the emotion:** “Could you give an example of how it affects your job?”
Speaking in third person: “They think that..”	**Personal experience:** “Could you describe an instance when this happened?”
An inference or judgment: “This vendor’s application would be great!”	**Evidence that led to judgment:** “What does it do for you that you couldn’t do before?”

Developing an Interview Guide

- ➢ Write an interview introduction
- ➢ Review your learning objectives
- ➢ Develop one or two questions per learning objective
  - The goal is to develop five or six questions that cover all of your leaning objectives
  - *Use open ended questions*
  - Some questions may not be relevant to all groups you intend to interview, so you…
    - *May need additional questions*
    - *May need separate set of questions for different groups*

Data Collection Plan

The Data Collection plan is a document developed prior to any data collection that outlines specific data collection details including:

- ❑ **Central Question the data intends to answer**
- ❑ **What type of data will be collected to answer the question**
- ❑ **The measurement scale**
- ❑ **Data description (type of data, sample size, sampling frequency)**
- ❑ **Analysis approach**
- ❑ **Operational Definitions**
- ❑ **Who will collect the data**
- ❑ **How the data will be collected (Standard Operating Procedure), i.e., personal or phone interviews, survey, focus group, random solicitation, etc.**

Statistical Analysis of Scales

SCALE	Comparison	Central tendency	Dispersion	Association	Significance
Nominal	Identity	Mode	Information	Contingency, correlation coefficients	Chi-Square
Ordinal	Order	Median	Percentiles	Rank-order correlation, Kendall's Tau, Kendall's W	Sign test, run test, Mann-Whitney U test
Interval	Intervals	Arithmetic Mean	Standard Deviation	Product-moment correlation, correlation ratio	t-test, F-test
Ratio	Magnitudes	Geometric Mean, Harmonic Mean	Percent of variation, coefficient of variation		

20-20 Analysis

The 20-20 analysis serves as a first-look summary of the survey response means and ranges. The purpose is:

1. Identify the top 20% of the mean responses to determine which questions rated most favorable
2. Identity the bottom 20% of the mean response to determine which questions rated least favorably
3. Identify the top 20% of the ranges to determine which questions were rated with the most variability
4. Identify the bottom 20% of the ranges to determine which questions were rate most consistently

Analysis of Variance (ANOVA)

The ANOVA determines whether difference in response averages exist. The purpose is:

1. Identify difference in responses within demographics or categories
2. Identify where difference in respondent experiences exist within demographics

Simple Regression

Simple Regression determines the extent to which a linear relationships exists between two variable or responses. The purpose is:

1. Identify which survey questions may be related.
2. Identify which survey questions might drive the overall response.

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Organization & Environmental Overview

Organization & Environmental Overview

One component of your project report will be a comprehensive overview of the organization and the environment related to your project. This is a critical piece of your work since your project and its solution must be customized for the organization. Even if you are creating a business plan for a new organization, understanding the organizational and environmental components are key to your success.

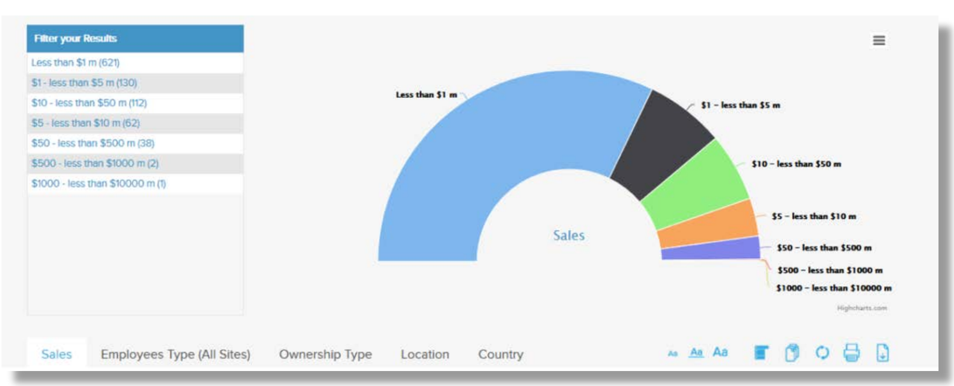
While this information is gathered throughout the project, the bulk of this is conducted and written in BUS496. **Do not just copy and paste sections of the company website.** While you may use the company website (with proper citation) remember that the purpose of a company website is to promote the organization – so it is not necessarily an objective source. **Therefore, seek out other sources, such as interviews, databases or articles to further research this information.**

Be sure to utilize your business knowledge when working on these sections. Be prepared when interviewing for these sessions by reviewing prior classwork. Use business terms throughout to provide a depth to this section of your report. **Consider both the micro and macro perspective of these topics. In other words, consider the company and its industry, but also consider how these topics will effect your project.**

The following summarizes each of these sections.

Organizational Overview Provide an overview of the organization by describing the organization's mission, vision, values, history, locations and products or services. Also, provide basic overview of the organization's ownership (sole proprietor, partnership, corporation (private, public or non-profit).

Industry Conduct research about your sponsor's industry (i.e. healthcare, construction, retail etc.). Use the Mergent Intellect database (in the Oregon Tech library) and US census data https://www.census.gov/econ/ as well as other industry databases to provide a macro view of the industry in which your sponsor is doing business. Research on multiple scales such as local, national and globally to determine how this organization fits into the industry. Your goal is to understand more about the industry and, depending on your project, the location and customer demographics.



More about Mergent Intellect Database
The library databases can be found at http://www.oit.edu/libraries/find/a-z
Select Mergent Intellect and then log in with your OIT user name and password
Most of the useful information can be searched for using an advanced search by industry. You can get data on the industry as a whole or drill down into specific companies. Here is a video to help you navigate the Mergent Intellect database https://www.youtube.com/watch?v=C2RyI457pv4

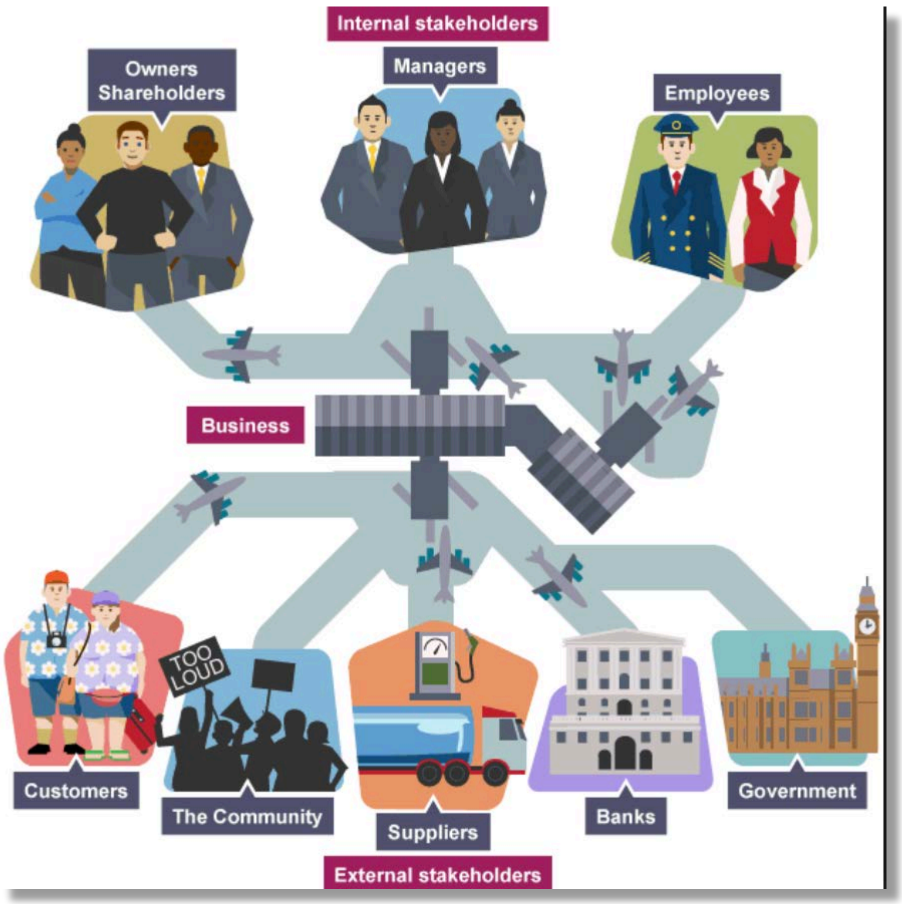
Organizational Culture, Structure and People Describe the organization's culture, leadership, structure and human resources. For example, what are the cultural aspects of the organization? What is the management structure? Is the company team oriented or is it a top-down style? What are the skill set of the employees and the strengths and weaknesses of human resources? How many people do they employ? Your goal is to provide an overall sense of the organization's management style and culture and how that can impact your project.

Financial Management Describe the general financial management of the organization. How are decisions made? How are budget's established and managed? Do they communicate financial or sales results with employees? What is the annual revenue? What other performance metrics are important to the organization? You may want to try to reach out to the person in charge of finance for the organization for a brief interview to learn more.

Marketing Describe the the products or services of the organization. Who are the customers and markets? Who is the consumer and target markets? What is the company's products positioning and distribution? How do they promote their product or services? You may want to try to reach out to the person in charge of marketing for a brief interview to learn more.

Information Technology Provide an overview on the information technology employed by the organization. Is this a small organization that has basic e-mail and network or do they utilize a sophisticated system? Are they key databases that help them manage things like accounting transitions and human resources? Do they outsource or manage their technologies internally? How could your project be effected by the information technology structure?

Stakeholder Analysis Describe and analyze all the stakeholders of the organization? Consider customers, vendors, suppliers, employees, community, and financial backers, regulatory agencies and the project team? What roles do they play and how are they affected by the success or failures of the company? How are these stakeholders affected by your project? Discuss and analyze the legal and ethical issues related to the stakeholders, organization and your project. Are there any regulatory or environmental issues?



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Professional Communications

Professional Communications

Throughout the duration of your project you will be expected to communicate with your sponsor utilizing professional communication methods. This section will provide guidance and suggested formats for your interactions.

The development of professional communication skills is extremely important as a business professional. These interactions often lead to first impressions of how others view you. In a recent survey conducted by the Business Management department at Oregon Tech, business professionals (including our alumni) stated that professional written, oral and interpersonal skills are some of the most needed skills in business. Therefore, throughout the course of your senior project you will get a chance to practice these skills.

Much of the following section is taken from:
Temple University. (2016). Professional Communications. Retrieved from http://www.temple.edu/provost/careercenter/alumni/professional-communication.htm

Meet & Greet

Meeting new people and building strong relationships is an important component of professional development. It is expected that you will meet and interact with new people throughout your senior project. People will be more willing and likely to want to help you and work with you if you are able to make a lasting positive impression on them. The following are some helpful hints to implement when meeting new people:
- Cell phones should be silenced.
- Introduce yourself "first and last name" and thank them for meeting with you.
- Always extend a firm handshake.
- Dress appropriately.
- Maintain proper posture, eye contact and smile.

Telephone

While in person meeting are preferable, there are times that you may need to communicate with your sponsors over the phone. When speaking with a professional on the telephone, it is important that you maintain proper phone presence. The following are some guidelines to help you participate in courteous phone conversations:
- Your voicemail messages should be professional and state your full name.
- If you have arranged a telephone conference, be sure to call at the precise time scheduled. If the call is coming in to you, make sure that you are prepared and answer the telephone on the first ring.
- Avoid distractions and surrounding noises. Do not eat, type, or participate in any other activities while on a phone call. Offer the individual your complete attention.

Video Conferences

Utilizing video chat or conference technology helps to add to the communication experience since participants can see gestures as well as hear voices. When participating in a video conference be sure to dress appropriately and be in a professional setting if possible. Don't just look like you rolled out of bed with your messy bedroom in the background.

E-Mail

Contacting people via email has become one of the most common forms of communication. While it is certainly acceptable to connect your sponsor through email, it is important that all of your communication is professional. People may not take you seriously if you are not able to communicate in a professional manner, thus, they may not even consider meeting with you or helping you. It is important to follow several guidelines when sending emails to ensure your professional reputation:

- Make sure you are using a professional email address such as your school address.
- Do not TEXT in an e-mail. You may be accustomed to sending text messages and emailing your friends using shorthand abbreviations or lower case. Professional e-mail must be written out in proper English.
- It is also important to use proper grammar and professional language in your emails. Instead of saying "you guys" say "your program". Instead of saying "we're" say "we are". Avoid using any type of slang, contractions, and inappropriate language.
- Make sure that you check all spelling and punctuation to avoid errors.
- Include a signature block at the end with your full name, and your contact information.
- Be considerate as to what you are forwarding to others.

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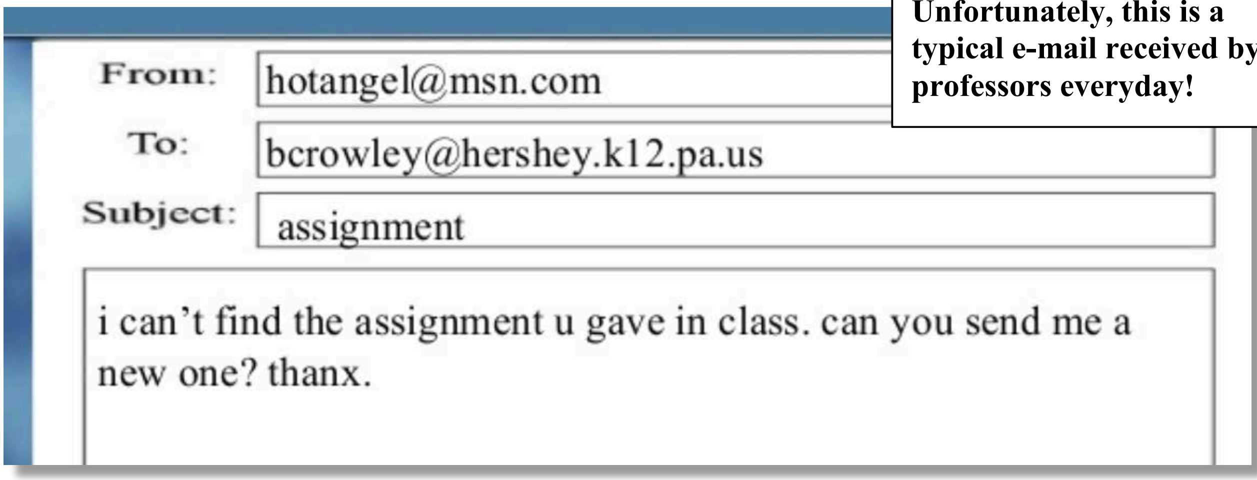
Examples of e-mail signature blocks. Also consider adding link to your LinkedIn or e-portfolio

Jane Doe
Director, National University Career Center
Ph: (800) 555-1234
Fax: (800) 555-5678
Jane.Doe@National.edu
Connect with me on LinkedIn:
www.linkedin.com/in/JaneDoe

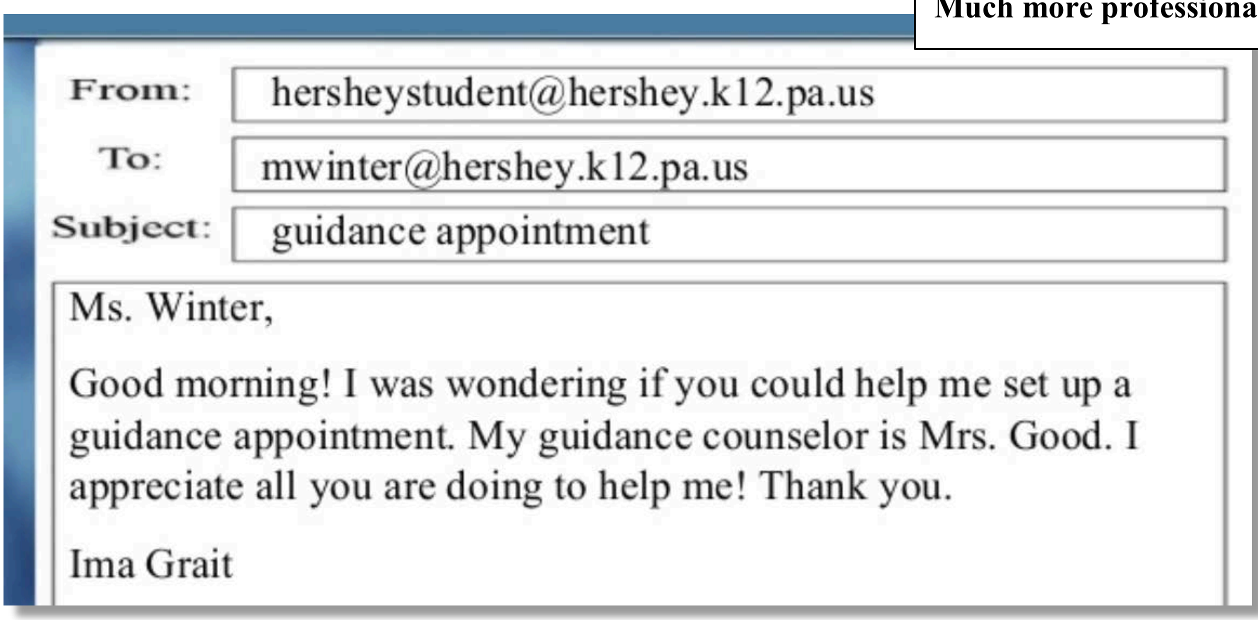
Example E-Mails

Unfortunately, this is a typical e-mail received by professors everyday!


From: hotangel@msn.com
To: bcrowley@hershey.k12.pa.us
Subject: assignment

i can't find the assignment u gave in class. can you send me a new one? thanx.

Much more professional!


From: hersheystudent@hershey.k12.pa.us
To: mwinter@hershey.k12.pa.us
Subject: guidance appointment

Ms. Winter,

Good morning! I was wondering if you could help me set up a guidance appointment. My guidance counselor is Mrs. Good. I appreciate all you are doing to help me! Thank you.

Ima Grait

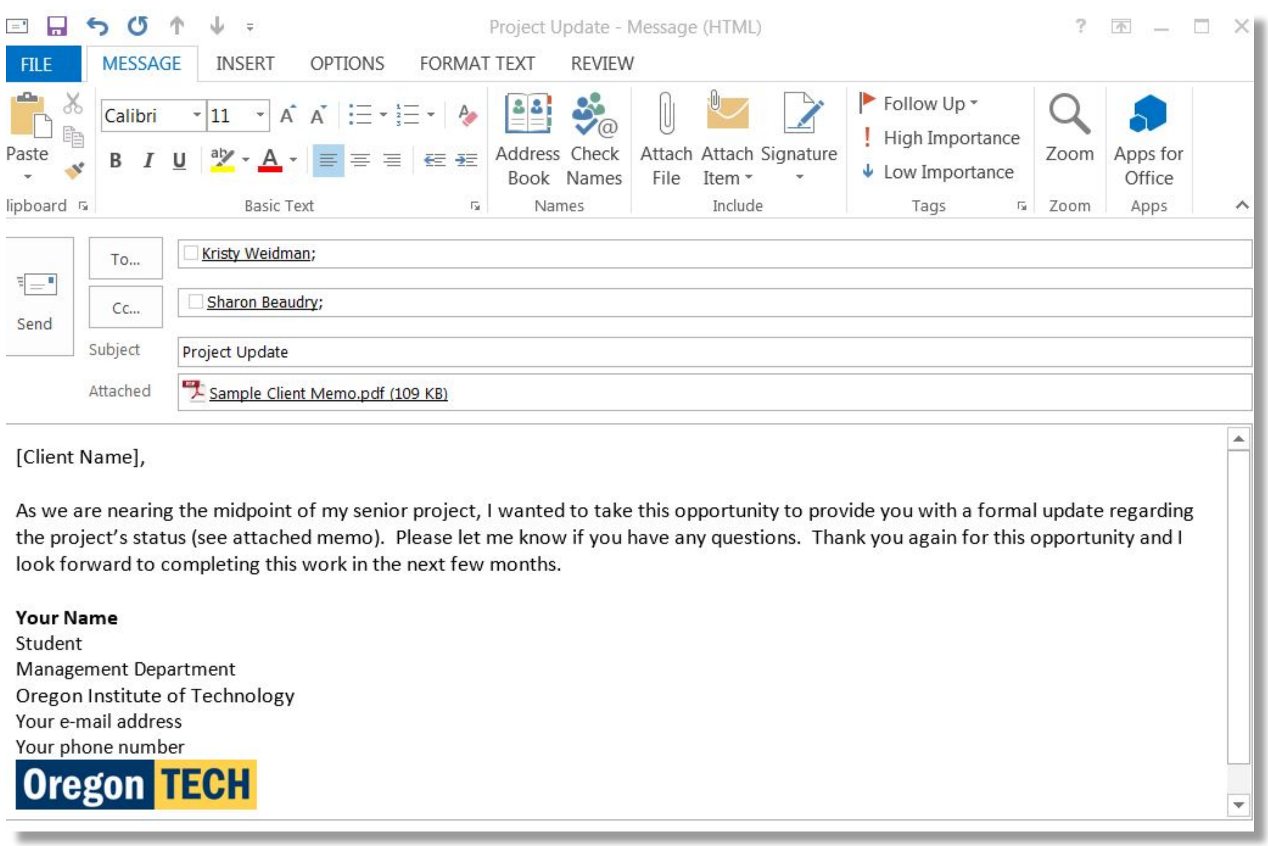
Mid-Project and Final Sponsor Memos

Along with informal communication with your sponsor throughout the project, you will prepare a formal report to your client at the end of BUS496 and BUS497. These reports should be well written in a memo format. The goal of Mid-Project memo is to inform your sponsor of the progress that has been made towards the project objectives. You may also wish to include some challenges along with suggestions for overcoming these challenges. The mid-project client memo should not include any conclusions or recommendations.

The sample memo includes an invitation to a final poster session. (For the online classes- we typically have an online presentation with classmates.) The best way to conclude is to let your sponsor know that you will be providing them with an update and a final report at the end of the project.

The final memo serves as an executive summary of your project therefore include an overview, as well as findings and conclusions. When sending this one, you will also include your final written report in PDF format.

Send these memos in a professionally written e-mail like the one below. Do not just attach it to an e-mail and hit send since that is highly unprofessional. Be sure to copy your faculty mentor and your instructor.



Memo

Date: November 14, 2015
To: John Smith, President
From: Sharon Beaudry
Re: Project Update

Simple Memo format. Be sure to have correct title of your sponsor.

As you know, my senior project entails developing a solution to address recruitment strategies to increase employee diversity. As we near the end of fall term, I wanted to take this opportunity to provide you with a formal update on the progress of the project.

Intro should include one sentence summarizing your project topic.

As of this date, the following has been completed on this project:

his section hould include l work done to ate such as us nvironmental can, primary nd secondary esearch

- **The Organization**: An environmental scan has been conducted to understand all functional areas of the business, particularly in relation to the project. The gathering of this knowledge will aid in a custom solution that will apply directly to the organization. For example, understanding the job types, requirements and culture will be important in determining various recruitment sources.

Business environment scan

- **Secondary research has been conducted in the following areas:**
  - **Business rationale**: Research was conducted to understand and develop a business rationale for increasing employee diversity. This research has yielded several studies and cases in which the increase of diversity has lead to increased in […give detailed specifics].
  - **Recruitment methodologies**: Additionally, research was conducted to understand how other similar organizations have approached the problem of creating a diverse candidate pool. This research has generated a variety of approaches including [give examples].

Secondary research and lit. review

- **Data has also been directly gathered at the organization including:**
  - **Current recruitment methods**: A sampling of employee searches conducted over the last two years was selected from a cross-section of positions. This data was gathered to determine recruitment sources that yielded the best results in terms of numbers a diverse candidate pools.
  - **Survey**: A survey was developed and administered to gather employee input regarding recruitment ideas related to increasing diversity. Additionally, employees were asked about additional training needs for selection committees. This survey was conducted in November.

Primary research

The following work will be completed during the next term, which will be completed no later than the middle of March 2015:

his section hould nclude all the ork still to e done such s analysis nd final eliverables

- **Analyze data**:
  - **Recruitment methods:** The current recruitment methods data will be analyzed to determine continuing supporting or discontinuing these methods. The goal is to provide a quantitative analysis of each recruitment method by job category, cost and yield of diverse candidate pool.
  - **Survey Analysis:** The survey will be analyzed to determine training needs for selection committees. Additionally, various recruitment sources will be gathered and

Analysis of primary data

analyzed. From there, additional research will be conducted regarding the cost and appropriateness of these sources.

- **Development of a diversity recruitment plan which will include the following deliverables**:
    - **Summary of data:** A complete summary of the secondary and primary research will be provided including current recruitment methods, survey analysis and a literary review of the secondary research.
    - **Updated approach:** Based on this research, a new approach will be developed to increase the diversity of candidate pools of all job categories. Since many of these job categories are highly specialized, a varied approach is expected. Specific recruitment methods will be identified along with the cost.
    - **Ongoing Assessment:** Also included will be an ongoing assessment process so your organization can determine the success of each of these methods and sources.

Also include your final project deliverables

I look forward to continuing the work in order to achieve a successful project outcome. I hope you will be able to attend the Business Management's Senior Project Symposium on Wednesday, March 9th from 4:30 to 6:30 pm on the Oregon Tech campus in Klamath Falls, when all of the projects will be presented to sponsors, family, faculty and the community.

Lastly, include invitation to the Project Symposium.

Oregon TECH

Writing

Writing Your Report

A great deal of your efforts throughout the senior project courses will be spent on writing your project report. This report must be written using English grammar, business terms, professional language, organization and APA style formatting. Final reports usually run between 30 and 60 pages. You will build this report over the course of each term. Keep in mind that with few exceptions, every piece of weekly work will be used to build this final report. Doing a good job each week will make your task of writing this report much easier. Therefore, it is important to keep several things in mind:

Writing Help

Peer Consulting is a completely free academic support service available for all students of Oregon Tech. The Peer consultants offer assistance with your writing and all senior project students are encouraged to utilize this service. They do not proofread it for you, but they will help you to proofread or answer specific questions.

- **Appointments:** You can make an individual in-person appointment with a peer consultant as follows:
  - **Klamath Falls:** Make an appointment through PSC Online at http://www.oit.edu/academics/ssc/peer-consulting-services , call them at 541-851-5226, or e-mail peerconsulting@oit.edu . They are located at LRC 233.
  - **Wilsonville:** Make an appointment http://www.oit.edu/wilsonville/student-services/peer-consulting, call 503-821-1263, or e-mail w.peerconsulting@oit.edu . The are located in Room 429.
  - Both centers allow for **drop in** help as well as **online** sessions.

- **Online Writing Lab:**

  You can also submit your paper and any questions to the Online Writing Lab and a consultant will review it, offer suggestions for revision, and provide you resources for improving your writing. Sorry, they don't actually edit your papers, make changes for you, or write it for you.

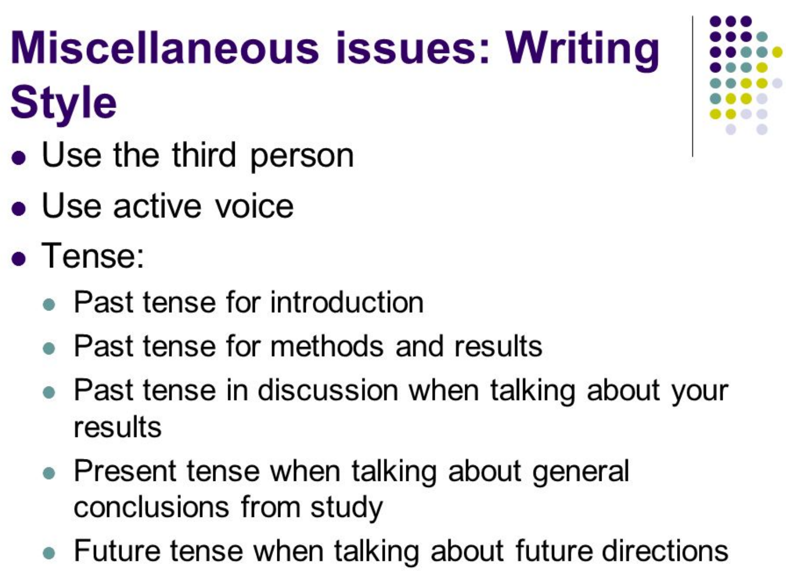
Senior Project Template

You will be provided a senior project template which will help build and organize your written report. The report is presented using APA formatting. A portion of this will be due every term and the final written project due in BUS497. See a copy of this template in the Appendix.

Writing Style: Third Person Past Tense

Never use personal pronouns like "I" or "we"

The entire report is to be written in the **third person past tense**. In that format, you will never use personal pronouns like "I" or "we" and you will always refer to what happened in the past, not in the present or future tense. The report describes and discusses what transpired during the course of completing your project so everything already happened, in the past. For example, instead of writing, "I met with the owner and conducted an informational interview" you would write, "An informational interview was conducted with the owner."



When you discuss recommendations for further work (which would occur in the future) you will need to use future tense as appropriate. For example, you might write, "The project success should be monitored and additional surveys should be administered and analyzed six and twelve months following initial implementation." If specific plans are in place for extending the project in the future you might write, "Additional foundations will be approached in an attempt to obtain the final $30,000 needed to complete the project."

Opinion vs. Fact-Based Writing

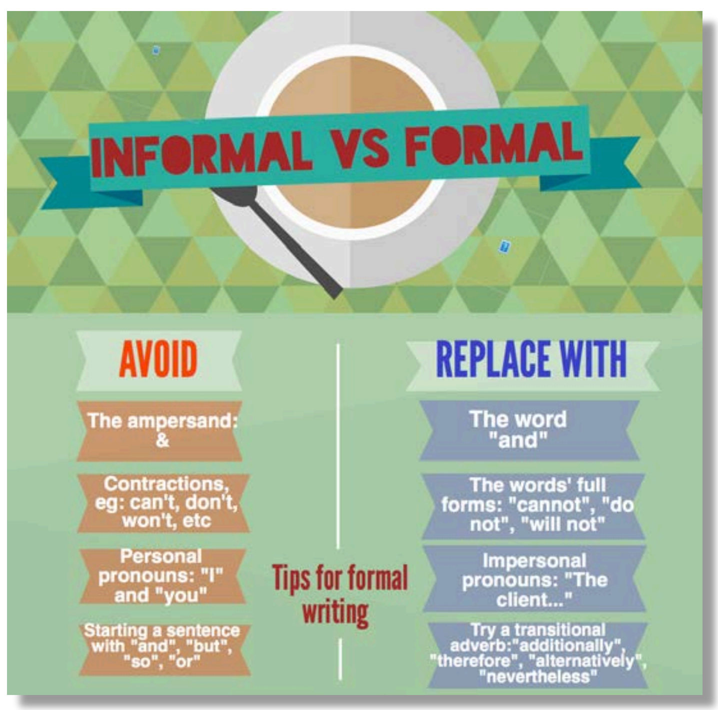
A credible and professional report draws its conclusions based on facts and research. Therefore, your opinion, on its own, is not appropriate to include in the report. When making a conclusion always ask yourself if you have credible research in your report to back it up. If so, state, "based on [research] it is reasonable to conclude the following…"

Also, your writing style needs to be straightforward and factual. Adding phrases such as "The project will be GREAT for the company's marketing efforts" indicates an opinion. Instead of opinion-based rhetoric use fact-based language as you write.

Formal Business Writing Style

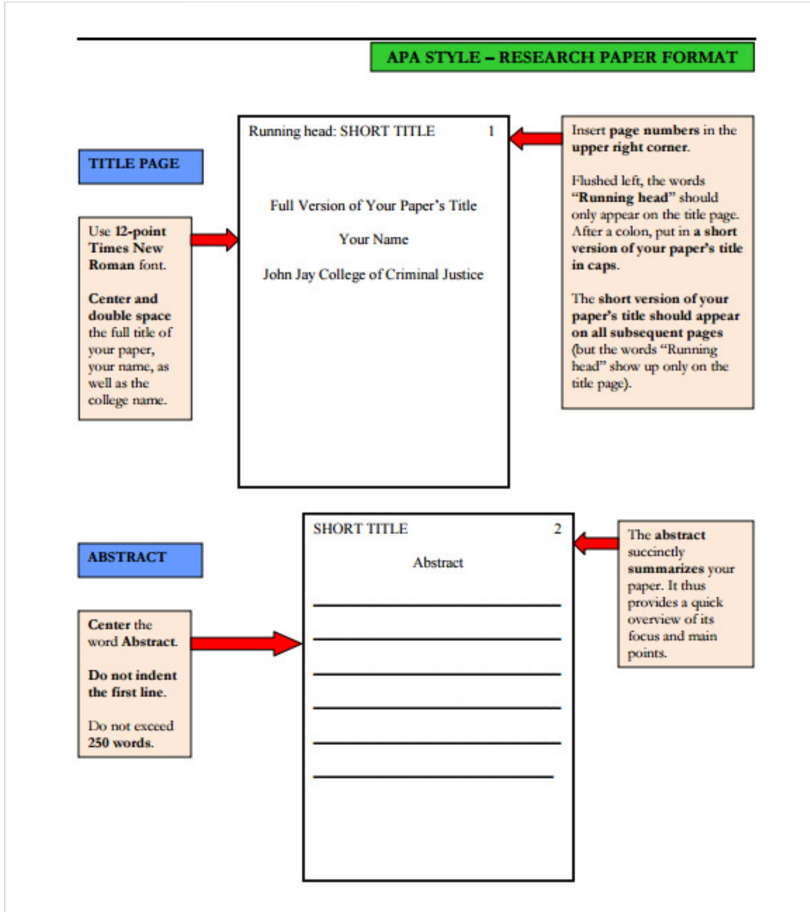
Your report should be written in a formal and professional style. This may mean that you can not write like you talk or text. The following are some helpful hints as you write your report:

- **Use Business Terms:** For example, "estimate or forecast" should replace "come up with."
- **Less is more:** Good business writing is concise and straight to the point.
- **Use graphs:** Adding graphs or figures helps your reader to quickly grasp your data or research.
- **No Contractions:** Keep it formal.
- **Use Full Names and/or Titles:** Throughout your report use formal names and titles consistently. Do not just call your sponsor by their first name.
- **Support Conclusions with Data/Research:** This is worth repeating!! There is no place for your opinion on its own.
- **Audience:** Always keep your audience in mind.
- **Write Once, Check Twice:** Be sure to proofread over and over again! Ask yourself if your sentences are complete sentences? Have you punctuated correctly? That may mean an occasional comma! Using the spell check and grammar check functions are good steps in the proofreading process, but you cannot stop there because, unfortunately, these functions may not catch the most common mistakes. They will not catch, for example, homonyms such as there vs. their vs. they're.



APA Formatting

APA (American Psychological Association) style is most commonly used to cite sources within the field of Business. Keep in mind that APA is not just a way to present your list of references or in-text citations. It is a provides guidance on everything from how to format your title page, label your charts and number your pages. Below are several links to APA online sources. The next several pages include guidance on the most commonly used APA formatting.



Online APA Sources at Purdue OWL

Complete online guide to APA
https://owl.english.purdue.edu/owl/resource/560/01/

Formatting Basics Video
https://www.youtube.com/watch?v=pdAfIqRt60c&list=PL8F43A67F38DE3D5D

Reference List Basics
Part 1:
https://www.youtube.com/watch?v=HpAOi8-WUY4&list=PL8F43A67F38DE3D5D&index=2

Part 2:
https://www.youtube.com/watch?v=NvIe2McNbYI&index=3&list=PL8F43A67F38DE3D5D

Reference and Citation Examples

Basic guidelines for formatting citations in the text

1. Place the complete citation within parentheses.
2. Use the author's last name and year for the citation: (Smith, 2008).
3. Place the year in the citation, but do not include the month and day.
4. Use only the *last name* of the author, and never include the first name or initials.
5. Place the name of a group author (corporations, associations, and government agencies) first when no individual author is listed in the source.
6. Use the first two or three words of the title of the work when no author is listed: (Writing Executive Summaries, 2007). Capitalize all major words of the title.
7. Include the page or paragraph number for a direct quotation: p. or pp. for page numbers, para. or ¶ for paragraph numbers.
8. Place any necessary punctuation *after* the final parenthesis of the citation unless it is a block quote.
9. Never use a URL address in the citation.

Basic guidelines for formatting the References page

1. Place the references in alphabetical order. (Do not number references.)
2. Use periods to separate each major element in the reference: Name, A. (Year). Article title. *Journal Title, 24*(4), 13-16.
3. Include the author's last name and first and middle *initials*: Smith, G. Q. (Always *use initials* instead of authors' first/middle names.)
4. Place the year in parentheses after the author's name: Smith, G. Q. (2008). If no year is available, put (n.d.) in parentheses.
5. Place the title of a book or article first when no author is listed in the source.
6. Place the name of a group author (corporations, associations, and government agencies) first when no individual author is listed in the source.
7. Capitalize the following elements of the *first title* (e.g., article titles, chapters from a book) listed in the reference: first word, proper nouns, and the first word after a colon or a dash.
8. Capitalize all major words of the *second title* (e.g., journal titles, newspaper titles, book titles) listed.
9. Use *italics* instead of quotation marks for titles of books, journals, newspapers, and movies.
10. Never use quotation marks or italics for article titles.
11. Include the retrieval date and location information for Internet sources: Retrieved May 10, 2008, from ProQuest database.
12. Never use the URL address for a source retrieved from a database.
13. Never include a source that is not mentioned in the paper.

Updated: January 2009

Table of Contents

The following examples provide information about how to format citations in text and how to format the corresponding source on the reference page. Note: The American Psychological Association has added a supplement to the 2001 *APA Manual* called *APA Style Guide to Electronic References*. The supplement is for purchase through http://apastyle.apa.org and provides example reference entries for a variety of Web sources.

<u>A book with one author</u>

A book with one author could be formatted in any of the following ways:

In-Text Citation

Sample 1 According to Venes (2001), three types of influenza are spreading throughout the country.

Sample 2 Three types of influenza are spreading throughout the country (Venes, 2001).

Sample 3 Venes (2001) stated, "The types of influenza doctors must prepare for fall into three categories" (p. 106).

[Note: Page or paragraph numbers are always included with the in-text citation when direct quotations are used.]

Reference Page Citation

Venes, D. (2001). *Taber's cyclopedic medical dictionary* (19th ed.). Philadelphia: F.A. Davis.

In-Text Citation

Sample 4 Cleckley (1997) noted that diversity in the classroom prepared young Americans for work in a global society.

Sample 5 Diversity in the classroom prepared young Americans for work in a global society was the idea presented by well-known scholar Betty Jane Cleckley (1997).

Sample 6 Cleckley (1997) stated, "Because youth have had experience working and playing with children of other races and cultures while growing up, they will be better able to interact with those of other cultures when working within intercultural corporations" (p. 37).

Reference Page Citation

Cleckley, B. (1997). *Strategies for promoting pluralism in education and the workplace.* Westport, CT: Praeger.

A book with two or more authors

A book with two or more authors could be formatted in any of the following ways:

In-Text Citation

Sample 1 Often, people compare Caldwell and Thomason's book (2004) to *The DaVinci Code* because of the brilliant writing and historical context.

Sample 2 *The Rule of Four* (Caldwell & Thomason, 2004) has been compared to Dan Brown's *The DaVinci Code.*

Sample 3 The novel is described as **"**an encyclopedia masquerading as a novel" and as "a dissertation on everything from architecture to zoology" (Caldwell & Thomason, 2004, p. 136).

Reference Page Citation

Caldwell, I., & Thomason, D. (2004). *The rule of four*. New York: Dial.

In-Text Citation

Sample 4 Mandelbrot and Hudson (2004) have combined Mandelbrot's mathematical framework with Hudson's knowledge of Wall Street to produce a must-read for any serious investor.

Sample 5 For the individual who manages money for a living, one of the best books on the market is *The Misbehavior of Markets* by Mandelbrot and Hudson (2004).

Sample 6 Mandelbrot and Hudson (2004) stated, "This equilibrium market clearing price is automatically interpreted as being the mean of a normal probability distribution" (p. 46).

Reference Page Citation

Mandelbrot, B., & Hudson, R. L. (2004). *The misbehavior of markets*. New York: Basic Books.

<u>A book with a group author</u>

A book with a group author could be formatted in any of the following ways:

In-Text Citation

Sample 1 *The 9/11 Commission Report* (National Commission on Terrorist Attacks, 2004) is one of the most important documents of this century.

Sample 2 A clear mandate was expressed by The National Commission on Terrorist Attacks (2004).

Sample 3 The National Commission on Terrorist Attacks report stated, "Investigate the facts and circumstance relating to the terrorist attacks of 9/11 . . . and other areas as determined by the Commission" (2004, p. 14).

Reference Page Citation

National Commission on Terrorist Attacks. (2004). *The 9/11 commission report: Final report of the National Commission on Terrorist Attacks upon the United States.* New York: W.W. Norton.

<u>An online dictionary (New Entry!)</u>

An online dictionary entry could be formatted in the any of the following ways:

In-Text Citation

Sample 1 According to the *Oxford English Dictionary* (n.d.), a *caucus* is a political party meeting that occurs prior to an election and is used to further the party's interests.

Sample 2 A *caucus* is usually a "private meeting of the leaders or representatives of a political party" (*Oxford English Dictionary*, n.d.).

Reference Page Citation

Caucus. (n.d.). In *Oxford English dictionary online*. Retrieved July 17, 2008, from http://www.oed.com/

A journal article

A journal article could be formatted in any of the following ways:

In-Text Citation

Sample 1 Walker and Schutte (2002) believed that the five areas of team building were not inclusive of all the areas needing attention.

Sample 2 Not everyone agrees with the five areas of team building (Walker & Schutte, 2002).

Sample 3 According to Walker and Schutte (2002), "Over time, perceptions of effectiveness and actual effectiveness can build on each other, because teams that are confident of success tend to experience success, which in turn sustains or increases perceptions of efficacy while also building general cohesiveness" (p. 188).

Reference Page Citation

Walker, J. S., & Schutte, K. M. (2004, Fall). Practice and process in wraparound teamwork. *Journal of Emotional and Behavioral Disorders, 12*(3), 182-192.

A journal article from an online database

A journal article from an online database could be formatted in any of the following ways:

In-Text Citation

Sample 1 Daniels (2004) included Garden Restaurants on his list of the 50 best companies for minorities.

Sample 2 A list of companies has been singled out as best for minority employees (Daniels, 2004).

Sample 3 According to Daniels (2004), "At the Olive Garden and Red Lobster chains, diversity efforts are encouraged from 'boardroom to dining room'" (¶ 5).

[Note: No page number was listed in this particular article because of the way the article was written. When no page number is available, count the paragraphs and use the paragraph number, as above. In long documents, you can count the paragraphs of a particular section and indicate the name of the section within the citation: (Daniels, 2004, Methods section, ¶ 3).]

Reference Page Citation

Daniels, C. (2004, July 28). 50 best companies for minorities. *Fortune, 149*(13), 136-141.

Retrieved October 19, 2004, from ProQuest database.

A journal article from an online database—no author

A journal article with no author from an online database could be formatted in any of the following ways:

In-Text Citation

Sample 1 In its "Corrections" section (2004), *Fortune* magazine did name the CEO of Rite-Aid who is currently in prison for fraud.

Sample 2 *Fortune* magazine did name the CEO of Rite-Aid who is currently in prison for fraud ("Corrections," 2004).

Reference Page Citation

Corrections. (2004, November 1). *Fortune, 150*(9)*,* 32. Retrieved November 3, 2004,

from ProQuest database.

A journal article from an online database with an assigned DOI® (New Entry!)

DOI stands for Digital Object Identifier and is an identification record provided by the publisher. If the journal article has a DOI, use the DOI in lieu of the retrieval date, the online database name, and the URL. A journal article from an online database with an assigned DOI is not formatted any differently in the in-text citation but is formatted differently on the reference page.

In-Text Citation

Sample 1 Tzschenteke, Kirk, and Lynch (2004) studied the motivations behind why lodging owners in Scotland made the move to *green* their properties.

Sample 2 Operational cost reduction was one reason some hotel owners opted to *green* their properties (Tzschenteke, Kirk, & Lynch, 2004).

Sample 3 This paper "discusses the preliminary findings of a wider study on environmental decision making in the context of owner-managed lodging operations" (Tzschenteke, Kirk, & Lynch, 2004, p.116).

Reference Page Citation

Tzschentke, N., Kirk, D., & Lynch, P. A. (2004). Reasons for going green in serviced accommodation establishments. *International Journal of Contemporary Hospitality Management*, *16*(2), 116-124. doi: 10.1108/09596110410520007

A newspaper article

A newspaper article could be formatted in any of the following ways:

In-Text Citation

Sample 1 Herron and Miles (1987) addressed the recent Supreme Court decision regarding promotions based on race.

Sample 2 Efforts have been made regarding racial parity (Herron & Miles, 1987).

Sample 3 The Supreme Court declared, “A company may decide to promote an employee on the basis of race under certain circumstances” (Herron & Miles, 1987, p. 32).

Reference Page Citation

Herron, C. R., & Miles, M. A. (1987, March 1). Promotion based on race is upheld by Supreme Court. *The New York Times*, p. e4.

An online newspaper article (New Entry!)

An online newspaper article could be formatted in any of the following ways:

In-Text Citation

Sample 1 McGrath (2007) interviewed some *Oxford English Dictionary* employees about the deletion of hyphens from 16,000 dictionary entries.

Sample 2 The recent article about the deletion of 16,000 hyphens from the *Oxford English Dictionary* explored how hyphens have become unnecessary with many words in modern usage (McGrath, 2007).

Sample 3 McGrath (2007) stated, “The greatest hyphenator ever was Shakespeare (or Shakspeare in some contemporary spellings) because he was so busy adding new words, many of them compounds, to English: ‘sea-change,’ ‘leap-frog,’ ‘bare-faced,’ ‘fancy-free’” (¶ 8).

Reference Page Citation

McGrath, C. (2007, October 7). Death-knell. Or death knell. *The New York Times*. Retrieved from http:www.nytimes.com

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<u>A Web site with no identifiable author</u>

When the content on a Web site has no identifiable author, use the name for the organization, corporation, or government agency as the group author and begin the entry with the group author. Place the title of the Web page in italics and include a Web address that leads directly to the content. If the Web site has no identifiable author, including no identifiable group author, you should use caution in selecting the source for your paper, as the source may not be a reliable reference. A Web site with no identifiable author could be formatted in any of the following ways:

In-Text Citation

Sample 1 The Web site for the National Osteoporosis Foundation (2008) has many interesting facts about this debilitating disease.

Sample 2 Osteoporosis is a highly preventable disease (National Osteoporosis Foundation, 2008).

Sample 3 The National Osteoporosis Foundation (2008) stated, “Eighty percent of those affected by osteoporosis are women” (Osteoporosis Prevalence: Gender, para. 2).

Reference Page Citation

National Osteoporosis Foundation. (2008). *Fast facts.* Retrieved July, 2009, from http://www.nof.org

In-Text Citation

Sample 4 Subaru of America (2004) makes it easy to compare its Outback with similar cars.

Sample 5 Subaru currently has five models in its lineup (Subaru of America, 2004).

Sample 6 According to Subaru of America (2004), “All Subaru Outback models blend the rugged versatility of an SUV with the driving performance and comfort of a passenger car” (¶ 1).

Reference Page Citation

Subaru of America, Inc. (2004). *Subaru previews all-new*. Retrieved November 4, 2004, from http://www.subaru.com

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<u>A Web site with an author</u>

A Web site with an author could be formatted in any of the following ways:

In-Text Citation

Sample 1 According to Copeland (2003), the adaptation required when minorities enter the workplace is a two-way street.

Sample 2 Diversity is a positive thing in the workforce (Copeland, 2003).

Sample 3 Copeland (2003) stated, "Diversity is emerging as one of the most serious issues in the workplace today, yet most employers are not prepared to deal with it" (Managing a Multicultural Workforce, ¶ 1).

[In a long online document with no page numbers, you can list the title of the section and the paragraph number within that section.]

Reference Page Citation

Copeland, L. (2003). Managing a multicultural workforce. *California Job Journal.* Retrieved October 16, 2004, from http://www.jobjournal.com

In-Text Citation

Sample 4 According to Nix (2004), no definitive national Christmas tree exists.

Sample 5 Apparently, four trees could be the national Christmas tree in the United States (Nix, 2004).

Sample 6 Nix (2004) mentioned that "four trees touted to be the nation's Christmas tree" (¶ 1).

Reference Page Citation

Nix, S. (2004). The Amazon and neotropical rainforest. Retrieved November 6, 2004, from http://forestry.about.com

***Microsoft® PowerPoint®* presentations**

References to Microsoft PowerPoint presentations can take two forms:
PowerPoint as a presentation
PowerPoint as an online presentation

PowerPoint as a presentation

Sometimes it is necessary to reference a PowerPoint presentation you have seen, either by itself or as part of a longer presentation. If the presentation cannot be retrieved by the general reader, cite the PowerPoint as a personal communication only within the text.

In-Text Citation

Sample 1 According to a PowerPoint presentation in the GEN 380 class (2006), the streets in Toronto are cleaner than the streets in New York.

Sample 2 The streets in Toronto are cleaner than the streets in New York (GEN 380, personal communication, September 3, 2006.)

[Note: If the name of the presenter is known, use the first initial and last name of the presenter instead of the name of the class, as follows:
(G. Smith, personal communication, September 3, 2006).]

Sample 3 According to a PowerPoint presentation in the GEN 380 class, "Compared to New York City, Toronto's streets are free of litter, graffiti, and garbage" (personal communication, September 3, 2006).

[Note: In a personal communication that is not written, do not use page or paragraph numbers with a direct quotation.]

Reference Page Citation

A personal communication is not listed in the references.

PowerPoint as an online presentation (New Entry!)

An online PowerPoint presentation can be formatted in any of the following ways:

In-Text Citation

Sample 1 According to a PowerPoint presentation from the National Security Council (2007), the United States has succeeded in reaching many of the objectives outlined at the start of the war with Iraq, including the capture of Saddam Hussein.

Sample 2 The United States has succeeded in reaching many of the objectives outlined at the start of the war with Iraq, including the capture of Saddam Hussein (National Security Council, 2007).

Sample 3 According to a PowerPoint presentation from the National Security Council (2007), "Winning in Iraq will not end the War on Terror, but it will make success in the War on Terror much easier" (slide 3).

Reference Page Citation

National Security Council. (2007, January). *Highlights of the Iraq strategy review* [PowerPoint slides]. Retrieved from http://www.whitehouse.gov/nsc/iraq/2007/iraq-strategy011007.pdf

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Personal communication

Sources that the general reader cannot access should be cited as a personal communication. This can include information from interviews, emails, newsgroups, letters, memos, lectures, and Microsoft® PowerPoint presentations.

A personal communication is cited only within the text because items in the reference list at the end of the essay are reserved for sources that can be retrieved by the reader.

In-Text Citation

Sample 1 According to Smith (personal communication, September 3, 2006), pit bulls are no more dangerous than German shepherds.

Sample 2 Pit bulls are no more dangerous than German shepherds (G. R. Smith, personal communication, September 3, 2006.)

Sample 3 Smith stated, "Pit bulls are no more dangerous than German shepherds" (personal communication, September 3, 2006).

[Note: In a personal communication that is not written, such as an interview, do not use page or paragraph numbers with a direct quotation.]

Reference Page Citation

A personal communication is not listed in the references.

<u>Electronic text (e-text) authored by individuals specifically for an Apollo Group subsidiary (e.g., University of Phoenix, Axia College, Meritus University)</u>

An e-text authored by individuals could be formatted in any of the following ways:

In-Text Citation

Sample 1 Paul and Elder (2002) indicated that if we create our experience, then we are responsible for our lives.

Sample 2 We can control our experience (Paul & Elder, 2002).

Sample 3 Paul and Elder (2002) stated, "For most people, experience is understood as something that 'happens to them,' not something they create for themselves" (chap. 8, p. 131).

[Note: In the e-text, you may need to include the chapter to clarify the source.]

Reference Page Citation

Paul, R., & Elder, L. (2002). *Critical thinking: Tools for taking charge of your professional and personal life* [University of Phoenix Custom Edition e-text]. Upper Saddle River, NJ: Prentice Hall. Retrieved November 24, 2004, from University of Phoenix, GEN480—Interdisciplinary Capstone Course Web site.

<u>E-text that is a compilation of pieces of other works edited by an Apollo Group subsidiary (e.g., University of Phoenix, Axia College, Meritus University) as a completely new book</u>

An e-text that is a compilation of other works could be formatted in any of the following ways:

In-Text Citation

Sample 1 According to the University of Phoenix textbook (2002), educators need to pay attention to the environment in which learning takes place.

Sample 2 Environment can be an important factor in the learning process (University of Phoenix, 2002).

Sample 3 As stated in the textbook, "Social learning theorists stress the role of environmental factors in learning, but they acknowledge the importance of cognitive factors as well" (University of Phoenix, 2002, section 3, p. 358).

Reference Page Citation

University of Phoenix (Ed.). (2002). *Lifespan development and learning* [University of Phoenix Custom Edition e-text]. Boston: Pearson Custom Publishing. Retrieved November 26, 2003, from University of Phoenix, PSYCH/538—Lifespan Development and Learning Course Web site.

E-text from an electronic database (New Entry!)

An e-text could be formatted in any of the following ways:

In-Text Citation

Sample 1 According to Hlebowitsch (2005), macrocurriculum and microcurriculum are two levels of curriculum design.

Sample 2 Curriculum design has two levels, macrocurriculum and microcurriculum (Hlebowitsch, 2005).

Sample 3 Macrocurriculum embraces "the design of the all-school experience and concerns itself with building-level design factors, including the organization of courses across and within grade levels, school-wide mission features, and school-wide (extra-classroom) experiences" (Hlebowitsch 2005, p. 9).

Reference Page Citation (Note: A retrieval date is not needed. If the e-text is accessible from a site in its entirety, use "Retrieved from" and include the Web address to the book's location. If the e-text is accessible via download, then use "Available from" and include the name of the database or the source location.)

Hlebowitsh, P. S. (2005). *Designing the school curriculum*. Available from the University of Phoenix eBook Collection database.

<u>Online course materials</u>

Documents (e.g., lecture notes, syllabi, supplemental documents) listed in online course materials could be formatted in any of the following ways:

In-Text Citation

Sample 1 According to Axia College Week Three Supplement (2006), three major steps for analyzing sources exist.

Sample 2 A key question to ask is “Which source is strongest?” (Axia College, 2006, Week Three Supplement).

Reference Page Citation

Axia College. (2006). Week Three supplement: Appendix B. Retrieved March 13, 2008, from Axia College, Week Three, CRT/205—Critical Thinking Course Web site.

<u>Online forum messages, discussion groups, and newsgroups</u> <u>(New Entry!)</u>

An online forum message, discussion group message, or a newsgroup message could be formatted in any of the following ways (Note: Use caution when citing these sources in your academic work as these sources are not available to everyone, are not usually archived, and are not always academic. If a message is accessible for a limited time, then you should not consider it a reliable source.):

In-Text Citation

Sample 1 In Boardman’s (2008) Week Two forum message, he asked the students to answer, “Why do good people do bad things?” (para. 3).

Sample 2 As a follow-up question in the Week Two forum message, students were asked to explore the difference between effective and efficient communication for a scenario involving two scientists and their non-technical audience (Boardman, 2008).

Reference Page Citation

Boardman, B. (2008, April 15). Week two class notes [Msg. 3]. Message posted to University of Phoenix class forum, MGT/344—Organizational Behavior and Ethical Responsibility course Web site.

Podcasts (New Entry!)

Podcasts could be formatted in any of the following ways:

In-Text Citation

Sample 1 In Fogarty's (2007) podcast about the differences between *who* versus *whom*, she provided tips to determine which one should be used in a question.

Sample 2 This podcast explores the confusion of *who* versus *whom*, and the speaker reminds the listeners to use *who* when a person is the subject of the sentence (Fogarty, 2007).

Reference Page Citation

Fogarty, M. (Writer/Speaker). (2007, March 9). Who versus whom [Episode 44]. *Grammar Girl's Quick and Dirty Tips for Better Writing*. Podcast retrieved from http://grammar.quickanddirtytips.com/who-versus-whom.aspx

---

Video weblog posts (New Entry!)

A video post could be formatted in any of the following ways:

In-Text Citation

Sample 1 In an Internet video, Gore (2008) stated that 68% of the American population believes that human activity is a contributing factor in global warming.

Sample 2 This Internet video about global warming explores the urgency to "organize our response appropriately" to the climate crisis (Gore, 2008).

Reference Page Citation

Gore, A. (2008, April). TED Talks Al Gore: New thinking on the climate crisis [Video file]. Video posted to http://www.ted.com/talks/view/id/243

Simulations

Simulations could be formatted in any of the following ways:

In-Text Citation

Sample 1 In the University of Phoenix simulation (2004), students are allowed to apply theory to practice.

Sample 2 A situation providing a dilemma regarding confidentiality allows us to apply theory to practice (University of Phoenix, 2004).

Sample 3 This simulation states, “The three possible candidates all have strengths and weaknesses for this position” (University of Phoenix, 2004, para. 10).

Reference Page Citation

University of Phoenix. (2004). Keeping information confidential [Computer Software]. Retrieved September 26, 2004, from University of Phoenix, Simulation, COM525—Advanced Communications Management Course Web site.

Software

[Note: Reference entries are not needed for off-the-shelf software and programming languages. In the text, give the proper name of the software and the version number.]

Software could be formatted in any of the following ways:

In-Text Citation

Sample 1 The strength of ACI (2002) as a real estate appraising software program is its ease of use.

Sample 2 Because it is user friendly, many more real estate appraisers are using ACI (2002).

Reference Page Citation

ACI—The appraiser’s choice. (2002). (Version 0.0) [Computer software]. Retrieved November 3, 2004, from http://www.aciweb.com/p_aci.asp

---

<u>Television series</u>

A television series could be formatted in any of the following ways:

In-Text Citation

Sample 1 The *Seinfeld* series (Ackerman, 1989) presented a major, creative breakthrough in evening sitcoms.

Sample 2 The four main characters in *Seinfeld* represent people whom we all know (Ackerman, 1989).

Sample 3 One of George's famous sayings to Jerry is, "On some level, I have always been handicapped" (Ackerman, 1989).

Reference Page Citation

Ackerman, A. (Producer). (1989). *Seinfeld.* (Television series). New York: NBC.

<u>Team Toolkit</u>

Refer to the *Learning Team Toolkit* for information about formatting specific toolkit documents. Access *Toolkit Citations* from the homepage in the *Learning Team Toolkit* for sample reference entries.

Reference Page Citation

University of Phoenix. (2004). Learning team toolkit. Available on the University of Phoenix student/faculty website: http://ecampus.phoenix.edu (Retrieved May 10, 2008).

<u>Virtual Organizations</u>

Please use the following format to reference information found within the Virtual Organizations:

Apollo Group, Inc. (Latest copyright date). Virtual Organization Name. Title of Web page. Retrieval Date. Course Number and Name. URL

Reference Page Citation Example

Apollo Group, Inc. (2006). Riordan Manufacturing. Finance & accounting - overview. Retrieved March 28, 2007. CIS/319 – Computers and Information Processing. https://ecampus.phoenix.edu/secure/aapd/CIST/VOP/Business/Riordan/Finance/RioFandA001.htm

---

Referencing Figures (e.g., graphs, photographs) (New Entry!)

In APA style, the following types of illustrations are considered *figures*: pictures, photographs, graphs, art, drawings, or anything that is not a *table*. The *Publication Manual of the American Psychological Association* does not provide any specific information on how to reference a figure. However, the *APA Style Guide to Electronic References* (2007, p. 16) contains sample information about representing graphic data which can be used as an example in referencing any type of *figure*. You might want to check page 201 in the *Publication Manual* for a checklist about using figures in an essay. Here are some general principles for images retrieved from the Internet:

- For the author, use the photographer's or image creator's name if available or use the name of the organization or corporation.
- If no author information is available, use the title in the author's place.
- For the publication date, if no photo information is included, the last updated date for the Web site can be used.
- Place the image title in brackets, if provided; if not, create a short description in place of the title and include the figure type.

Reference Page Citation Example

Cable News Network. (2009). [Photograph of President Barack Obama and Vice President Joe Biden watching the inaugural parade outside the White House] *The 44th President Inauguration*. Retrieved January 20, 2009, from http://www.cnn.com/2009/POLITICS/01/20/obama.inauguration/index.html

102

Figure 2.1. Sample One-Experiment Paper (The numbers refer to numbered sections in the *Publication Manual.*)

Running head: EFFECTS OF AGE ON DETECTION OF EMOTION

Running Head on Title Page

Establishing a title, 2.01; Preparing the manuscript for submission, 8.03

Effects of Age on Detection of Emotional Information

Christina M. Leclerc and Elizabeth A. Kensinger

Boston College

Formatting the author name (byline) and institutional affiliation, 2.02, Table 2.1

Elements of an author note, 2.03

Author Note

Christina M.

Boston College.

This researcl

awarded to Elizabetl

Corresponde

Department of Psycl

Avenue, Chestnut H

Heading for remaining pages

EFFECTS OF AGE ON DETECTION OF EMOTION

page number

2

Abstract

Writing the abstract, 2.04

Age differences were examined in affective processing, in the context of a visual search task. Young and older adults were faster to detect high arousal images compared with low arousal and neutral items. Younger adults were faster to detect positive high arousal targets compared with other categories. In contrast, older adults exhibited an overall detection advantage for emotional images compared with neutral images. Together, these findings suggest that older adults do not display valence-based effects on affective processing at relatively automatic stages.

Keywords: aging, attention, information processing, emotion, visual search

Key word-formating

Double-spaced manuscript, Times Roman typeface, 1-inch margins, 8.03

Paper adapted from "Effects of Age on Detection of Emotional Information," by C. M. Leclerc and E. A. Kensinger, 2008, *Psychology and Aging, 23,* pp. 209–215. Copyright 2008 by the American Psychological Association.

First Page

Notice that they title on the first page is not bolded. See headings for more guidance on how to format heading levels throughout your report.

The title should be centered on the page, typed in 12-point Times New Roman Font. It should not be bolded, underlined, or italicized.

VARYING DEFINITIONS OF ONLINE COMMUNICATION 3

Varying Definitions of Online Communication and

Their Effects on Relationship Research

The title of the paper is centered and not bolded.

The introduction presents the problem that the paper addresses. See the OWL resources on introductions: http://owl.english.purdue.edu/owl/resource/724/01/

Numerous studies have been conducted on various facets of Internet relationships, focusing on the levels of intimacy, closeness, different communication modalities, and the frequency of use of computer-mediated communication (CMC). However, contradictory results are suggested within this research because only certain aspects of CMC are investigated, for example, email only. Cummings, Butler, and Kraut (2002) suggest that face-to-face (FtF) interactions are more effective than CMC (read: email) in creating feelings of closeness or intimacy, while other studies suggest the opposite. To understand how both online (Internet) and offline (non-Internet) relationships are affected by CMC, all forms of CMC should be studied. This paper examines Cummings et al.'s research against other CMC research to propose that additional research be conducted to better understand how online communication affects relationships.

If an article has three to five authors, write out all of the authors' names the first time they appear. Then use the first author's last name followed by "et al."

In-text citations

Abstract

The abstract serves as a summary of your report. IT IS NOT AN INTRODUCTION. Therefore, it should be one of the final pieces you write AFTER completing your report.

VARYING DEFINITIONS OF ONLINE COMMUNICATION 2

The word "Abstract" should be centered and typed in 12 point Times New Roman. Do not indent the first line of the abstract paragraph. All other paragraphs in the paper should be indented.

Abstract

The abstract is a brief summary of the paper, allowing readers to quickly review the main points and purpose of the paper.

The abstract should be between 150-250 words. Abbreviations and acronyms used in the paper should be defined in the abstract.

This paper explores four published articles that report on results from research conducted on online (Internet) and offline (non-Internet) relationships and their relationship to computer-mediated communication (CMC). The articles, however, vary in their definitions and uses of CMC. Butler and Kraut (2002) suggest that face-to-face (FtF) interactions are more effective than CMC, defined and used as "email," in creating feelings of closeness or intimacy. Other articles define CMC differently and, therefore, offer different results. This paper examines Cummings, Butler, and Kraut's (2002) research in relation to three other research articles to suggest that all forms of CMC should be studied in order to fully understand how CMC influences online and offline relationships.

Keywords: computer-mediated communication, face-to-face communication

3.03 Levels of Heading

The heading style recommended by APA consists of five possible formatting arrangements, according to the number of levels of subordination. Each heading level is numbered (see Table 3.1).

Regardless of the number of levels of subheading within a section, the heading structure for all sections follows the same top-down progression. Each section starts with the

Table 3.1. Format for Five Levels of Heading in APA Journals

Level of heading	Format
1	**Centered, Boldface, Uppercase and Lowercase Heading**[a]
2	**Flush Left, Boldface, Uppercase and Lowercase Heading**
3	**Indented, boldface, lowercase paragraph heading ending with a period.**[b]
4	***Indented, boldface, italicized, lowercase paragraph heading ending with a period.***
5	*Indented, italicized, lowercase paragraph heading ending with a period.*

[a]This type of capitalization is also referred to as *title case*. [b]In a *lowercase paragraph heading*, the first letter of the first word is uppercase and the remaining words are lowercase.

Figures

Label all Charts & Figures

For figures, make sure to include the figure number and a title with a legend and caption. These elements appear **below** the visual display. For the figure number, type *Figure X*. Then type the title of the figure in sentence case. Follow the title with a legend that explains the symbols in the figure and a caption that explains the figure:

Figure 1. How to create figures in APA style. This figure illustrates effective elements in APA style figures.

Captions serve as a brief, but complete, explanation and as a title. For example, "*Figure 4*. Population" is insufficient, whereas "*Figure 4*. Population of Grand Rapids, MI by race (1980)" is better. If the figure has a title in the image, crop it.

Graphs should always include a legend that explains the symbols, abbreviations, and terminology used in the figure. These terms must be consistent with those used in the text and in other figures. The lettering in the legend should be of the same type and size as that used in the figure.

Label tables and figures in the appendix as you would in the text of your manuscript, using the letter *A* before the number to clarify that the table or figure belongs to the appendix.

Table A1

Description of HomeNet Studies by Year

Year of Study	Contents of Study
1995-1996	93 families in Pittsburgh involved in school or community organizations
1997-1999	25 families with home businesses
1998-1999	151 Pittsburgh households
2000-2002	National survey

Reference Figure or Chart in the body of your text so your reader can be sure to look at the correct figure.

Appendix

Place any larger item (i.e. chart, figure or research) in the Appendix in the back of your report placed after your reference list. Each appendix should be labeled – A, B, C. Be sure to refer to the Appendix in the body of your text so your reader knows which one to look at.

VARYING DEFINITIONS OF ONLINE COMMUNICATION 10

Appendix A

The HomeNet Project

Started at Carnegie Mellon University in 1995, the HomeNet research project has involved a number of studies intended to look at home Internet usage. Researchers began this project because the Internet was originally designed as a tool for scientific and corporate use. Home usage of the Internet was an unexpected phenomenon worthy of extended study.

Each of HomeNet's studies has explored a different facet of home Internet usage, such as chatting, playing games, or reading the news. Within the past few years, the explosion of social networking has also proven to be an area deserving of additional research. Refer to Table A1 for a more detailed description of HomeNet studies.

The first paragraph of the appendix should flush with the left margin. Additional paragraphs should be indented.

Begin each appendix on a new page., with the word appendix in the top center. Use an identifying capital letter (e.g., Appendix A, Appendix B, etc.) if you have more than one appendix. If you are referring to more than one appendix in your text, use the plural *appendices* (APA only).

Presentation

Presentations

Senior Project Expo: Posters

Students on the Klamath Falls campus will participate in the Senior Project Expo in the Spring term. This provides you with an opportunity to share your project with your sponsor, the community, family, friends and faculty.

An Effective Poster

An effective poster will help you engage colleagues in conversation and get the main points across to as many people as possible. An effective poster operates on multiple levels:

- source of information
- conversation starter
- advertisement of your work
- summary of your work

An effective poster is not just a standard research paper stuck to a board. A poster uses a different visual grammar. It shows, not tells. Quality posters will:

- Focus on a main message
- Let graphs and images tell the story; uses text sparingly.
- Keeps the sequence well-ordered and obvious.

More information to help create a professional poster:
https://www.ncsu.edu/project/posters/index.html

(Hess, Tosney, Liegel. 2013. Creating effective poster presentations. Retrieved from https://www.ncsu.edu/project/posters/index.html)

Poster Sections
The following section are only suggestions for your poster. Your project should guide the organization of your poster.

- Title
- Introduction
- Methods
- Results
- Discussion of results
- Conclusions
- References

Poster Logistics & Templates
Most students will use PowerPoint to create a poster. You will select a PP template from one of the links below.

- Size: 36 x 48
- Power Point Templates:
    - Create poster in powerpoint from scratch: http://guides.lib.unc.edu/c.php?g=8592&p=44029
    - Poster templates: http://www.makesigns.com/SciPosters_Templates.aspx
    - More power point poster templates: "powerpoint template for scientific posters" OR "powerpoint templat…

Printing:

- ITS Helpdesk on Campus
- Jeff at Klamath Builders Exchange, 724 Main Street, Suite 206, Klamath Falls
  541-882-9480
  Hours- day only, not evenings (no weekends)
- Staples (ask for basic paper)
- Approximate cost $10-15

Save your power point in **PDF format** and then bring it on a flash drive

Presenting Your Poster

Making the poster is only part of preparing for a poster session. Interacting with the audience demands thinking on your feet, applying your social skills, and drawing on short, concise explanations about key points of your project.

- Practice two to three summaries of your presentation.
- Make sure you can sum up your poster's key points and conclusions in two to three sentences. Focus your efforts on the charts and visuals.
- Anticipate people's questions and how you will answer them. Keep in mind that you should not be talking AT your audience, rather a poster session allows for a TWO-SIDED conversation about your work. So let your audience ask questions.
- Think about which parts of your poster will be the most challenging to explain.
- This is also a great opportunity to engage your audience about your career goals. Don't hesitate to bring copies of your resume to pass out.
- Thank people for listening and talking with you about your project: Make your comment show YOU WERE LISTENING TO THEM, not just talking at them.
- The following videos provide some background information professionally present your poster: **https://www.youtube.com/watch?v=vMSaFUrk-FA**

Presentations

For online students we share our projects via an online video conference platform called ZOOM. This is a live presentation of your power point on your computer. This platform allows us to all see each other as well as sharing our computer screens. For audio you can use the microphone on your computer, a headset or you can call in on your phone. Directions for how to log on will be sent by your instructor prior to the session. It is easy to use.

You should prepare a power point (or prezi) presentation about your project. It should be about 10 to 15 minutes in length. Cover the main topics of your project. Most students follow the outline of their project report. You all will be able to ask questions of each other during this session. Students generally find it a great way to interact and share the work they accomplished.

Social Media

The Business-Management Department at Oregon Tech love to promote the great work of our students. One way we do this is by posting about your senior project on Facebook. During the class, you will have an assignment in which you will create a social media post to promote your project. Your post should:

- Include your name and major
- BRIEFLY summarize your project using business terms
- Include an engaging photo
- Mention the poster session, if applicable

The Facebook page can be found at https://www.facebook.com/Oregon-Tech-Management-Department-141325835964121/?ref=aymt_homepage_panel.

Here are some examples:

Derek Scott, a Marketing major at Oregon Tech, has been working for filmmaker/professor Mark Neupert to market his film “Cobblestone Stories.” The film explores the relationship between the people of Leiden, the Netherlands and their old urban environment. Derek’s project focused on developing a marketing kit for the film which includes a website, social media sites, copyright protection and distribution plan. Senior projects are designed to challenge students with real world management problems, as well as give them the opportunity to gain industry experience prior to graduation. Learn more about his results at the Business-Management Senior Expo on March 9th from 4:30-6:30pm in the College Union.

Eli Gahringer & Natalie Ross, seniors in the Small Business/Entrepreneurship and Marketing programs at Oregon Tech, have teamed up to address the underutilized potential of the local Klamath Falls skate park, considered one of the top skate parks in the nation. The project's goal is to bring the facility back to life and produce a plan to ensure local stakeholder support to sustain this significant community asset. They are also developing a plan to show the potential that this park can add to the community in form of sports tourism. Senior projects are designed to challenge students with real world management problems, as well as give them the opportunity to gain industry experience prior to graduation. Learn more about their results at the Business-Management Senior Expo on March 9th from 4:30-6:30pm in the College Union.

Operations Management major, Steve Hester, worked with Sutherlin Oregon's Inland Empire Foods to create a product launch plan for their new online commerce website for his senior project. This included outlining the proposed website, designing packaging, completing a detailed cost and risk analysis, and creating a project timeline to guide the launch. Beginning this fall, Inland Empire will use this launch plan to begin direct to the consumer sales of their delicious line of dehydrated legume products at Gardenvalleyfoods.com. Check it out!

William Rutledge, a Small Business/Entrepreneurship major at Oregon Tech, is completing his senior project in collaboration with Zackery Cundiff, the owner of Kingsley Outfitters, which is an up-and-coming hunting guide service based in Klamath Falls. This project focuses on market entry and functions for this brand new business, including identifying core competencies, conducting a SWOT analysis, and identifying target markets. Senior projects are designed to challenge students with real world management problems, as well as give them the opportunity to gain industry experience prior to graduation. Learn more about his results at the Business-Management Senior Expo on March 9th from 4:30-6:30pm in the College Union.

April Schneider, a Health Care Management major at Oregon Tech, has been completing her senior project with Shasta Community Health Center. The focus of this project is on the implementation of a centralized check-in and patient quality improvement measures. April finds it is a great opportunity to work with SCHC, as is it ranked as one of the top 1% of health centers in the United States by the Health Resources and Services Administration. Senior projects are designed to challenge students with real world management problems, as well as give them the opportunity to gain industry experience prior to graduation. Learn more about their results at the Business-Management Senior Expo on March 9th from 4:30-6:30pm in the College Union.

Oregon TECH

Career Development

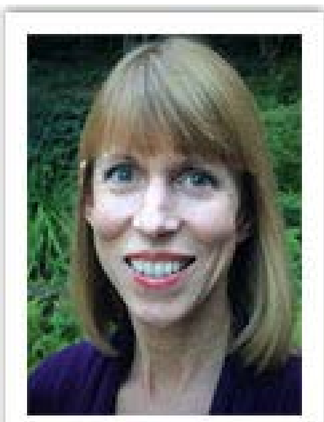
Career Development

As you near graduation it is important to learn, or polish up, your career development skills. Because these skills are not intuitive, you must learn and practice them. Therefore, we will spend some time development them during your senior project courses so you can put your best foot forward after graduation.

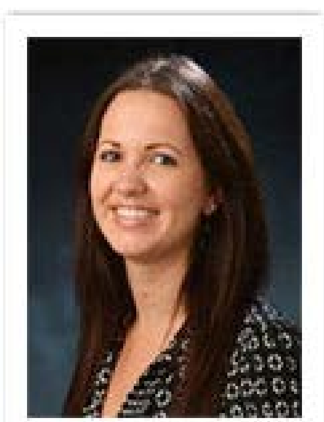
Career Services

Oregon Tech's Career Services helps students develop and advance their careers. They can aid you in a wide range of services such as career exploration, resume and cover letters, networking, LinkedIn, interviewing and career opportunities. Oregon Tech alumni have access to these services throughout their career following graduation.
The majority of this section of your senior project guide is taken directly from the Oregon Tech Career Development site at http://www.oit.edu/career-services. It is full of useful and practice career resources.

You are encouraged to reach out and work with the professionals at Career Services:



Jennifer Kass, Director of Career Services
Wilsonville Campus, Student Services
503-821-1155
Jennifer.Kass@oit.edu
Jennifer has an MBA and an MA in Counseling, plus 20+ years working in corporate and consulting environments. She now helps students and alumni to formulate and achieve their career goals. Jennifer is the primary contact for Wilsonville/Online/Other Campuses.



Sarah Moore, Assistant Director of Career Services
LRC 219B, Klamath Falls Campus
541-885-1023
Sarah.Moore@oit.edu
Sarah is the primary contact for the Klamath Falls campus. She has a Master's degree in Education and Human Resource Studies with a specialization in Counseling and Career Development from Colorado State University. Her professional experience includes working in Career Services at a community agency and two universities, and also corporate training and development for Whole Foods. She is adventurous and loves the outdoors, and is looking forward to helping students advance their careers.

Job Fairs/Job Postings

Each year Career Services invites a wide range of employers to the Klamath and Wilsonville Campuses to recruit students. These are great opportunities to interact with employers to learn about job prospects and internships in your field. Typically, these fairs happen in the fall and winter terms. Career Services also has active postings of on and off campus jobs year round on their website. You can register for the fair and search for jobs at the Jobs4Owls website http://www.oit.edu/career-services/students/working-on-campus/instructions-jobs4owls.

Resume & Cover Letter

The purpose of a resume and cover letter is to land you an interview (not the job). The main concept to understand about a resume and cover letter is that they are marketing documents incorporating all of your related experience, not just a list of your prior jobs. You are tailoring your message about your qualifications to a target audience (the hiring manager) who has a specific position to fill. The easier you make it for them to understand how you can meet their needs, the more likely you are to get the interview. You are welcome to make an appointment with Career Services to have it reviewed in person or over the phone.

Oregon Tech's Resume and Cover letter page: http://www.oit.edu/career-services/students/resume-cover-letter

Cover letter Success Tips: http://www.oit.edu/career-services/students/resume-cover-letter/cover-letter-success-tips

Also see Appendix for Resume Tips for Management Majors & Action Verbs.

Dear Hiring Manager:

While browsing the Intel website, I saw a posting for a Data Center Intern in the Jobs at Intel section. A career with Intel has been long-time aspiration because your reputation for innovation is unmatched. I believe my combination of education and experience would enable me to quickly contribute to Intel's mission.

I am currently finishing my sophomore year of a **BS in Information Technology** at Oregon Tech Wilsonville, taking a full course load and maintaining a strong GPA while also working part-time to help finance my education. Working with faculty who are industry experts, I have had the opportunity to hone my skills in **database systems, network and system administration and information security**. With this knowledge I am able to operate in a **data center environment** and comprehend system optimization and security principals on **Windows servers**. Oregon Tech's programs are intensive, hands-on learning using the latest equipment and technology, and my courses challenge me every day. In addition, I am a US military veteran with extensive experience working under very challenging circumstances while deployed overseas.

Our rigorous curriculum requires students to learn quickly and troubleshoot on a regular basis. In a course project (describe **problem-solving achievement in course project**). In the military, I also was required to learn complex technology quickly and apply that knowledge in the field under very complex situations.

My experience and technical skills are detailed in the attached resume, and I look forward to having the opportunity to discuss how I could contribute to Intel in more detail.

Sincerely,

Jonathan Favero

Interviewing

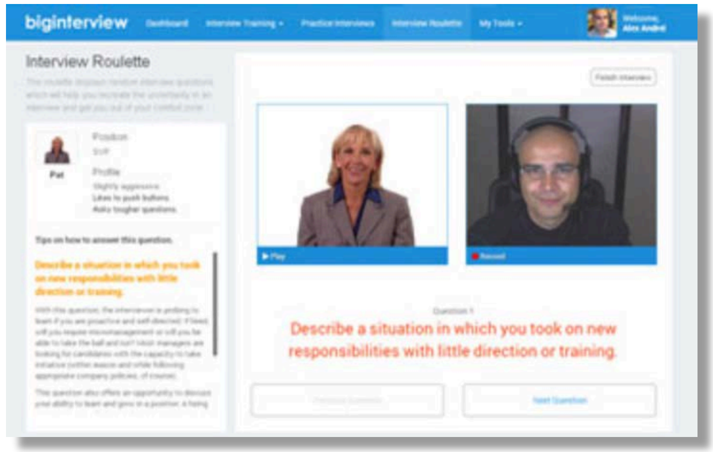
Interview skills must be practiced. There are lots of opportunities to practice prior to graduation. Participation in a mock interview session is one of the best ways to prepare. While a mock interview session is conducted on the Klamath Campus, Career Services also has resources in which you can practice interviewing.

Here are some helpful hints to prepare for an interview:

- **Overview**: Here is a video about what to expect at a mock interview session: https://www.youtube.com/watch?v=lSsDG1k26nk

- **Be a good interviewer**: The key to being a good interviewer is to answer every question with **an example**. So instead of just answering "I'm a hard worker, " actually provide an example of your work. Remember, an employer wants evidence that you can do the job, not just your word. So provide the evidence by providing examples. Here are some common interview questions that you can practice:
    - Tell me about yourself.
    - What are your strengths?
    - What are your weaknesses?
    - Where would you like to be in your career five years from now?
    - Tell me about your proudest achievement.
    - Have you ever been on a team where someone was not pulling their own weight? How did you handle it?
    - What is your greatest failure, and what did you learn from it?
    - What's the most difficult decision you've made in the last two years and how did you come to that decision?
    - Share an example of how you were able to motivate others.
    - How do you handle a challenge? Give an example.
    - What can you do for us that other candidates can't?
    - What were the responsibilities of your last position?
    - What do you know about our company?
    - Do you have any questions for me?

- **PRACTICE**: The best way to be prepared for an interview is to practice. While we do conduct mock interviews on the Klamath Falls campus, Career Services now has a new platform, called Big Interview, to become skilled at interviewing. You can access this service at https://oit.biginterview.com/.



- **Professional Dress/Grooming**: You are expected to be professionally dressed for an interview. If you are unsure, See Appendix for guidance provided by career services- WhattowearMen.pdf WhattowearWomen.pdf

- **Research the Company and the Interviewers**: While this will not apply for Mock interviews, you are expected to come to the interview having researched the company as well as the interviewers. When the interviewers ask if you have questions, this is a great opportunity to ask well researched questions about the company.

- **Thank you notes**: Following the interviews, you are expected to send an e-mail thank you note to your interviewer. This is a great opportunity to follow up on something discussed during the interview.

SUBJECT LINE: Interview Follow-up & Thanks

Dear Mr./Ms. Last Name,

I enjoyed meeting you yesterday and learning more about your research and design work at PEG. Thank for the opportunity to interview for your process engineer position. My conversations with you and with the engineering team have confirmed my interest in the position as well as the company.

I want to convey my strong interest in joining your team. My education and internship experiences have prepared me for this role, and I am eager to apply what I've learned to help with your upcoming projects. I hope there will be an opportunity to continue our discussions.

Sincerely,
Your Name
000.000.0000

Elevator Pitch

An elevator pitch is short and memorable summary that can spoken in about 30 seconds (the length of an elevator ride). Preparing an elevator pitch can really come in handy. It can be helpful while you are networking or attending a job fair so you can quickly introduce yourself with some key points. Also the first question you will likely get at an interview is "Tell me about yourself" which is often an expanded version of your elevator pitch.

Here are some helpful hints on preparing an elevator pitch:

1. A good pitch answers three questions: Who are you? What do you do? What are you looking for?
2. Clarify your field and job type you are pursing, as well as the key skills, accomplishments and experiences that are relevant.
3. Tailor the pitch to them, not you.
4. Practice!

Find additional information and samples at: http://gsm.ucdavis.edu/resource/elevator-pitch

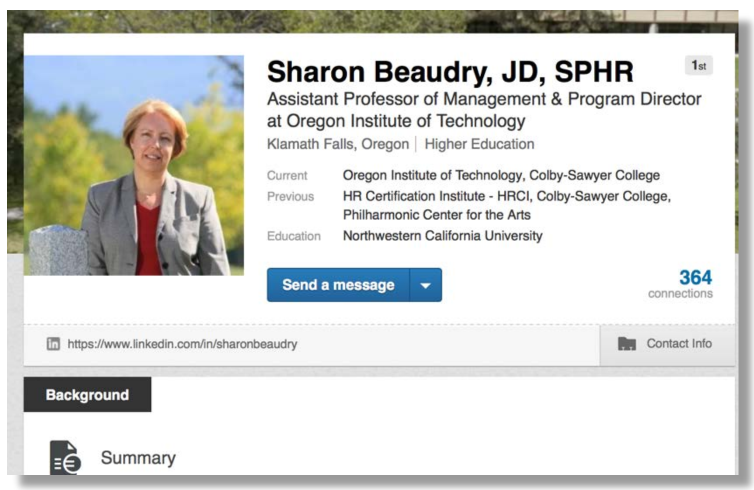
Professional Portfolio

A professional portfolio is an effective way extend your resume and show the employer the quality of your work. It is an opportunity to share your senior project, other school work, volunteerism and accomplishments. The purpose of a career portfolio is to highlight your actual work/projects so prospective employers can see your capabilities beyond your resume. It should highlight your best work, so be selective. It typically includes your resume along with at least five of the following items:

- Current resume
- A short professional biography or cover letter
- Examples of successful presentations, projects, writing samples (papers) (i.e. senior project poster, client memos etc.)
- Letters of recommendations (always ask for permission)
- Awards and recognitions
- Community service/volunteer work
- Articles mentioning your name (i.e. sports or school project)

A professional portfolio can be presented in a number of formats:

LinkedIn



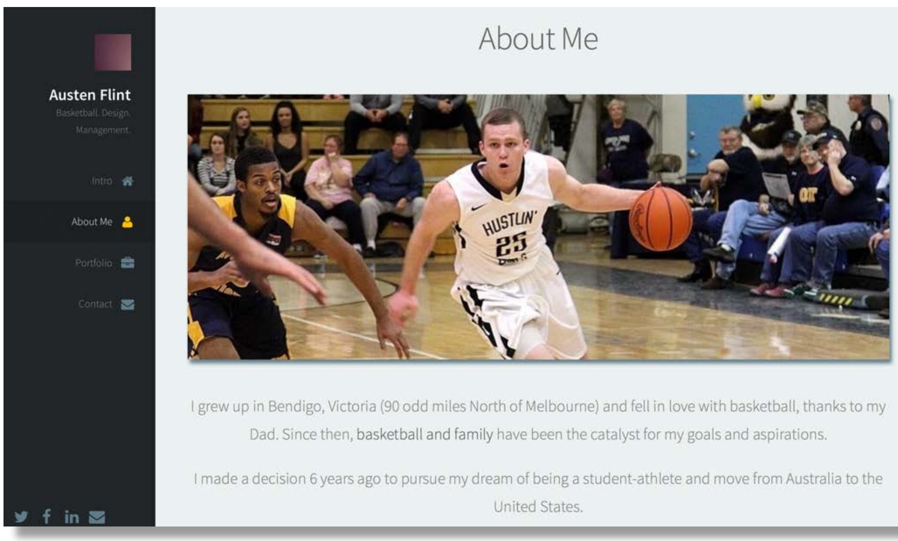
Beyond just creating a basic profile on Linkedin, boost your professional appearance by adding career portfolio items such as projects, writing samples, presentations, videos, volunteer work and more to your account. The advantage is LinkedIn is that it is also a very effective way to network. Career Services hosts a LinkedIn Lab each term. See more at:

- http://www.socialmediaexaminer.com/linkedin-professional-portfolio/
- https://students.linkedin.com
- Recent example

E-Portfolio

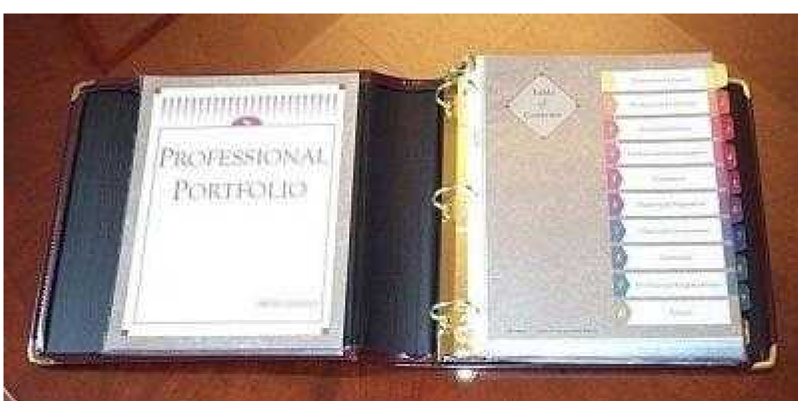
An e-portfolio is a website created on a platform such as weebly.com or www.portfolium.com. This option gives you the opportunity to expand beyond LinkedIn to present a more tailored look and feel. The benefit of using Portfolium is that it is searched by employers similar to LinkedIn. Here are some examples:

- http://austenflint.com
- http://aupadhyay.weebly.com



Traditional Portfolio

A traditional career portfolio can be created using a black 1-inch binder with divider tabs and plastic sheet protectors. This is something you will be using to discuss your accomplishments in an interview so be sure it is professionally presented.



Oregon TECH

Resume Tips for Management Majors

Employers are seeking candidates who have the skills, knowledge, and experience that match the job, Help them see that you are a good fit by keeping your resume focused, descriptive, and interesting, and make sure that you customize it for each opportunity. You can customize by changing the Summary, and/or by moving sections around depending on what is most important to the employer.

1. CONTACT INFORMATION

Include your name in a larger bold font (16 or 18 pt). Underneath your name, using as few lines as possible, add your address, telephone number, email, and your LinkedIn URL if you have one. If you are relocating, do not include your current address as employers may think you do not want to relocate.

Brian Jones

10230 SW Barnett Road, Portland OR 97235 brian.jones@gmail.com 503.249.8874

OR

Brian Jones

brian.jones@gmail.com www.linkedin.com/in.brianjones 503.249.8874

2. PROFILE or SUMMARY

This initial section is where you communicate both *what* you are seeking and a few of your *key strengths* related to the position you are seeking. Many employers see Objectives as outdated, so try a Profile or Summary instead (but include your objective in the Summary). A Summary of Qualifications is great for those with more experience (see sample).

Summary

Management / Marketing junior at Oregon Tech with coursework in (X and Y) and experience writing press releases seeking summer internship position at (name of company).

3. EDUCATION

List your education next. Include minor, specialization, emphasis or area of interest, and your GPA if it's a strength. Are you a student athlete or member of a club? Are you Six Sigma Green Belt certified? Did you receive a scholarship? On a pre-career resume, consider listing your relevant coursework too.

EDUCATION

Oregon Institute of Technology (Oregon Tech), Wilsonville OR

Bachelor of Science in Management / Marketing June 2016

GPA: 3.4 Major GPA: 3.7 Dean's List – two quarters

RELEVANT COURSEWORK:

Finance, Business Law, Business Research Methods, Integrated Marketing Communications

Rather than a list of individual courses, you may include educational accomplishments:

SKILLS, KNOWLEDGE AND ACCOMPLISHMENTS IN MANAGEMENT / MARKETING

- Developed integrated marketing campaign for a new product launch.
- Created an Excel spreadsheet to analyze the pricing and sales of two software programs.
- Analyzed consumer segmentation data to understand unmet needs in the power tool category.

4. PROJECTS / RESEARCH

Particularly for those embarking on a new engineering career, projects are a very important way to show your **applied knowledge**. Include all related projects, including those you have done on your own.

Working on a **senior project** is a huge commitment and a considerable accomplishment. You should have as much about this on your resume as you do about work experiences. You may include it in separate Projects section, or you may put it in your Experience section, since it is so similar to what you might accomplish in a work setting. Other less significant projects would be included in a Projects section. Discuss what you accomplished, and the skills and technology you used to get there.

SENIOR PROJECT – Oregon Tech
ZipIt Snack Delivery Business

- Created a small business targeting Oregon Tech students and parents. Students and parents can order snack boxes during exam times and have them delivered to student residences.
- Wrote and executed a business plan including registering the business, obtaining financing, researching consumer needs, creating packaging, hiring staff, troubleshooting operations.
- Developed and executed an integrated marketing plan including social media marketing.

Employers place a high value on **team projects**. In industry, you will need to interact effectively with other engineers, vendors, contractors, and support staff. Indicating projects in which you are a contributing member of a team reflects valued and needed skills.

TEAM PROJECTS – Oregon Tech
Sales and Sales Management

- Worked with a diverse team to create a sales presentation in PowerPoint directed at senior buyers for a construction equipment distributor.
- Presented to a group of students and faculty, and practiced overcoming objections and negotiation tactics.

5. EXPERIENCE

Use short, descriptive bullet points that begin with action verbs e.g., designed, improved) and highlight responsibilities, skills, and accomplishments. Explain how your work added value to the company and quantify results whenever possible. You can highlight either the position or the company, whichever you think is more important.

MANAGEMENT EXPERIENCE
Folio Graphics, Wilsonville OR
Web Administrator — Summer 2014

- Reorganized main website to ensure integrity.
- Designed user interface for transferring paper process to web, increasing customer base by 15%.

OR

Starbucks, Medford OR
Shift Supervisor — 2013 - 2014

- Promoted to supervisor after six months.
- Opened and closed the location, reconciling a cash drawer of up to $2,500 daily.
- Contributed to hiring, termination and other human resources decisions.

Experience less related to management may still convey many positive aspects of you as a candidate to employers. Whatever experience you have that conveys your strengths, include it in sections such as **Additional Experience** or **Military Service**.

6. SKILLS

This is the place to put "hard" skills, rather than soft skills such as communication or interpersonal skills. These are also valuable, but would be demonstrated in bullet points for your experiences, and in how well you communicate in your application, and your interview.

SKILLS
Applications: Macromedia Dreamweaver, Adobe Photoshop, Illustrator, Microsoft Office (highly proficient in Excel), and Microsoft Outlook
Operating Systems: Microsoft Windows, Apple OS X
Language: Proficient in Spanish

7. CERTIFICATIONS

Certifications such as Six Sigma Greet Belt should be included in a separate section. Associated project management skills may be included in your Skills section.

8. LEADERSHIP / INVOLVEMENT / AFFILIATIONS

Include any involvement in student clubs, professional organizations, and community activities. Be sure to highlight **leadership** roles or positions of responsibility. If extensive, include a separate section. If less extensive and all related to Oregon Tech, you may include in your Education section.

Leadership and Involvement
Oregon Tech Broadcasting (member) 2013-2014
A student-run digital media program promoting campus culture and visual media through hands-on student production.

General Resume Tips:

- Be organized, and consistent in the format of how you describe experiences
- Balance your use of text, bullets, blank space and margins
- Begin all bullets with action verbs; past tense verbs for past accomplishments
- Do not use I, me, my (they are understood)
- Do not include references or "References on request" – it's assumed
- Within each section, use reverse chronological format
- One page if possible, two is acceptable if you can take up at least half of the second page
- Use boldface and italics selectively to highlight important information; avoid underlining
- NO typos – get someone else to proofread for you
- Follow the guidelines to make sure your resume is properly read by applicant tracking systems (see separate handout)

Chris Nguyen

(805) 544-1234 www.linkedin.com/in/chrisnguyen chris.nguyen@gmail.com

SUMMARY OF QUALIFICATIONS

- 3+ years' work experience including being promoted into supervisory roles.
- Project management experience using Excel and Access.
- Experience leading and working on diverse cross-functional teams.
- Extensive experience with customer service and sales techniques; strong interpersonal skills.

EDUCATION

Oregon Institute of Technology (Oregon Tech), Klamath Falls OR
Bachelor of Science in Operations Management June 2015
Major GPA: 3.6 Overall GPA: 3.4 Dean's List – 4 quarters

Related Coursework:
Lean/Six Sigma Management I, II, III; Project Management; Advanced Technical Writing; Business Research Methods I, II; Organizational Behavior, Materials Management, Quality Management.

INTERNSHIP

Northwest Paper Box Manufacturers, Medford OR
Operations Intern Summer 2014

- Contributed to a new system using Excel to streamline the budgeting process for new projects.
- Reorganized inventory system to prevent material shortages while minimizing on-hand inventory.
- Gave several presentations to upper management, supervisors, and team members.

SENIOR PROJECT

Student Sustainability Group, Oregon Tech 2014 – present

- Developing a management tool using Microsoft Excel and Access to help reduce solid and electronic waste on campus. Departments regularly have leftover supplies that go to waste that could be used by others on campus.
- This project will create a database of surplus inventory, an internal financial system for transfer of assets, and a communications strategy to help promote its use.

GROUP PROJECTS – Oregon Tech

- Developed alternative layouts for C&D Aerospace's Dado Assembly Area while optimizing man hours and material flow.
- Created Material Requirements Planning Program for three product structures containing parts with independent and dependent demand.

SKILLS

Software: Microsoft Office: Advanced proficiency in Access; Proficient in Excel, Word, PowerPoint. Basic knowledge of Outlook.
Languages: Bilingual Vietnamese/English; Conversational Spanish.

WORK EXPERIENCE

Server, Pho Hong, Klamath Falls OR 2013 - 2014

- Worked 20-25 hours per week while attending school full-time.
- Promoted to shift supervisor.

Adapted, enlarged list inspired by Employment Development Department of Palo Alto, CA

Management skills	**Communication skills**	**Clerical or detailed skills**
administered	addressed	approved
analyzed	arbitrated	arranged
assigned	arranged	catalogued
attained	authored	classified
chaired	corresponded	collected
contracted	developed	compiled
consolidated	directed	dispatched
coordinated	drafted	executed
delegated	edited	generated
developed	enlisted	implemented
directed	formulated	inspected
evaluated	influenced	monitored
executed	interpreted	operated
improved	lectured	organized
increased	mediated	prepared
organized	moderated	organized
oversaw	motivated	prepared
planned	negotiated	processed
prioritized	persuaded	purchased
produced	promoted	recorded
recommended	publicized	retrieved
reviewed	reconciled	screened
scheduled	recruited	specified
strengthened	spoke	systematized
supervised	translated	tabulated
	wrote	validated

Research skills	Technical skills	Teaching skills
clarified collected critiqued diagnosed evaluated examined extracted identified inspected interpreted interviewed investigated organized reviewed summarized surveyed systematized	assembled built calculated computed designed devised engineered fabricated maintained operated overhauled programmed remodeled repair solved trained upgraded	adapted advised clarified coached communicated coordinated developed enabled encouraged evaluated explained facilitated guided informed initiated instructed persuaded set goals stimulated

Financial skills	Creative skills	Helping skills
administered allocated analyzed appraised audited balanced budgeted calculated computed developed forecasted	acted conceptualized created designed developed directed established fashioned founded illustrated instituted	assessed assisted clarified coached counseled demonstrated diagnosed educated expedited facilitated familiarized

managed marketed planned projected researched	integrated introduced invented originated performed planned revitalized shaped	guided referred rehabilitated represented

THINGS TO KEEP IN MIND:

- Find out how your organization defines business casual
- One organization's business casual may be another's business professional
- Stick with classic, rather than trendy, clothes
- You should look appropriate for a chance meeting with a CEO, a supervisor, or an administrator
- You should not look like cocktail, party, or picnic attire
- Should be clean, well pressed, and not show wear
- Present yourself as a professional - research what is appropriate business attire in your field.
- Dress for the interview, not a party
- Don't distract the interviewer's attention; it should be on what you have to say, not your appearance
- Arrive early and check out your appearance
- A smile, a firm handshake, and a positive attitude make a good first impression

CAREER SERVICES

Learning Resource Center 228
Phone: 541.885.1020
Fax: 541.885.1022
Email: career@oit.edu

Check our job listings on Oregon Tech Career Services Online

Services we offer:

- Federal work-study, on-campus, part-time, internship and career opportunities posted specifically to Oregon Tech students and alumni on Career Services Online.
- Individual career advising and assessment
- Resume and cover letter consultations
- Mock interviews
- Job search assistance
- Workshops and classroom presentations
- On-campus interviews

We offer lifetime

Career Assistance to

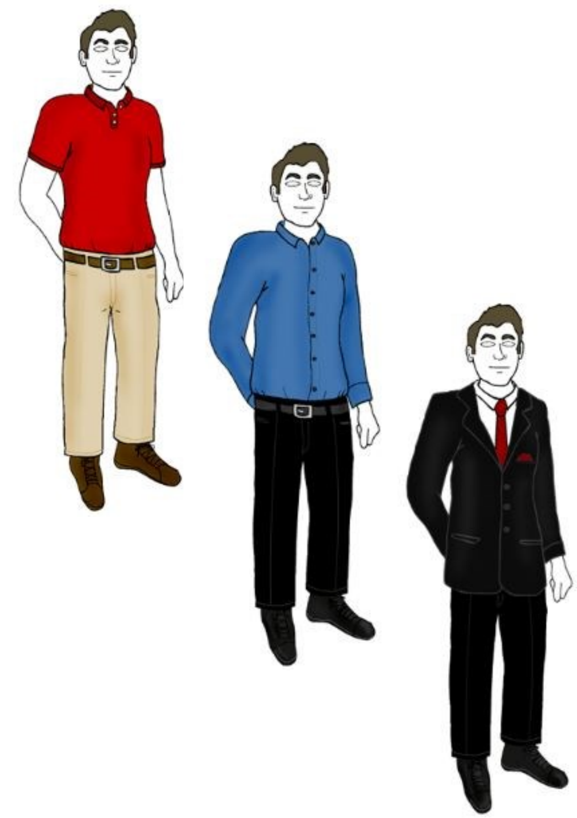
ALL Oregon Tech

Alumni!

Dressing for Success:
What to Wear for Interviews and Job Fairs

Oregon TECH
Career Services
Empowering Student Success!

A Brochure for the Gentlemen Sponsored by Career Services



You get one chance to make a first impression.

What TO and NOT TO Wear for your interview or to a Job Fair.

Shirts

For a Job Fair a clean, single color polo shirt without designs or logos may be appropriate.

Dress shirts are always appropriate!

- Long sleeves only
- Fabrics
  - 100% easy-care cotton
  - Cotton/polyester blend
- White is conservative, the least controversial color; Light or Pale Blue is also acceptable
- Wear a short-sleeve, plain white T-shirt under your shirt

Make sure your shirt is clean, wrinkle (or crease) free, and shows no sign of stains or odors.

Other colors and patterns (i.e. stripes or plaids) can be acceptable as long as they are not loud, bright or obnoxious.

A Few Do's and Don'ts

Do:

- Shower and use deodorant
- Brush your teeth and comb your hair
- Trim facial hair to a tidy appearance
- Make sure fingernails are clean and trim
- Keep jewelry and accessories to a
- Minimum (i.e. no more than 1 ring per hand, a watch, keep visible piercings conservative)
- Get a haircut!

Don't:

- Wear strong colognes
- Wear a hat
- Chew gum

A note on neckties:
Keep them conservative, avoid loud colors, patterns, or graphics. Learn to tie them. Especially a noticeable knot. Bow-ties are cool but only on those people who can pull them off. If you are going to wear one, wear a self tied instead of a clip on.

Pants

Keep pants simple

- Khakis, corduroy, or dress slacks (usually heavy silk, wool, or polyester) are appropriate.
- Tan, black, grey, or even dark blue are best.
- Avoid jeans (especially with holes), sweatpants, cargo pants, or skinny or baggy pants
- NO SHORTS!
- ALWAYS wear a belt.

Belts, Shoes and Socks

Shoes

- Business/professional shoes…not casual shoes (no sandals, sneakers, etc)
- Always polished and clean!
- Lace up or slip-on style are acceptable
- Colors
  - Black for black or navy suits
  - Brown for brown suits

Socks

- Socks should match your shoes or pants
- Should cover your calf

Belts

- Should match the color of your shoes
- Approximately one-inch wide
- No large buckles

THINGS TO KEEP IN MIND:

- Find out how your organization defines business casual
- One organization's business casual may be another's business professional
- Stick with classic, rather than trendy, clothes
- You should look appropriate for a chance meeting with a CEO, a supervisor, or an administrator
- You should not look like cocktail, party, or picnic attire
- Should be clean, well pressed, and not show wear
- Present yourself as a professional - research what is appropriate business attire in your field.
- Dress for the interview, not a party
- Don't distract the interviewer's attention; it should be on what you have to say, not your appearance
- Arrive early and check out your appearance
- A smile, a firm handshake, and a positive attitude make a good first impression

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We offer lifetime Career Assistance to ALL Oregon Tech Alumni!

Dressing for Success: What to Wear for Interviews and Job Fairs

Oregon TECH
Career Services
Empowering Student Success!

A Brochure for the Ladies Sponsored by Career Services

You get one chance to make a first impression.

What TO and NOT TO Wear for your interview or to a Job Fair.

Blouses/ Tops

Under a Suit Jacket:

- Tank-style tops in cotton, knit, or silk
- Tailored shirt
- Safest color: white

    It's conservative!

    Light or pale blue or light grey are also acceptable

Make sure your shirt is clean, wrinkle (or crease) free, and shows no sign of stains or odors.

Other colors and patterns can be acceptable as long as they are not loud, bright or obnoxious.

Suit Jackets should be plain without a lot of loud designs or accoutrements.

A Few Do's and Don'ts

Do:

- Shower and use deodorant
- Brush your teeth and hair
- Make sure fingernails are clean and trim to an appropriate length
- Keep jewelry and accessories to a
- Minimum (i.e. no more than 1 ring per hand, a watch, keep visible piercings conservative), keep neck jewelry conservative
- Get a haircut!

Don't:

- Wear strong perfumes
- Wear overly revealing clothing (i.e. low-cut tops, or high cut skirts)
- Chew gum
- Wear yoga pants or leggings-These ARE NOT pants

Suits

- Jacket with matching skirt or pants
- Skirts should be no shorter than top of knee
- Wool gabardine can be worn year round and is easy to care for
- Business dress with matching jacket is okay…no party, cocktail, or sun dresses
- Safe colors:

    Charcoal Grey

    Navy Blue

    Brown or Tan

Purses, Shoes and Stockings

Shoes

- Close-toed pumps with medium to low heel…no spikes
- Always polished
- Match your leather to your suit color
- Black for a black or charcoal gray suit
- Navy for a navy suit

Purse should match shoes

- Carry only one item (purse or briefcase) to the interview

Stockings

- Should be skin-toned
- Could be dark to match your suit
- Never white

Oregon TECH

Miscellaneous

Project Time Log

You will be required to provide a status report each week during your senior project. While you may exceed this, you are expected to work a minimum of 180 hours during your project. Over the course of three terms that will look as follows:

Weekly	6 hours
Each Term	60 hours
Project	180 Hours

This includes all meeting with your sponsors, instructor and faculty mentors as well as the time you need to conduct research, analysis and write your reports. You will be required to submit a weekly report of your hours throughout the project along with a brief overview of your project status and goals. This is not at all uncommon in the workplace to provide your supervisor with a status update with your hours. If you were a consultant, think of this as your billable hours!

* Rollover goals for next week to the items completed section for the next week.

Project Name: ______________________

PM : ______________________

Total Hours
0.5

Weekly Goal=6 hours
Term Goal=60 hours

Goals from Prior Week:

Task Name	Status	Comments	Risks?	Minutes/Hours
				0.50

Goals for Next Week:

Item Name	Status	Comments / Notes

MS Project

MS Project Management Software is a great tool for developing Gantt Charts and other project management tools. This section provides some notes and instructions for using the software. Please know that Gantt Charts can be developed with other programs or even using pencil and paper. PM software applications [Project Libre is a great example of a powerful option that is available online for free download] are quite handy. You can also use Excel to make a Gantt chart.

Below are some instructions from Professor Mike Peirce to help create Gannt Charts, network diagrams, etc.in MS Project.

1) Develop a list of Activities

2) Estimate the Durations for each activity (elapsed time)
   - e.g., duration will be 16 hours (elapsed time) to paint the entire house [but 48 hours total hours since I plan to use three painters]

3) Identify interdependencies of each task, i.e., IMMEDIATE predecessors

4) Create Table showing: Task, Duration, Dependencies (predecessors)

5) Open MS Project [or Project Libre, etc.] in Gantt view

6) **ONLY** input data using columns for Task, Duration and Predecessors
   (right click extra columns and 'hide')

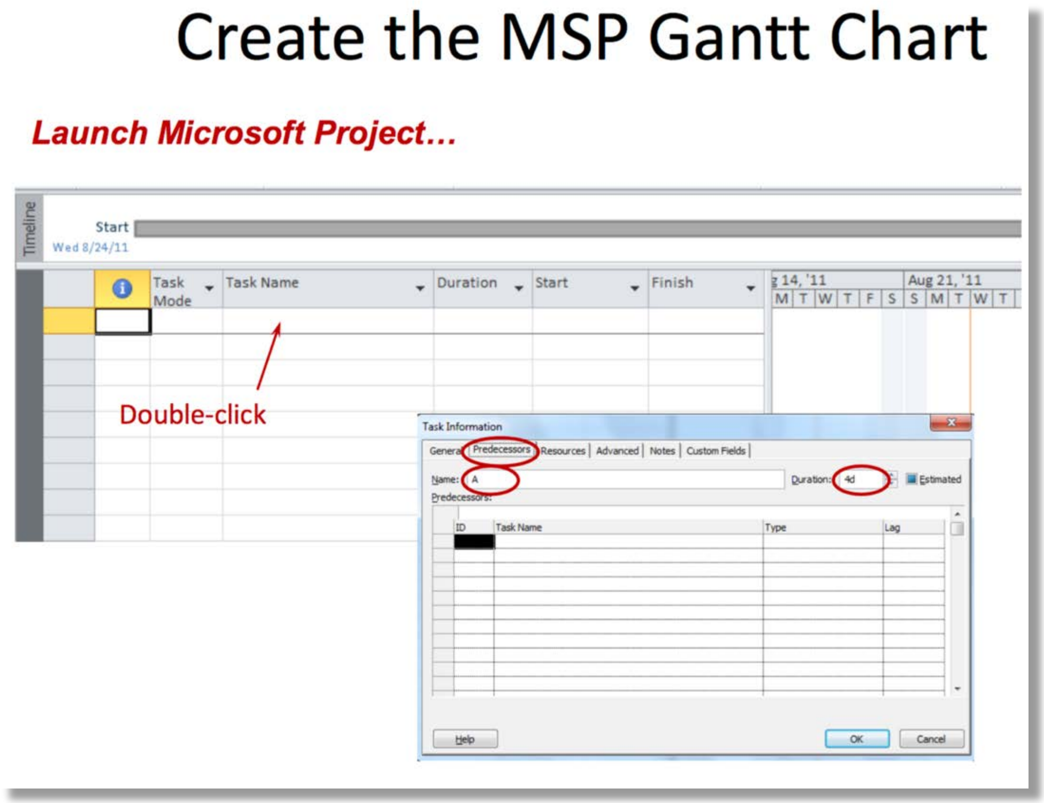
7) Input data for Task, Duration and Predecessors *** Remember SAVE as you work.

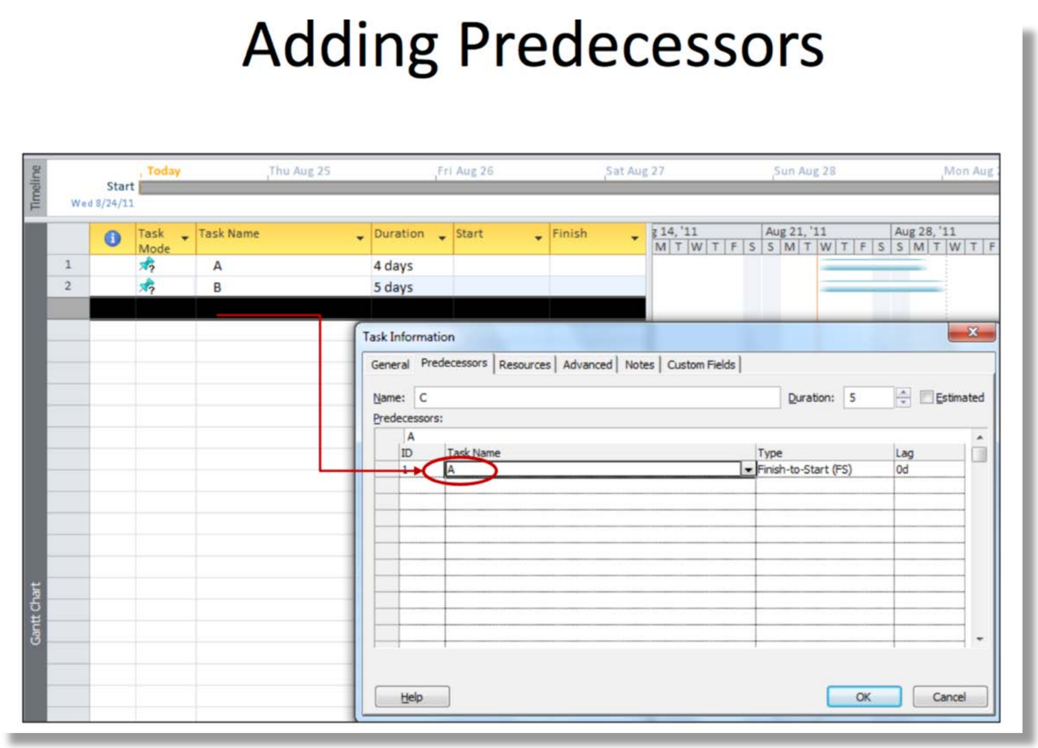
8) Change view to Network Diagram and see how it looks and
   - consider changes to dependencies if there are 'dangling' activities, e.g., no before or after activities for a particular task.
   - note 'critical path' with red lines

9) Switch view back to Gantt and revise, considering:
   - Gantt Chart should fit nicely on one page
   - change timescale (right click on timescale header), e.g., change from days to weeks, months, quarters, or whatever so it fills the page
   - Use the indent (or outdent) functions [generally toolbar buttons as left/right arrows] to show subtasks, e.g., indent level 2 work packages as subtasks for level 1 work packages
   - remember header information to make document stand-alone (like the WBS, the Gantt Chart displays a lot of information in brief format and as such is often separated from proposal and passed around for folks to look at)

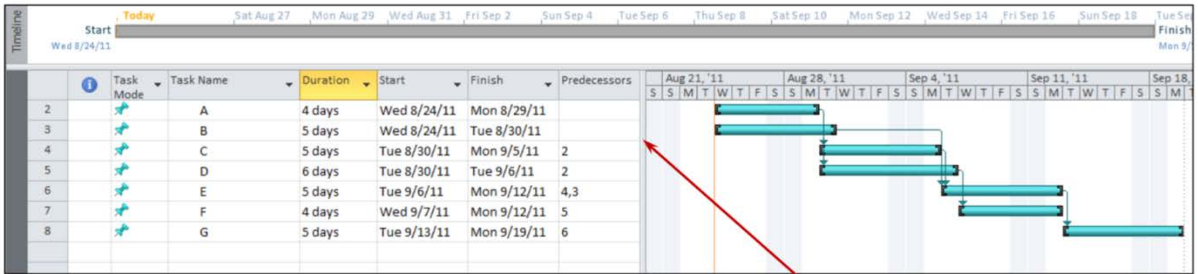
10) Note that relationships (predecessors) can also be created and modified in network diagram view by simply clicking and dragging lines from one activity to another

The following are screen shot illustrations provided by Professor Pat Schaeffer.



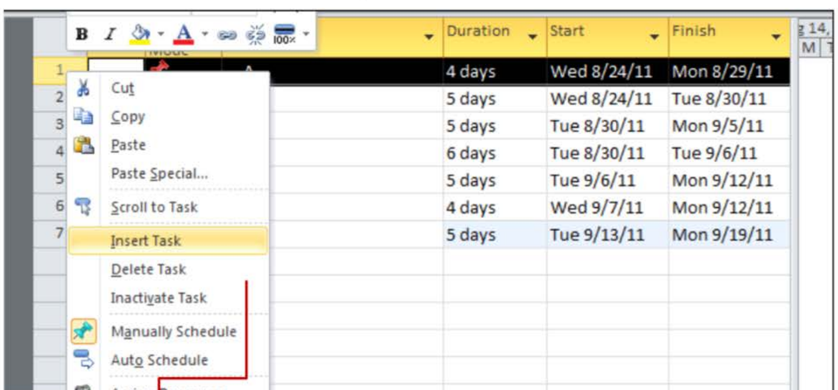


MSP Project Timeline & Gantt Chart



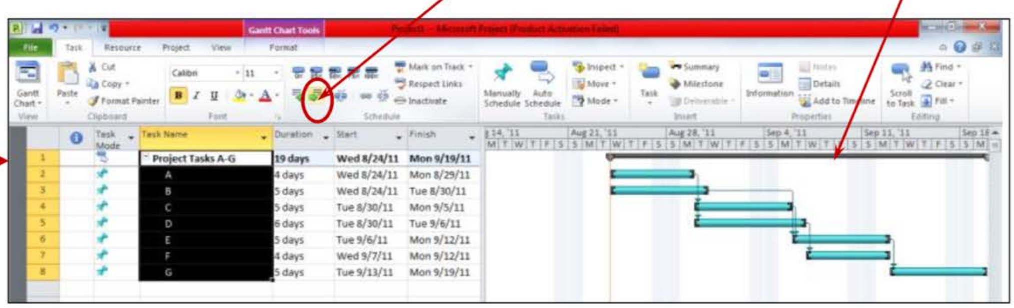
Note:
If you can't see the Predecessors, Click and Drag here…

Project Duration in MSP



Milestone Bar

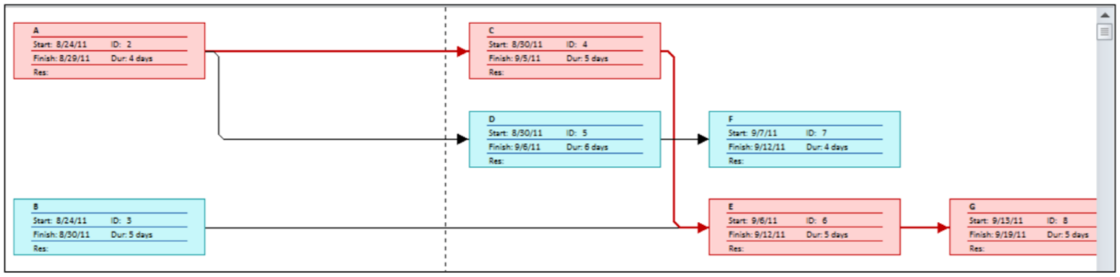
"Indent Task" button



MSP Project Network Diagram (Critical Path)

From the menu at the top of the MSP screen, Select…

View > Network Diagram > Network Diagram

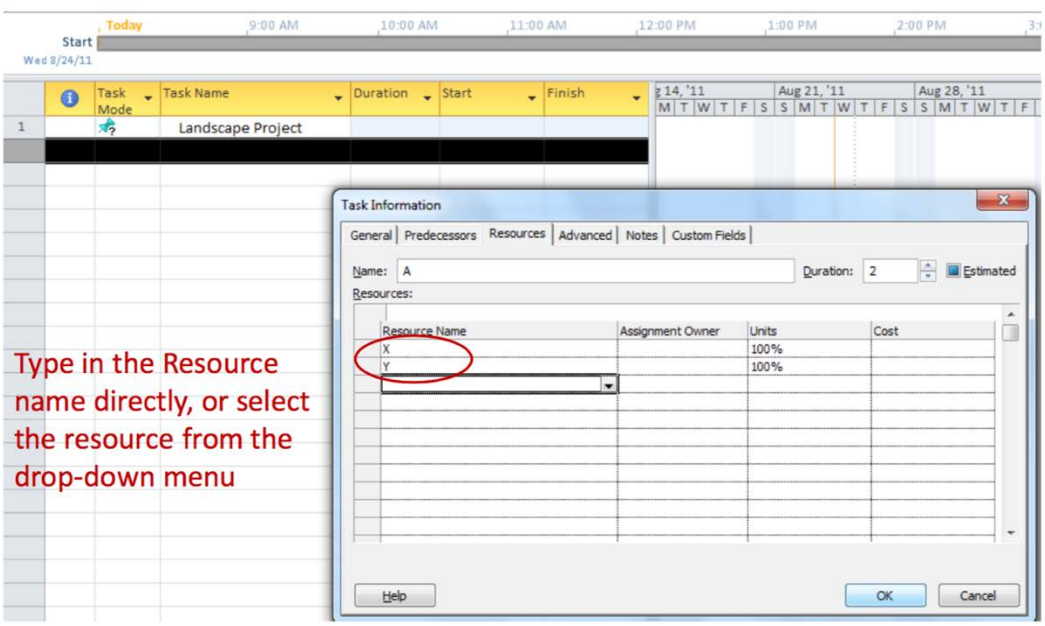


From the menu at the top of the MSP screen, Select also…

View > Network Diagram > More Views

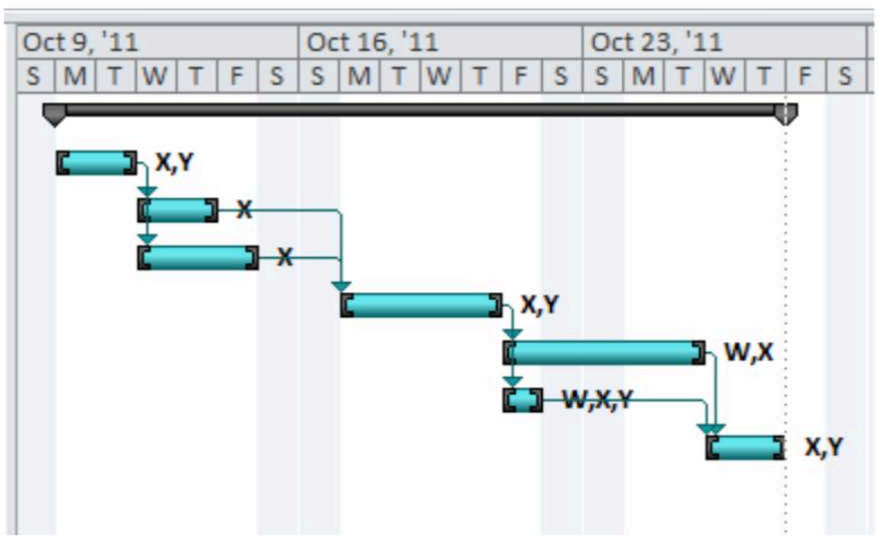
(At minimum, try "detail Gantt" & "tracking Gantt")

Adding Resource To A Task



MSP Gantt Chart with Resources

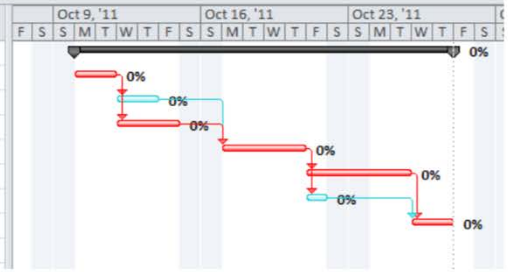
		Task Mode	Task Name	Duration	Predecessors	Resource Names
1			Landscape Project	**14 days**		
2			A	2 days		X,Y
3			B	2 days	2	X
4			C	3 days	2	X
5			D	4 days	3,4	X,Y
6			E	3 days	5	W,X
7			F	1 day	5	W,X,Y
8			G	2 days	6,7	X,Y



MSP Critical Path

View > Network Diagram > More Views > Tracking Gantt

	Task Name	Duration	Predecessors	Resource Names
1	**Landscape Project**	**14 days**		
2	A	2 days		X,Y
3	B	2 days	2	X
4	C	3 days	2	X
5	D	4 days	3,4	X,Y
6	E	3 days	5	W,X
7	F	1 day	5	W,X,Y
8	G	2 days	6,7	X,Y



✓ Critical Path: A – C – D – E – G (project completion in 14 days)

Resource Usage

View > Resource Usage > Resource Usage

Note: double-click here to change headers, size, etc.

	Resource Name	Work	Details		Oct 9, '11							Oct 16, '11							Oct 23, '11						
				Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	X	136 hrs	Work			8h	8h	16h	16h	8h			8h	8h	8h	8h	16h			8h	8h	8h	8h		
	A	16 hrs	Work			8h	8h																		
	B	16 hrs	Work					8h	8h																
	C	24 hrs	Work					8h	8h	8h															
	D	32 hrs	Work										8h	8h	8h	8h									
	E	24 hrs	Work														8h			8h	8h				
	F	8 hrs	Work														8h								
	G	16 hrs	Work																			8h	8h		
2	Y	72 hrs	Work			8h	8h						8h	8h	8h	8h	8h					8h	8h		
	A	16 hrs	Work			8h	8h																		
	D	32 hrs	Work										8h	8h	8h	8h									
	F	8 hrs	Work														8h								
	G	16 hrs	Work																			8h	8h		
3	W	32 hrs	Work														16h			8h	8h				
	E	24 hrs	Work														8h			8h	8h				
	F	8 hrs	Work														8h								
			Work																						

✓ Resource X is over utilized on Wednesday and Thursday of week 1, and Friday of week 2

✓ Resource W is over utilized on Friday of week 2

Oregon TECH

Appendix

Kingsley Outfitters: Market Entry

William Rutledge

Presented to the Management Department Faculty

of Oregon Institute of Technology

in Partial Fulfillment of the Requirements for the Degree

Bachelor of Science in Management

Table of Contents

Abstract

Kingsley Outfitters is an up-and-coming guide service serving Klamath Falls and the surrounding areas. The primary services that Kingsley Outfitters offers are guided hunts for squirrels and coyotes. The functions of the project include assisting the owner in start-up functions and in market entry including conducting a SWOT analysis, identifying target markets for the business and implementing print ads and social media marketing. The focus of the project is to leverage the market research, core competencies and the niche markets of Kingsley Outfitters in order to establish a sustainable competitive advantage in a way that differentiates them from the competitors in the area.

SWOT Analysis, Target Market, Core Competencies, Social Media, Competitive Advantage, Hunting

Kingsley Outfitters Introduction

Kingsley Outfitters is a locally owned and operated hunting and fishing guide service in the Klamath Basin in Southern Oregon. The owner, Zackery Cundiff, has previously owned Grim Reaper Tactical, a company that manufactured precision rifles geared towards hunting and target shooting. The owner decided to pivot the business model and rebrand, but the passion for hunting and the outdoors followed to what is now Kingsley Outfitters. The current primary focus of operations for Kingsley Outfitters is varmint hunting (i.e. coyotes and ground squirrels) which are abundant in the Klamath Basin. With no formal business education, and only the previous experience to lean on, Cundiff was open to allowing this project to be conducted. The classic small-business scenario lent itself well to the area of study for the Project Manager.

Project Overview

The primary objective of this project was to facilitate the necessary processes for starting a new business model and solidify and define the core competencies of the business. In addition, this project developed an identity for the business including a logo and created a local and an online presence through the form social media and a website, which in turn differentiates the organization. A n in-depth market analysis was also conducted which illustrate the primary differences and strength of this business. The core competencies outline the activities that the business does better than any of its competitors. The differentiation strategy defines what the business does differently than any of its competitors. These pieces of information were used to create a sustainable competitive advantage for this new hunting guide service starting up in the Klamath Basin.

Assumptions

That there is a market for a hunting guide service in Klamath Falls.

- There are already competing guide services well-established in the Klamath Basin and surrounding areas. In order to for a start-up to remain sustainable, there must be a large enough market or a competitive enough business model to capture market share.

The client/sponsor of the project will share business details that create a competitive advantage.

- A business starting up among established competitors must have skills, services, or knowledge that makes that business superior in some aspect to its competitors. Additionally, a start-up business needs to differentiate itself amongst competitors.

Scope

The scope of this project includes a market analysis for Kingsley Outfitters and of its competitors. Also within the scope are the social media accounts of the business and the related start-up functions for marketing. Such as: developing a logo, creating some physical media to distribute around the area, establishing a website and reservation planning system.

Due to time constraints, the areas that fall outside of the scope of this project were the strategic partnerships at Kingsley Outfitters, the acquisition of hunting permission on private properties, all insurance and liability functions and corporate structure of the organization

Impact

The primary functions of this project impacted the marketing systems of the organization the most. Developing a logo and opening social media accounts gave the company an identity and allows customers to share and interact with the business. Building a reservation system created a more efficient organization and enhanced the customer service experience. The market analysis further defined the identity of the organization and assisted in determining the pricing structure and the ways for Kingsley Outfitters to be a competitive outfitter.

Project Method

The primary research for this project included defining a market for the organization and analyzing what other guide services did and did not do well in Klamath Falls and surrounding areas. Additionally, informational interviews were conducted with local ranchers, farmers, and land owners in the Klamath Basin, to determine the effects of coyotes and common ground squirrels and the damages that they produce.

The secondary research for this project included the spending habits of hunters and what proportions were allocated to guide services. On a broad scale, guide services from the entire state were analyzed, to deduce which aspects made an outfitter successful and which activities seemed the most lucrative. This data helped determine the best course of action for Kingsley Outfitters in the near and distant future.

Timeline and Milestones

Table 1.

A list of milestones for the project and their respective deadlines.

Milestone	Deliverable	Date
Name Registered	State Registration	11/30/15
Logo Drafts Created	Files Distributed	11/15/15
Social Media Accounts	Pages Published	01/01/16
Logo Finalized	File Distributed and Uploaded	12/01/15
Website	Website Published	01/01/16
Market Analysis	Report Completed	11/20/15
Marketing Materials	Circulated in Klamath Falls	02/15/16
Scheduling System	In Place with Customers Scheduled	03/01/16

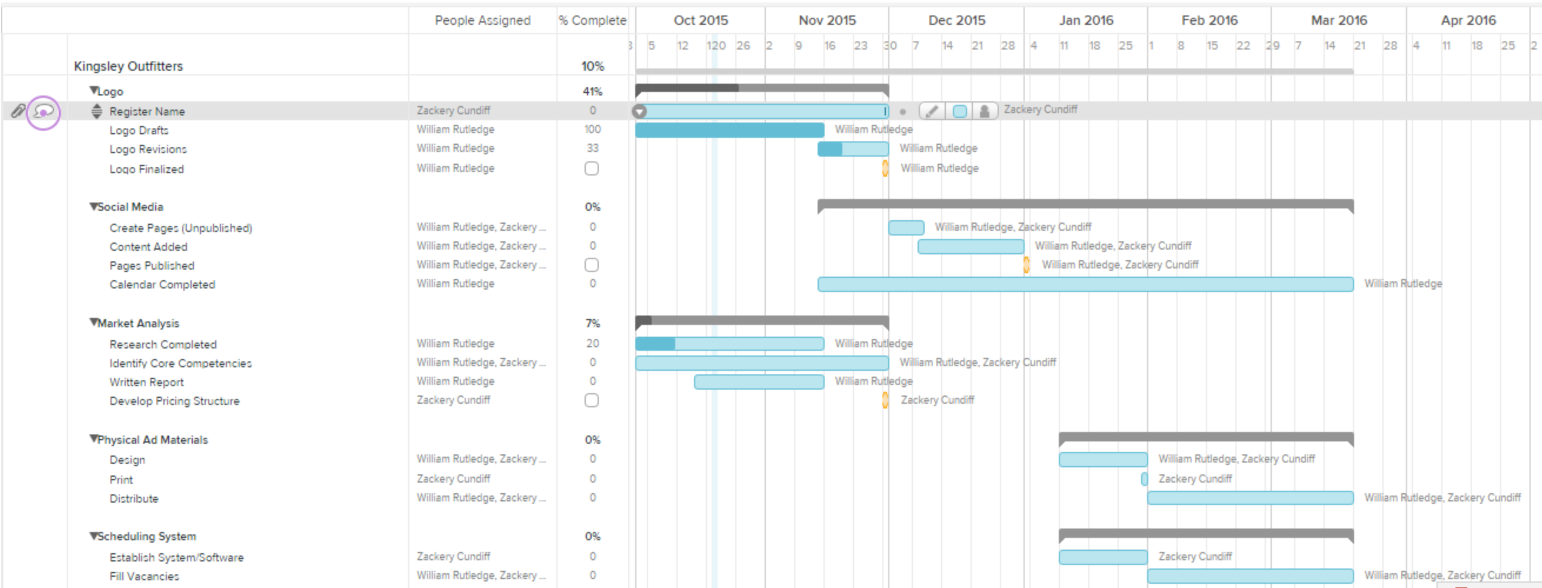


Figure 1. A Gantt Chart detailing the components of the project.

Project Success Metrics

One deliverable of the project was the market analysis which was intended to clearly define the core competencies and the differentiation strategy of the business. This report also included an S.W.O.T. analysis. The information in that report was used to develop a marketing strategy in addition to ways that the organization can gain a sustainable competitive advantage. The measureable results from this report therefore, are clear definitions of core competencies and a tangible marketing strategy including social media and physical advertising materials (which were distributed as part of the project).

Another deliverable of the project was designing and implementing a logo for Kingsley Outfitters. This logo is used to identify the organization. Other measures included creating social media accounts, namely Instagram and Facebook, and establishing a website for Kingsley Outfitters. These objectives were deliverables in themselves, however, each platform needed the logo uploaded and needed quality content posted. Social media accounts were also monitored for customer feedback and interaction and the goal set for the Facebook page was fifty likes by the time the project closed in March.

Furthermore, another measureable factor of success for the project was having a scheduling system in place and filling vacancies with reservations for the 2016 hunting (which began at the relative end of this project).

Organizational Background

Kingsley Outfitters came from the ashes of several other businesses. The mission at its heart is to share the joy and the tradition of the sportsman lifestyle. The core values of the business are integrity and ethics; which resonate strongly with outdoorsmen of all disciplines. The history is somewhat convoluted, as the primary owner has a primary profession outside of Kingsley Outfitters and has previously owned a business that built custom rifles and rifle components.

After much deliberation and due to some unfortunate circumstances, that owner chose to pivot the business model instead to hunting and fishing guide services. The unique skills acquired in previous business ventures do however lend some advantages to this business model. Customers booking hunting trips will additionally have the opportunity to use rifles constructed by the owner. There will also be ammo available. The rifles will be of custom quality and will be fitted with suppressors, which are legal to own and use in Oregon. This offers a hunt that is much more of an experience rather than only a service offered. In addition, the nature of his previous businesses and personal interests has allowed the owner of Kingsley Outfitters to secure hunting rights on various private properties in and around the Klamath Basin. (Cundiff, Zackery. Personal communication. October 18, 2015).

From a marketing standpoint, Grim Reaper Tactical utilized a Facebook page and attended gun shows at the Klamath County Fairgrounds. Outside of that, very little attention was given to marketing. That is something that will be drastically different in this business venture. At the time this project began Kingsley Outfitters had no marketing efforts in place (Cundiff, Zackery. Personal communication. October 18, 2015).

Stewards of the Land: Corporate Social Responsibility

The staff and supporters of Kingsley Outfitters is comprised of respectful sportsman who believe in the traditional values of game and varmint management. Hunters as a breed are caretakers of the land and animals as much as farmers. As such, there is a responsibility to show the utmost respect for the land and the quarry.

In an informational interview Shelley and Steve Wirth, local ranchers, shared some insights about coyotes and ground squirrels, which are the primary focus of hunting for Kingsley Outfitters. The Wirth's cite squirrels for lost production in alfalfa crops as the rodents consume young plants and seeds. Additionally, the dirt mounds produced by squirrels greatly increase the wear and tear on harvest equipment, which is costly. This local family has lost entire crops to the adverse effects of squirrels. The most effective (most humane) poison to control the population was banned some years ago (Wirth, Shelley and Steve. Personal communication. November 2015). With few other options, shooting squirrels is a feasible and relatively humane management strategy.

As for coyotes, the Wirth's observed that the greatest threat is predation on weak or premature cattle. The beginning and end of each calving season are the most high-risk times for the herds. In addition to livestock, the Wirth's also noted that coyotes have a large negative impact on the populations of game animals in the area including deer and antelope. By calving later in the year, it is possible to mitigate the effects of coyote predation and coyotes will feed on game animals and rodents and varmints instead (Wirth, Shelley and Steve. Personal Communication. November 2015). It is worth noting that coyotes play a vital role in an ecosystem. But where populations thrive in excess and affect the livelihood of people, the populations must be managed in the same way that coyotes manage the population of other animals.

Kingsley Outfitters utilizes relationships with local landowners to gain access for prime hunting spots. Land owners benefit by being rid of these animals. Kingsley Outfitters is committed to being good stewards of the land and maintaining these relationships and therefore polices brass very carefully. A single hunter shooting ground squirrels for a day can expand several hundred rounds of ammunition, and a specially designed trailer contains the spent shell casings to be recycled. This also keeps the properties from being littered with brass.

Stakeholders

The Sponsor/Client

- This was the primary beneficiary of the project as the project theoretically contributes to the success of the business by forming an identity for the business and marketing the business.

The Project Manager

- The project manager benefitted from the process and experience of the project and gains and important addition to the professional portfolio. In addition, the Project Manager and Client have worked together previously and there is intrinsic value in seeing the ongoing success of the business.

The Land Owners

- The quarry that Kingsley Outfitters primarily focuses on are coyotes and common Grounds Squirrels, both of which cause damage to property, crops, and livestock. The land owners directly benefit from Kingsley Outfitters when these varmints are removed on the hunts.

Local Customers

- Local customers who do not have the knowledge or land rights to hunt on their own benefit from an affordable option. In addition, the staff at Kingsley Outfitters has a large amount of knowledge and experience to impart. Kingsley Outfitters plans to offer big game services in the future which with further benefit local customers with time or knowledge constraints.

Visiting Customers

- Visiting customers benefit from Kingsley Outfitters by having another option available when booking a hunt in the Klamath Basin. The penetration pricing and the alternative experience offered through Kingsley Outfitters offers additional advantages.

Literature Review

In any thriving, competitive market, individual businesses will always grapple with strategies to differentiate themselves. One primary way to implement a differentiation strategy is to aggressively market businesses' core competencies. The core competencies of a business are the specific proficiencies an individual business possesses that separate the organization from competitors in the field. These proficiencies can be in the processes of the business or in the products or even the technical knowledge or capabilities of the business. Because these proficiencies are the defining features between businesses, they are the ideal focal points for the marketing efforts of the business. Additionally, the core competencies are the primary provider of value to the customer and due to this it is vital to convey these differences to customers in order to remain competitive. Additionally, Prahalad asserts in the article “The role of core competencies in the corporation”, that by creating a strategic intent for a business these aspirations will continually push the boundaries of what the business is capable of and by doing so, will inspire innovation within the organization (1993). By having a conceptual grasp of the fundamental strategic intent of the organization, a company promotes a competitive advantage.

Hunting guide services in Oregon are numerous to say the least. At an extremely conservative estimate, there are at least 20 guide services specifically for hunting in Oregon according to the Oregon Guide and Packers Association. Many of these outfitters rely on the varied locations in the state to differentiate the organization. The knowledge of the diverse terrain in the state, from the high desert and coastal regions to the flat landscapes of eastern Oregon, offer a distinct advantage to local outfitters hunting familiar terrain. Another variance between outfitters is the type of quarry that they pursue. A large number of these outfitters hunt squirrels all the way up to elk, some of the largest game in North America. Nearly all the 20 aforementioned guide services offer varmint hunting alongside big game hunting services. Additionally, many of these companies also offer fishing guide services which create unfocused operations while being very versatile from a market standpoint. However, the numbers of organizations dwindle to five or less when analyzing companies that offer solely varmint or predator hunting (Oregon Guide and Packers Association). This could be interpreted two ways; either predator and/or varmint hunting are very specialized and few companies choose to offer these specialized services to the extent that these five do. Or conversely, these sports alone are not in demand enough to solely sustain a business and for that business to remain viable and competitive in a saturated market.

According to the report, *The Oregon big game resource: An economic evaluation* the average percentage of total hunting expenditures in Oregon that were allocated to hunting guide fees was .4 percent (Brown, Nawas, and Stevens, 1973). A 2011 census of hunters and fisherman in the United States confirms those finding and adds that guide expenditures across all hunting sports is about $500,000,000 annually (U.S. Fish & Wildlife Service. 2012). Based on a 2012 report from the National Shooting Sports (which is based on the 2011 census) that amounts to roughly a 3.5-million-dollar industry in Oregon alone. And while no specific figures are included for varmint or predator hunting, numbers of hunters for all types of hunting in Oregon in 2011 totaled 196,389 and of those total hunters 173,794 hunted big game while the numbers for upland and waterfowl game were so small they were deemed negligible and they were not included in the report (Hunting in America: An Economic Force for Conservation. 2013). By far, big game such as deer, elk, antelope and bear commonly found in Oregon make up the majority of total expenditures for hunting in the state.

Based on these findings, a hunting guide service in rural southern Oregon would be wise to expand operations to include big game hunting services in addition to varmint and predator hunting, if not even to upland, waterfowl and fishing. The core competencies in this case would fall outside the area of specific operations and services offered and fall more into the realm of the specific experience offered by the company. The next step would be identifying what the business does that no competitors do, or what the business can do better than competitors.

Discussion of Research

Informational interviews were conducted with the owner of Kingsley Outfitter as well as local farmers and ranchers. The theme was easy to deduce. The business needed a source of quarry (coyotes and ground squirrels) and the ranchers were happy to be rid of them. This symbiotic relationship is the lifeblood of Kingsley Outfitters.

The varmints are responsible for vast amounts of damage to crops, equipment and livestock (Wirth. Personal Communication. 2015). Kingsley Outfitters thrives on the ability to access major hunting grounds and the vast majority of that land in the Klamath Basin is private property. By leveraging that information the arrangements are beneficial to both parties. Land owners additionally benefit financially from a "trespassing fee" for allowing the company access to the land.

This primary research also led to an unexpected discovery of an unfilled niche in Klamath Falls and the surrounding areas. The market of hunters in Southern Oregon is comprised of hard-working folks, blue-collar and white-collar alike, and a large portion of them do not have the time to do the scouting (gathering information about the habits and hotspots of animals) necessary for a successful big game hunt. This leaves the possibility for Kingsley Outfitters to potentially expand operations to fill that void.

As previously stated, the market for Kingsley Outfitters is specifically in Klamath Falls, OR and outlying areas. For that reason, the target market are the people in or near the area who either already varmint hunt, or those who hunt but haven't tried predator hunting yet.

The median household income in Klamath County hovers just under $40,000 (Klamath County QuickFacts, US Census Bureau). This means that there is not a lot of discretionary income. That is not to say that there isn't money being spent on this industry, however. According to The

Lifestyle Market Analyst for 2007, hunting and shooting are ranked number four in the top ten lifestyles for Klamath Falls and Medford. Just ahead of it are camping, hiking and recreational vehicles (*The Lifestyle Market Analyst*, 2007).

The Klamath Basin is rich with outdoor enthusiasts and hunters and shooters make up a great deal of that populous. There are also plenty of affluent citizens in Klamath Falls who will spend a lot of money on high quality gear and services, especially when the have little time to spend. Ranchers and Farmers in outlying areas will also spend money on pest control solutions and the community is very serious about hunting and even those with little spend will often choose to spend it on the sport they are passionate.

The challenge however, is putting this information into action. The primary function is to offer services that take advantage of the willingness to spend money in the industry as well as fulfill the other needs of the market. For instance, for professionals who have a moderate expendable income to spend on hunting there is an opportunity for Kingsley Outfitters to offer a service to that niche. This market segment however, while has a budget available, tends to be limited in terms of time. These professionals could take advantage of a company that offers scouting services for big game hunts. They are willing to go hunting but may not have the necessary time to scout the area for their quarry.

Analysis of Data

Designing a Logo

Few things can measure the brand-awareness of a company quite the way a logo can. The prime example of that concept is Nike, with their signature swoosh. The symbol itself is enough for consumers not only to identify the name of the company, but to invoke the identity of the company and all they stand for (Campbell. 2015. A VISUAL purpose. Entrepreneur, 50-54.).

An initial interview with the owner of Kingsley revealed the desire for that very concept; a symbol that inspires a brand, not just a name. Initial designs centered round imagery that goes hand-in-hand with hunting. Such as, crosshairs, animal silhouettes and rugged, edgy text. The first set of logos reflected that styling (these initial versions can be viewed in the appendix of this report). After reviewing the concepts, the owners decided that the imagery limited the perceptions of the business for potential customers. The logos suggested that all the company does is hunt coyotes and squirrels (Cundiff, Zackery. Personal communication. October 18, 2015). The final results (which can be viewed in the Results section of this report) leaves room for the company to expand.

Industry

According to Farnham and Jacob, “Of the more than $10 billion spent by hunters, most (49%) goes for guns, ammunition, camping gear, vehicles, and other equipment. The rest goes for food and lodging, 19%; transportation, 16%; buying and leasing land, 9%; permits, licenses, and other government fees, 4%. That 4% ($435 million) foots nearly the entire bill for state wildlife restoration programs” (1992. A Bang That’s Worth Ten Billion Bucks). While those numbers are from a dated report, the industry of hunting is alive and well, and very much so in rural Southern Oregon.

Summary & Conclusions

I. Business Review

Kingsley Outfitters is a brand new hunting and fishing guide service based in Klamath Falls, Oregon and serving Klamath Basin and surrounding areas in southern Oregon. The staff is small, and Kingsley Outfitters is not yet a day job for the Owner and Founder, Zackery Cundiff. Cundiff brings to the business his enjoyment for the outdoor lifestyle and extensive experience and expertise as a hunter. While there are several guide services in the Klamath Basin, most offer a wide range of services which stretch resources thin. Kingsley Outfitters, in contrast offers a very few select services for the time being. This keeps the operation focused and efficient which is critical in the developing stages.

The primary focus of Kingsley Outfitters services for the time being are hunting for coyotes and shooting squirrels. Both types of quarry can be found in abundance in the Klamath Basin and neither have season restrictions or bag limits which render them an excellent selection for the primary focus. Additionally, both animals cause damage to livestock and crops which are vital to an agricultural community like Klamath Falls. With exclusive land rights Kingsley Outfitters has a plethora of opportunity to supply hunts to customers in addition to helping out local families and ranchers.

Currently, the business has little money to allocate towards marketing efforts. Facebook and other social media are the only mediums of advertising the company is currently involved in. However, physical forms of advertising are in progress. There is tremendous value in the social media medium because it is measurable and it is free. Also traditional mediums do not offer the level of instant feedback and customer interaction the way that social media platforms do. Looking forward, this business model would condone the use of more unconventional forms of marketing.

Product Life Cycle

Kingsley Outfitters in the Introduction Stage of the Product life style. The features of this stage that are indicative of this stage are:

- The business is seeking to build awareness.
- Branding is being established.
- Licensing, logos, registration all occurring.
- Low, Penetration Pricing Model to build market share.
- Educating Potential Customers.

- Distributing to underutilized markets.

Marketing Mix

Product (Service)

The products that Kingsley Outfitters offers are the services for coyote hunting and for varmint hunting. Neither of these services is unique among outfitters in the Klamath Basin but neither of them is a primary offering from any other outfitter either. In addition, varmint hunting will take place from a specially constructed trailer will offer customers an unrivaled experience. There will also be the opportunity to use custom-built firearms constructed by the owner, all of which are of exceedingly high quality and are all noise-suppressed which is legal in Oregon. This offering means that customers in Klamath Falls do not have to have their own equipment with them to book a hunt with Kingsley Outfitters.

Price

After carefully considering the prices of competitors in the area of operation, Kingsley Outfitters has developed a low-penetration pricing strategy. While there is a substantial gap in pricing that would allow Kingsley Outfitters to increase prices with more brand recognition, the current pricing is sustainable without being detrimental. The graph below compares Kingsley Outfitters to ROE Outfitters (the main competitor in the market) for identical services.

Figure 2. Price Comparison: ROE Outfitters vs. Kingsley Outfitters.

Promotion

Promotions for Kingsley Outfitters are limited at best. Social Media is the main medium used for advertisement. This business model lends itself to platforms like Facebook and Instagram for a number of reasons. First and foremost, they are free. In addition, they offer the advantage of being measurable and offering a great amount instant customer feedback and interaction. A post on Facebook has a tangible response and can be monitored by the administrator. In contrast, radio advertisement for example is ambiguous and there is not a measurable direct response that can be seen from it.

Kingsley Outfitters will also have a presence at local events such as gun shows, job fairs, and any additional venues where the target market can be reached. These mediums will be combined with printed advertising that will be distributed to hotspots for local tourism as well as outlets for students in Klamath County, which are a secondary (and untapped) market in the area.

For the time being, Kingsley Outfitters will continue to utilize social media, and proceed with a minimal advertising budget. In the future however, with more financial flexibility, advertising efforts may expand.

Place

The physical address for Kingsley Outfitters is 1200 Adams St. Klamath Falls, Oregon 97603. However, the services offered by the business can be found all over the Klamath basin and surrounding areas. Marketing efforts can be found on campuses, in hotels and resorts in Klamath as well as online.

Core Competencies

Jim Collins introduces the Hedgehog concept in his book *Good to Great: Why Some Companies Make the Leap…and Others Don't*. The parable goes that the fox know many things while the hedgehog knows one big thing. The analogy in terms of business goes that foxes are diverse, spread thin, and inconsistent. In contrast, hedgehogs are very consistent and experts at one thing. The Hedgehog concept is about a business understanding the overlap in the three circles as Collins refers to them. These are: what they are deeply passionate about, what can they be best at in the world and what drives their economic engine (what they can make money doing) (96).

The uniqueness of this business lies in its ability to provide customers with the necessary equipment for the hunting excursions offered. These are not simply basic, sufficient equipment, but rather high-quality, custom firearms that are suppressed. This is an experience that many hunters, native to Oregon or not, have likely not experienced.

Additionally, as stated before, the offerings of coyote and varmint hunts are not unique among guide services in the area. However, for the time being Kingsley Outfitters focuses on these two types of quarry. This maintains the efficiency and the streamlined model of this up-an-coming business. These animals also cost local farmers and ranchers a lot of money due to the damage they cause to livestock and crops. These local folks will benefit from the service of the business because customers of Kingsley Outfitters will lessen the populations of these varmints. They will additionally benefit financially from a 'trespassers fee' collected from each hunt that takes place on their personal properties.

Zackery Cundiff and his staff are extremely experienced and skilled. Which add credibility to the entire experience of booking a hunt with Kingsley Outfitters. Beyond that, they are safe, ethical and easy-going guys who want nothing more than to go out and have some fun and share the sport they have such a passion for.

II. Competitive Review

The main threat that Kingsley Outfitters faces is capturing market in an activity that local citizens can do in their own back yard. Many potential customers in the Klamath basin would rather hunt on their own or know someone who can take them or let them hunt on their property. The alternative of booking a hunt through a guide service, especially for a less regulated quarry could be considered expensive or unnecessary. The critical points to sell on then, are 1) the expertise that you get with a guide that is very experienced and can get you close to animals, 2) the access to private properties that are available only through Kingsley Outfitters and, 3) the *experience* that is offered through hunting with Kingsley Outfitters.

Companies like ROE Outfitters pose the greatest threat to Kingsley Outfitters. They are by far, the most established and well-known guide service in the Klamath Basin. The main difference however is the ROE Outfitters offers fly fishing, waterfowl hunting, river fishing, rafting, coyote hunting, kayaking, birdwatching, quail hunting, cabin rentals, and the list goes on. However, waterfowl hunting and all-types of fishing are the primary services that people associate with this company.

Competitive Advantage

Kingsley Outfitters does have some distinct competitive advantages over ROE Outfitters. First and foremost are the prices that Kingsley Outfitters will be able to offer versus Roe Outfitters and other competitors. Having a very narrow scope of operations comes with the advantage of less overhead. Additionally, Kingsley Outfitters should hypothetically offer a higher quality experience in the areas of coyote hunting and squirrel shooting because it is the main focus of the business, all while offering it cheaper.

The additional advantages have been previously discussed, such as high quality firearms that will be available to use through Kingsley Outfitters and a specially constructed trailer specifically built for varmint hunting in mind.

III. Current Market Situation

The current situation of the business is in a transitional stage of maturity. While the business is becoming established and branded in Klamath Falls, Zackery Cundiff hopes to get the name of Kingsley Outfitters further into the Klamath Basin and outside the area and outside the state. The nature of the business lends itself to being marketable to tourists and sportsmen travelling through or to Klamath Falls as a hunting destination. Reaching more potential outdoor enthusiasts brings them to Klamath Falls to stimulate the local economy. And expand the potential market of geographically fixed business.

In addition, Kingsley Outfitters hopes to narrow down the target markets even further and better comprehend the primary channels to use the available means of promotion to reach that market. By targeting a narrow market segment and advertising specifically, the business could potentially see a huge growth and be in a position to manage that growth.

S.W.O.T. Analysis

Kingsley Outfitters is in a growing state, but there are some market and service development opportunities. While on a very limited budget, Cundiff has had some early success this year and establishing social media accounts and distributing marketing material will only help increase the customer base. Cundiff wants to identify the most effective way to reach his defined target market. And by doing so, increase the number of hunts book for the 2016 season. Opportunities and target market rely heavily on rural community residents from Merill, Malin, Bonanza, Chiloquin and Midland etc. in addition to people from outside the state or the southern parts of Oregon.

Table 2
SWOT Analysis for Kingsley Outfitters

Internal Strengths:	Internal Weaknesses:
• Experience and Expertise • Penetration Pricing • Focused Variety of Services • Equipment Available • Small Business	• Minimal Advertising • Limited Advertising Budget • Limited Services • Small Business • Time Commitments • Unestablished
External Opportunities:	**External Threats:**
• Outdoor Program at Oregon Tech • Student (and other untapped markets) • Higher Employee Base (more capacity) • New and Younger Generation • Widening Services Offered	• Local businesses such as ROE Outfitters • Failing to Grow/Adapt • Penetration Pricing (Perception)

Internal Strengths

- **Experience and Expertise** are highly valuable for a service that is dependent on the guide's ability to get close to game, even though there are external variables.
- **Penetration Pricing** is incredibly useful because, just as the name suggests it is a low price strategy that allows a business to penetrate a market until it become more established in brand and operations.
- **Focused Variety of Services** means that there is a lot of attention going into a much smaller offering of services. This yields a better quality, more refined finished product.
- **Equipment Available** because of previous business knowledge offers a new level of *experiences* to the services offered by Kingsley Outfitters and helps hunts by Kingsley Outfitters stand out from hunts by other competitors.

- **Small Business** allows a huge amount of control and personability in each area and each day of operations.

Internal Weaknesses

- **Minimal Advertising** is temporary because only social media is currently available. However, this is how customers find out about the business.
- **Limited Advertising Budget** as previously stated is a weakness because besides word-of-mouth, this is how potential customers become actual customers.
- **Limited Services** offered by Kingsley Outfitters puts the business at a disadvantage for customers who may have previously used another company for one sport, and will continue to go back to that company because there are no other options.
- **Small Businesses** are two-edged swords. To remain sustainable a small business will need to act on feedback and trends and stay very flexible to customer needs and wants. Also, small businesses need to be willing and able to expand capacity when/if demand allows.
- **Time Commitments** will be critical because this is not the primary profession for the Owner of the business. However, this is the case for a large portion of small business owners.
- **Unestablished** businesses must work doubly hard to gain market share in an environment that belongs to a handful of already established companies.

External Opportunities

- **Outdoor Program at Oregon Tech** has already expressed interest in booking a group event for the early 2016 season.
- **Student (and other untapped markets)** are available and are largely unmarketed-to for this industry. They could potentially be a suitable secondary market, particularly to the most cost-effective competitor in the area.
- **Higher Employee Base (more capacity)** will be required to increase the output of the business. Particularly if the customer base grows quickly or if the services offered expand.
- **New and Younger Generations** are waiting to be pulled into to the lifestyle of sportsmen. An affordable guide service is an excellent way to learn and experience a new world first-hand.
- **Widening Services Offered** will be an important component to maintain a competitive advantage. There aren't any companies in the Klamath Basin offering big game services and this is a proportionally large market (as indicated in the literature review associated with this project).

External Threats

- **Local businesses such as ROE Outfitters** are already established, have an excellent reputation and offer a wide variety of services. This will be a formidable obstacle for Kingsley Outfitters to overcome.
- **Failing to Grow/Adapt** to a changing market, or a growing consumer base can be a disaster for a small business. It is vital to have a strategy to manage the growth of the market and of the business.
- **Penetration Pricing (Perceptions)** can affect the way a customer sees a particular business or service. Why is *this* so much cheaper than *that?* It is vital to combat these perceptions by providing value to the customer and portraying the services and experience offered.

Market Description

The first segments represented in this report are middle aged consumers with a moderate disposable income looking for quality outfitters who offer a service for a very competitive price. This segment is comprised of professionals and blue collar-workers who have extensive time commitments that restrict them from scouting or gaining permission to hunting properties. Their time on the weekends or vacation is precious and they aim to make the most out each hunt. This means trusting guide to get them close to animals when it counts. They seek an active, healthy life full of adventure and they will spend money on an excellent experience.

The next segment represents a younger crowd with similar tastes but less monetary resources. Kingsley Outfitters can target this segment on the local and surrounding college campuses and even to high school students and young adults in the area. With the lack of entertainment industry geared towards this age group in the Klamath Basin, they are always looking for something new to do. They are attracted to social events and can be easily sold on a healthy, relatively affordable means of entertainment. Booking hunting trips with friends through the outdoor club or with a discounted or student rate fits the bill.

Table 3

Ideal Customer Examples

Target Market (Combination of variables/bases)	**Target Market Need or Want**	**Benefits Sought**
Segment 1—Example: "Frank the Hunter"—Male/Female, Gen Xer, professional, married with modest/moderate disposable income. Cares adventure and thrill seeking. Innovators or early majority. Does not have the time to scout or obtain land permission.	This segment cares for quality services but needs advice and instruction. They need the proper equipment to outfit themselves for their next adventures. They are avid outdoorsmen, they are the weekend warriors with serious professional commitments that limit their time.	They seek the benefits of a healthy active lifestyle. The equipment and gear they used help experience life to the fullest by preparing them for each adventure. The time saved in scouting efforts and securing access to land in huge bonus.
Segment 2—Example: "Tommy the Potential Hunter"—Male/Female, young Gen-Yer, college student, active, works part-time and is on a budget but willing to spend disposable income on having fun, especially with friends. Members of Oregon Tech Outdoor Club or KCC, etc.	This segment needs an available service that helps them experience the outdoors on weekends that won't break the bank. They want to be able to do an activity that is healthy and fun, that can also be a social event.	They seek the benefit of health and wellness and having fun with minimal cost. They are inexperienced in the sport and have little to know knowledge or equipment required.

Positioning

The positioning for Kingsley Outfitters in the Klamath basin has yet to be truly established. However, by focusing on low-cost strategy with a very focused offering in the market, it is reasonable to assume this business will work its way into the market. The challenges will be maintaining the low-costs while expanding the business and its services. In addition, once established, Kingsley Outfitters will need to define its value proposition to market the services as *higher value,* rather than underselling itself as a cheaper alternative to higher quality options in the market.

Results

Social Media

A core component of this project included producing a Facebook and an Instagram account as a primary marketing tool. Below are screen shots of the respective social media platforms. The accounts can be viewed currently online at https://www.facebook.com/Kingsley-Outfitters-848699605228902/ for the Kingsley Outfitters Facebook account and https://www.instagram.com/kingsleyoutfitters/ for the Kingsley Outfitters Instagram account.

Figure 3. A screen capture from Kingsley Outfitters Facebook account.

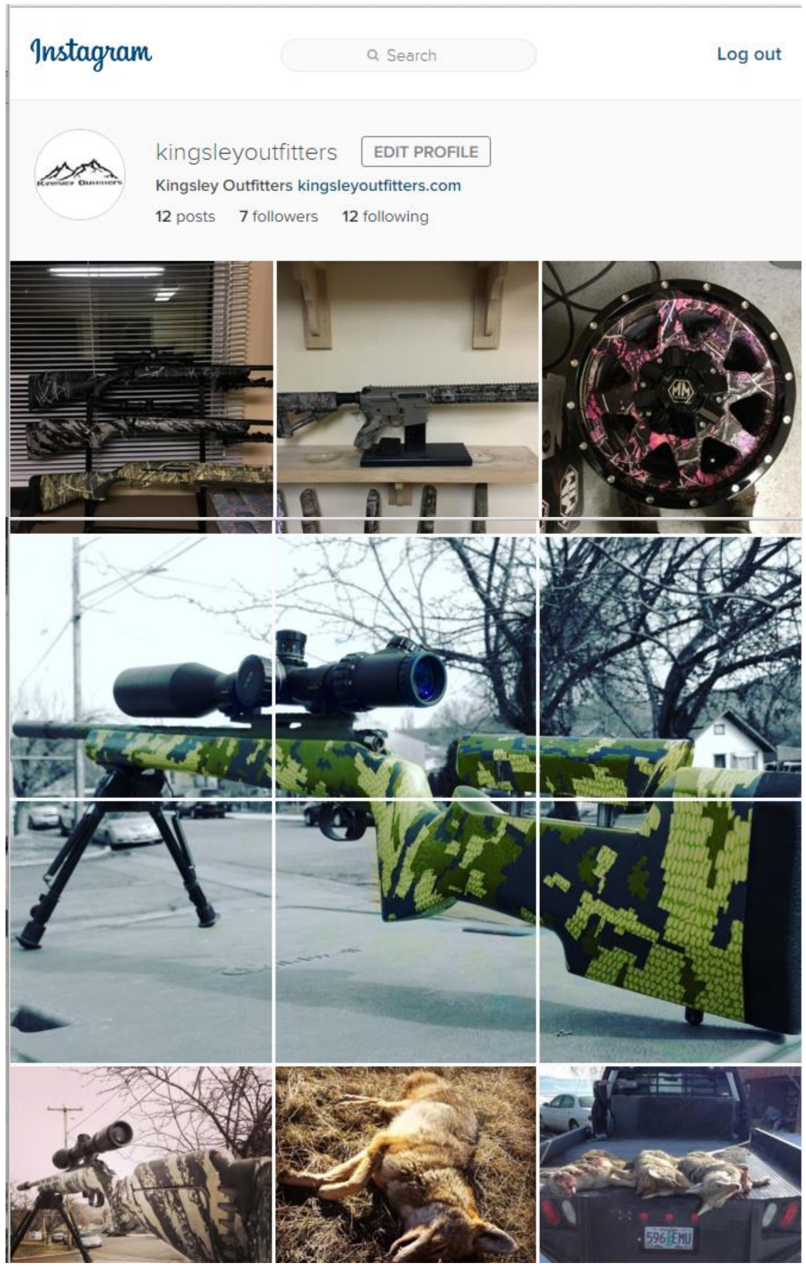


Figure 4. A screen capture from Kingsley Outfitters Instagram account.

Print ads

Another component of implementing the marketing efforts of Kingsley Outfitters was designing and distributing print ads. This includes brochures, flyers, and business cards with discounts offered. These documents can be viewed in the appendix of this report.

Logo Design

Designing the logo was an integral part of developing a brand and an identity for Kingsley Outfitters. This process and justification for this component have been discussed previously in this text. The final logo for Kingsley Outfitters can be viewed below. Alternate samples of the logo design can be viewed in the appendix of this report.

Figure 5. The final version of the Kingsley Outfitters logo.

Scheduled Hunts

In order to differentiate themselves in the market, Kingsley Outfitters has focused on target markets that are outside the traditional audiences for this industry. That target market includes student in Klamath County, particularly college students, which are an underserved market. In order to market their services effectively to this market, Kingsley Outfitters has partnered with the Oregon Tech Outdoor club to organize an event to offer Oregon Tech students a chance to hunt squirrels. This event has been scheduled for the Spring 2016 term.

Recommendations

Kingsley Outfitters would benefit greatly from a partnership with the Oregon Tech Outdoor club. Contact has been made with Rebekah Matteri concerning a potential partnership and she has expressed interest in pursuing that endeavor. Additional opportunities may lie in the KCC campus and perhaps even high schools in the area. These partnerships would exploit the redefined target market very directly, as students involved in these clubs share attributes with the market segments discussed previously in this report.

The biggest advantage of this model would be that the Outdoor club at Oregon Tech would organize all of it. They could handle registration, fees, liability waivers, and marketing efforts. Past the actual work of guiding students, it would be essentially free advertising and potentially very profitable for Kingsley Outfitters. Students and young adults also have the advantage of having a propensity for sharing on social media. This is an excellent opportunity to further advertise and connect and interact with customers who share photographs from their hunting trips on Facebook of Instagram. This advantage falls in line with his current desire of a low advertising budget.

Recommendations and Future Work

The project focused primarily on identifying core competencies and implementing the marketing efforts for the business. The next step for this project would be to sustain the marketing efforts in a way that leverages the niche market that Kingsley Outfitters serves and the way the company differs from its competitors.

In terms of social media, the future goal is to sustain the activity of the respective pages. In the 2012 book *Social Media Marketing: A Strategic Approach,* the authors outline some basic principles to follow in social media.

- Do research to figure out which platforms that the target markets are actively using. This can be very fluid and it is important to reevaluate.
- Integrate posts across all active platforms. This minimizes the effort and the time that it takes to share information and maximizes the amount of users reached.
- Be consistent in posting, aiming for two or three times per week on average.

- Be professional in social media because more and more, it is becoming the medium that customers gain their first impression from.
- Closely monitor content for editing errors and for impactful information. A post should almost always go along with a photo, a link, a video or an article.
- Engage your audience through social media and respond in a timely fashion. The primary advantage that social media has over traditional marketing is that it is social.
- Analyze the company's progress on social media using the built-in metrics. Pay special attention to which posts the users seemed to engage with most actively. (Barker, M. S., Barker, D., Bormann, N. F., & Neher, K., 2012).

Another course of action for future work on this project is maintaining and expanding partnerships. The primary partnership established in the course of the project was with the Oregon Tech Outdoor Program. There is an opportunity to create a relationship with other groups that might offer reoccurring business for Kingsley Outfitters.

Kingsley Outfitters also has an opportunity to expand the services offered to include scouting for big game in Southern Oregon. One of the identified target markets for Kingsley Outfitters is hunters that are working professionals with little to no time to go out and scout for a hunt before the season. There is a large potential market to break into that is currently unserved.

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Appendix

Figure 6. Logo Version number 1

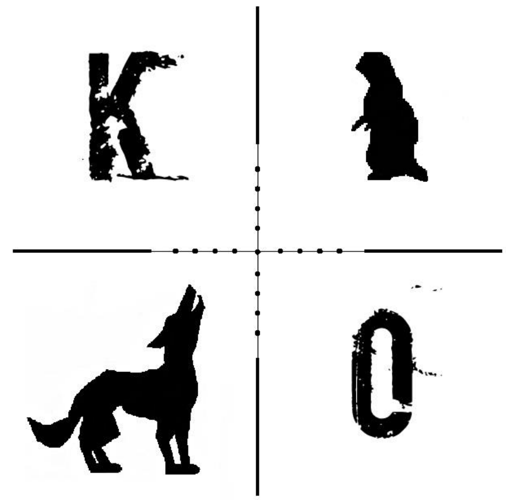

Figure 7. Logo Version number 6

Figure 8. Logo Version number 10

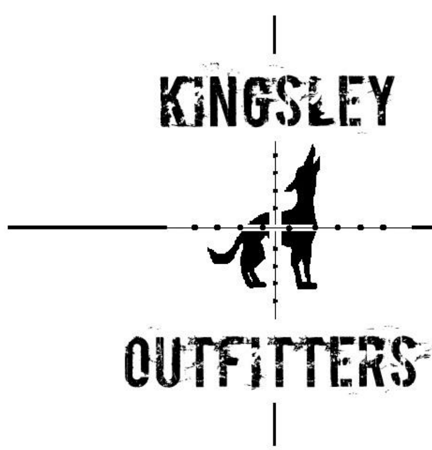

Figure 9. Logo Version number 11

Figure 10. Logo Version number 13

Figure 11. Logo Version number 16

Figure 12. Logo Version number 17

Figure 13. Logo Version number 21

Figure 14. Kingsley Outfitters Discount Business Card

Figure 15. The outside cover of the Kingsley Outfitters Brochure

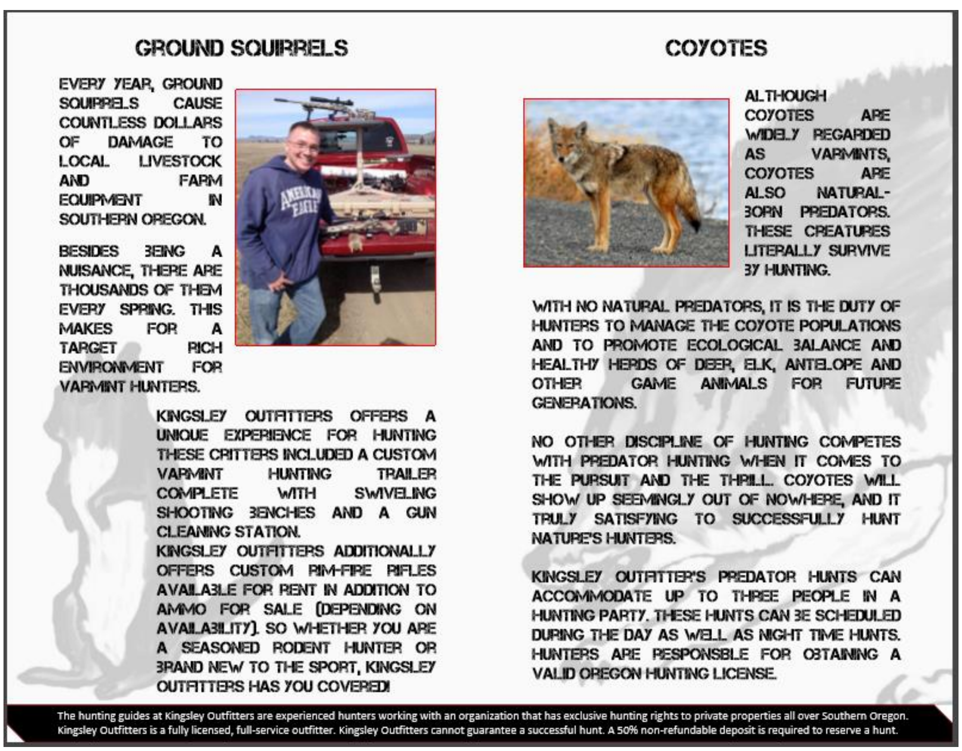

Figure 16. The inside cover of the Kingsley Outfitters brochure

Figure 17. Kingsley Outfitters flyer

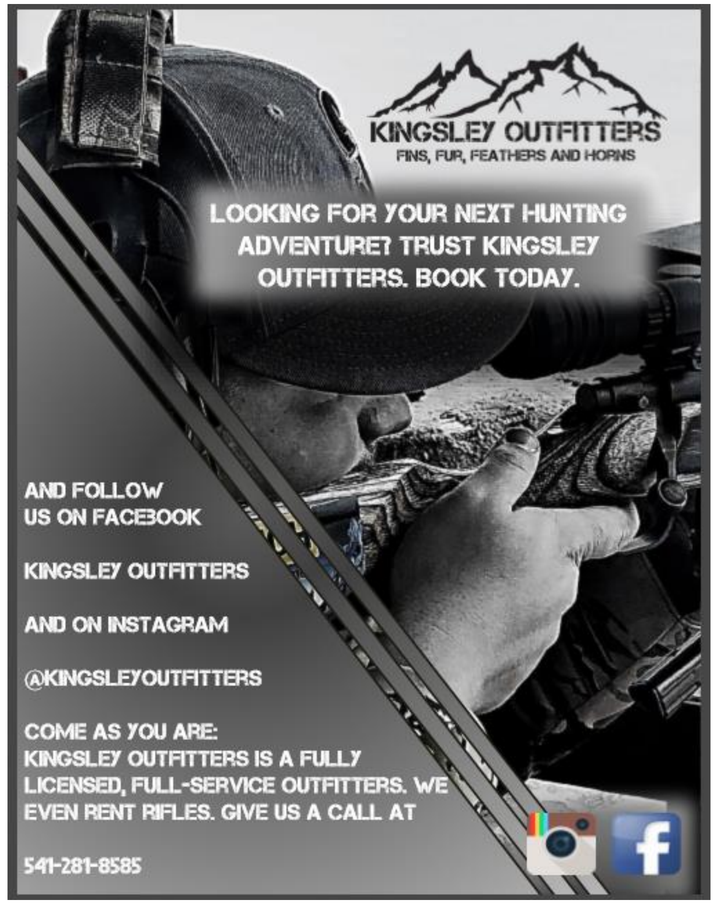

Figure 18. Another Kingsley Outfitters flyer

[Project Title]

[Name]

Presented to the Management Department Faculty

of Oregon Institute of Technology

in Partial Fulfillment of the Requirements for the Degree

Bachelor of Science in Management

Instructions: *Refer to this section often, do not remove until finalizing the report.*

This document is a template that that should be used to build your final senior project report. All instructions are in italics; the expectation is that all italic comments will be removed prior to submission, even this instruction section. APA formatting and citations are required for this document, please be sure to cite all work and assumptions with supporting research.

The entire report is to be written in the third person past tense. In that format, you will never use personal pronouns like "I" or "we" and you will always refer to what happened in the past, not in the present or future tense. The report describes and discusses what transpired during the course of completing your project so everything already happened, in the past. For example, instead of writing, "I met with the owner and conducted an informational interview" you would write, "An informational interview was conducted with the owner."

When you discuss recommendations for further work (which would occur in the future) you will need to use future tense as appropriate. For example, you might write, "The project success should be monitored and additional surveys should be administered and analyzed six and twelve months following initial implementation." If specific plans are in place for extending the project in the future you might write, "Additional foundations will be approached in an attempt to obtain the final $30,000 needed to complete the project."

Table of Contents

Appendices: Sometimes, materials that supplements the report content would be distracting in the body of the report. Material of this type should be included in the appendix.

Abstract

The abstract (executive summary) for the project goes here. It should include a brief introduction to the project, state its relevance, describe the approach taken, and provide a crisp summary of the most important elements and outcomes of the project. An abstract is accurate, non-evaluative, coherent, readable and concise. The summary should contain enough information for the reader to get the main idea of your project and decide whether to read the entire document or not. ***<u>This section is written after you have completed the project</u>*** *and should be one-half to one page in length, not indented, double-spaced.*

Keywords: word, word, word, word, word

(list four to six key words from the abstract that would summarize your report)

Name of your Report [Introduction – not bolded]

In this section, you will describe your project in terms of a ***problem facing an organization****. You will need to start by providing a brief description of the organization to give the reader context. This section should include an overview of the problem and how it effects the business. Clearly describe the compelling business case for the project.*

Project Overview

The project description and objective section should include the overarching goals of the project along with a project mission statement (such as benefits of the project, and how it is aligned with the sponsor's strategic plan).

Assumptions

Assumptions are circumstances and events that need to occur for the project to be successful, but are outside the total control of the project manager. Constraints are things that might restrict, limit, or regulate the project.

Resources

If there are any specific resources needed for the project, include this section. If there are no resource requirements beyond your typical student tools such as a computer etc. leave this section out of your charter.

Deliverables

Describe a tangible or intangible product or service produced as a result of the project that will be delivered to the sponsor.

Milestones/Timeline

Identify the project timeline and milestones (events that mark significant progress). You should plan to create this in a Gantt chart. See MS Project instructions.

Research and Project Method

Provide an overview of how you intend to research or approach this project. ***This section is critical to the success of your project since it lays out how you will continue with the project****. Start this by developing a simple research goal statement that includes - what and why. This will be further developed after you have some initial conversations with your sponsor, instructor and faculty mentor, conduct initial research on the topic, and complete your annotative bibliography. Once that is done, and need to develop an approach that will include secondary research and will likely include primary research and data collection. For example, if your project goal is to develop a marketing strategy, you will likely need to do some analysis of the industry, analyze current customer data for trends, and conduct primary research through stakeholder interviews, a customer survey or focus group. By laying this out now, you have developed the framework for your data collection phase of your project.*

Evaluation and Analysis Method

Once you determine your project research approach, then describe how you will evaluate and analyze this data. How will you compile the data you collected? What business methods and tools will you use? What specific techniques will you be using? Go back and review your notes from your past classes and discuss various methods with your instructor and faculty mentors. This will help you determine your evaluation and analysis methods. Again, if this is planned out well, you will have a framework for your analysis phase of your project.

Project Success Factors

Describe how the success of the project will be determined from the customer's perspective. The completion criteria should be in quantifiable/measurable terms so that there is no doubt as to the project's success. If the business objectives have been sufficiently quantified, *meeting them constitutes the successful completion criteria. Quantifiable measures of customer use and/or satisfaction with the final product also measure the successful completion of the project.*

Organizational and Industry Background

This section provides a full discussion of the organization and industry so you provide the reader with an understanding of the environment. Provide an overview of the organization by describing the organization's mission, vision, values, history, locations and products or services. Also, provide basic overview of the organization's ownership (sole proprietor, partnership, corporation (private, public or non-profit).

Industry

Conduct research about your sponsor's industry (i.e. healthcare, construction, retail etc.). Use the Mergent Intellect database (in the Oregon Tech library) and US census data https://www.census.gov/econ/ as well as other industry databases to provide a macro view of the industry in which your sponsor is doing business. Research on multiple scales such as local, national and globally to determine how this organization fits into the industry. Your goal is to understand more about the industry and, depending on your project, the location and customer demographics.

Organizational Culture, Structure and People

Describe the organization's culture, leadership, structure and human resources. For example, what are the cultural aspects of the organization? What is the management structure? Is the company team oriented or is it a top-down style? What are the skill set of the employees and the strengths and weaknesses of human resources? How many people do they *employ? Your goal is to provide an overall sense of the organization's management style and culture and how that can impact your project.*

Financial Management

Describe the general financial management of the organization. How are decisions made? How are budget's established and managed? Do they communicate financial or sales results with employees? What is the annual revenue? What other performance metrics are important to the organization? You may want to try to reach out to the person in charge of finance for the organization for a brief interview to learn more.

Marketing

Describe the products or services of the organization. Who are the customers and markets? Who is the consumer and target markets? What is the company's products positioning and distribution? How do they promote their product or services? You may want to try to reach out to the person in charge of marketing for a brief interview to learn more.

Information Technology

Provide an overview on the information technology employed by the organization. Is this a small organization that has basic e-mail and network or do they utilize a sophisticated system? Are they key databases that help them manage things like accounting transitions and human resources? Do they outsource or manage their technologies internally? How could your project be effected by the information technology structure?

Stakeholder Analysis

Describe and analyze all the stakeholders of the organization? Consider customers, vendors, suppliers, employees, community, and financial backers, regulatory agencies and the project team? What roles do they play and how are they affected by the success or failures of the *company? How are these stakeholders affected by your project? Discuss and analyze the legal and ethical issues related to the stakeholders, organization and your project. Are there any regulatory or environmental issues?*

Literature Review & Background

The literary review provides the reader with a background on your topic based on how others have researched this same problem. In other words, the goal is to provide a framework for your work by summarizing what other researchers and business professionals have learned.

Remaining Sections should be Customized to your Project

The remaining sections should be customized to your project. They should generally include your ***Research*** *(primary and secondary),* ***Analysis of the Data*** *as well as your* ***Results****. Be sure to be specific and measurable basing your results on data. This section should follow your* ***research and project plan****.*

Summary & Conclusions

This section is to describe what has been learned during this experience about the field of study (however this is not a personal reflection- this is what was learned from the research). What conclusions resulted? Describe not only your conclusions, but how you arrived at those conclusions. There is no room here for personal opinion but rather, use evidence, analysis, and reference to work in your literature review. When possible, refer to principles, concepts, theories, relationships, and generalizations formed from the data. Also, describe any limitations or uncertainties arising from your work.

Recommendations and Future Work

This section is a natural flow from the previous section. What needs to happen next? What next steps would you recommend to the client or to anyone picking up a similar project? If *there were a "part two" of your project, what would the next related project be? What new questions arose out of your work?*

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APA formatting- use APA publication manual or the Purdue OWL site

Appendix Example:

Table 1

Cost of Unionization

	Non-Union		Union		Total Differential	
Faculty Salary	$	7,803,700	$	8,662,107	$	901,327
Salary Driven Benefits	$	390,185	$	433,105		

Note: Faculty salaries represent 100 combined rank positions. Union rate is based on a 12 percent increase over the non-union rate. The salary-driven benefits represent retirement contribution based on a 5 percent employer contribution.

Note: APA also has specific formatting guidelines for tables.