Warrington College of Business
Faculty Meeting Agenda
Friday, November 5, 2004
3:30 p.m. ** 101 Stuzin

GENERAL FACULTY MEETING

1. October 8, 2004 Minutes presented for approval.

2. The Undergraduate Committee presents a new course for approval:

   New Course:
   GEB 3213 - Writing in Business
   - Credits: 3
   - Contact Hours 3
   - Description: Designed to teach business students fundamental written communication skills focusing on those areas central to professional writing in business.

3. Other

GRADUATE FACULTY MEETING

1. October 8, 2004 Minutes presented for approval.

2. The MBA Committee presents the following items for approval:

   New Courses:
   MAN 6591– Tactical Logistics Planning
   - Instructional Dept: DIS
   - Credits: 3 Credits
   - Contact Hrs: 3 Base Hours
   - Description: Focuses on distribution value chain planning, tactical logistics decisions in vehicle routing, inventory management and value chain contracts.

   MAN 6619 – International Logistics
   - Instructional Dept: DIS
   - Credits: 3 Credits
   - Contact Hrs: 3 Base Hours
   - Description: Strategic issues in managing international supply chains, managing of exchange rate and operating risks in global supply chains.

QMB 6711 – Business Process Analysis

- Instructional Dept: DIS
- Credits: 3 Credits
- Contact Hrs: 3 Base Hours
- Description: Critical business analytical approaches, including linear programming, project scheduling, waiting line theory and time-series analysis.

Course Number & Instruction Department Changes:

- Current Course Number: **MAR 5620** - Introduction to Managerial Statistics
- Course Number Change: **QMB 5301** - Introduction to Managerial Statistics
- Credits: 2 (no change)
- Instructional Dept: **NEW** - DIS
- Instructional Dept: **OLD** - MAR

- Current Course Number: **MAR 5621** - Advanced Managerial Statistics
- Course Number Change: **QMB 5302** - Advanced Managerial Statistics
- Credits: 2 (no change)
- Instructional Dept: **NEW** - DIS
- Instructional Dept: **OLD** - MAR

- Current Course Number: **MAR 5624** - Introduction to Managerial Statistics
- Course Number Change: **QMB 5305** - Introduction to Managerial Statistics
- Credits: 3 (no change)
- Instructional Dept: **NEW** - DIS
- Instructional Dept: **OLD** - MAR

3. The Promotion and Tenure Committee has revised the College Guidelines for 2004-2005, primarily adding provisions for review of Lecture track promotion. These guidelines are being presented to the College of Business Administration Faculty for approval.

4. Other

GENERAL FACULTY MEETING MINUTES
October 8, 2004

1. The General Faculty Meeting Minutes of April 7, 2004 were approved as distributed.

2. New faculty was introduced:
   -Jane Douglas, Writing
   -Fiona Barnes, Writing
   -Gwendolyn Lee, Management
   -Srikanth Paruchuri, Management **(REVISED SPELLING)**
   -Sarah Hamersma, Economics
   -Haijin Lin, Accounting
   -Xiangdong (Jenny) Tucker, Accounting **(REVISED SPELLING)**

3. The ISM 3004 was presented as an informational item. No discussion took place.

A motion was made and seconded to adjourn the meeting.

GRADUATE FACULTY MEETING MINUTES
October 8, 2004

1. The Graduate Faculty Meeting Minutes of April 7, 2004 were approved as distributed.

2. A motion was made and seconded to approve a new course:

   GEB 6972 – *International Business Final Project*
   -credits: 2
   -Contact Hours: .5/head
   -Prerequisite: MAN 6636-Global Strategic Management
   -Description: Capstone course for International Business program. Comprehensive analysis and information synthesis of a multinational corporation.

3. Changes to the MAIB program were presented as an informational item. No discussion took place.

4. The following announcements were made:

   -The President and BOT are working together looking at comparison of *students, faculty, research and facilities* with top 10 publics; the deficit is our quality of faculty – external compression outside of Florida. The two things that affect us are: measures used not really related to us; and, very little emphasis to close gap.

   -A new funding model has been worked out with the Provost: as tuition goes up our budget goes up; as graduate/undergraduate credit hours increase our budget goes up; off-book now under distance learning; the University gets the FTE from our South FL program, China program, distance learning, and UG program; WCBA can set aside $'s to build a graduate studies building; the College will still get raise money.

   -The South Florida program opened with 40 people (off-book).

   -The China agreement was approved for fall 2005 and eight faculty will be teaching.

A motion was made and seconded to adjourn the meeting.

Form UCC1
Florida Department of Education
Statewide Course Numbering System

NEW COURSE TRANSMITTAL FORM

(See instructions on reverse side)

PART I: TO BE COMPLETED BY THE INSTITUTION

Institution Name:	Institutional Code:	Instructional Unit or Department Name, Department Code and SAMAS Number:
University of Florida	001535	Business Administration, General - 011701000 - 17010100

Recommended SCNS Course Identification:
Discipline (SMA) 1 5 5 Prefix G E B Level 3 Course Number 2 1 3 Lab Code ____

Institution's Course Title: Professional Writing in Business

Effective Term (first date course will be offered): Spring 2005

Amount of Credit: 3 Type of Credit: ☒ College

If Repeatable Credit or Variable Credit: ____ total repeatable credit allowed ____ minimum / ____ maximum credit within a semester

Total Clock Hours: N/A

Contact Hour Base 3 or head count ____

Course Description (A course syllabus must be attached.):
Designed to teach business students fundamental written communication skills focusing on those areas central to professional writing in business.

Mark all that apply:
Rotating Topic ☐ yes ☒ no
S/U Only ☐ yes ☒ no
Repeatable for Credit ☐ yes ☒ no

Prerequisites: (This form does not update ISIS or registration prerequisite checking.)

Corequisites:

All faculty teaching this course have completed at least 18 graduate semester hours in the teaching discipline and hold at least a masters degree. ☒ Yes ☐ No

Degree Type (Mark all that apply.):
☐ Associate of Arts ☐ Graduate Students
☒ Baccalaureate ☐ Other (specify): ____

Gordon Rule Course?
Requires action by the General Education Council
☒ Yes 6000 Number of Words No

General Education Requirement (check all applicable): ~~Communications~~ Yes ~~Math~~ ~~Social Sciences~~
Requires action by the General Education Council ~~Humanities~~ ~~Natural Science~~

Category of Instruction: ☐ Introductory ☒ Intermediate ☐ Advanced

Department Contact, Telephone Number and PO Box: (Date) 8/23/04
SHARON HAUGHTON, 111 BRY-2-8436 X1225
Signature, Department Chair: (Date)

College Contact, Telephone Number and PO Box: (Date)
SAME
Signature, College Dean: (Date)

Signature, Graduate Dean (if applicable): (Date)
Signature, Registrar (Institutional Contact): (Date)

PART II: TO BE COMPLETED BY THE FACULTY DISCIPLINE COMMITTEE REPRESENTATIVE

Approved Course Classification (Prefix, Number, Lab Code):

If not the same as recommended by institution, please explain:

SCNS Course Title (if new):
Decade Title (if new):
Century Title (if new):

Signature, Faculty Discipline Committee Representative: Date:

PART III: SCNS STAFF USE ONLY

Signature, SCNS Staff Date Entered Correspondence Number

GEB 3213 – Professional Writing in Business
Syllabus

In business, where communication needs to be as clear as it is convincing, mastering the principles of effective, efficient writing is essential. GEB 3213 – Professional Writing in Business is designed to teach business students the fundamental written communication skills that will allow them to express their ideas effectively and efficiently, preparing them for the demands of the business workplace. This course focuses on three areas central to professional writing in business: knowledge of the types of writing central to business communication, mastery of the techniques for persuasive argumentation, and understanding of the fundamentals of writing clearly, specifically, and concisely.

The project-based writing assignments in this course ensure that students learn professional communication principles within different organizational contexts, as they work on assignments, cases, and projects drawn from everyday business situations. The course emphasizes both internal and external communication, as well as how to select style, formats, and approaches appropriately according to context and audience. Assignments include e-mails, memos, letters, resumes, and individual as well as team-written reports.

Course Format

- Students attend one live lecture per week on the fundamentals of business writing and stylistic principles. Lectures are held in Bryan 130 on Thursdays during period 10.
- Teaching Assistants teach two writing-intensive workshops each week on effective writing principles and strategies. During workshops, students discuss assigned readings, complete in-class writing and other exercises, critique sample documents and peers' writing, and make presentations.

Course Texts

- James Porter, Patricia Sullivan, Johndan Johnson-Eilola, *Professional Writing Online 2.0*, 2nd edition. Longman, 2004.
- James Porter, Patricia Sullivan, Johndan Johnson-Eilola, *Professional Writing Online Course Manual*. Longman Pearson, 2004.
- Jane Douglas, *College Writing CPR: 16 Principles for Writing Virtually Anything Effectively*. Longman Pearson, 2004.
- Christine Holt, Thomas Huckin, *The New Century Handbook*. 2nd edition. Longman, 2002.

Recognizing that professional workplace writing increasingly takes place online, we have selected as our primary resource an online text, *Professional Writing Online*, which offers a variety of real-world scenarios and opportunities for individual and team-based writing activities. *College Writing CPR* uses new research into neuroscience, cognition, and linguistics to provide writers with the essential stylistic tools for mastering clear, efficient, and highly effective writing. Finally, *The New Century Handbook* is a concise reference text that students use as a resource for learning and reviewing grammar, punctuation, and usage principles necessary for clear, correct writing.

Course Assignments

Students will analyze real-world scenarios to determine how and why a document serves its purpose in the workplace, discover the role of document design in information processing, and learn how to respond efficiently to clients' and colleagues' needs. The assignments, geared to both general and specialist audiences, provide practice in such essential career skills as problem solving, time management, and oral presentations.

Students complete the following graded writing assignments:

- Policy memo
- Plagiarism policy
- Instructions
- Policy memo
- Team report
- Proposal memo
- Progress report
- Sexual harassment policy rewrite and memo
- Resume and cover letter
- Power Point presentation
- Final assessment memo

Course Objectives

By the end of this course, students will know how to

- Structure sentences, paragraphs, and documents for maximum impact
- Better comprehend their professional roles and the communication tools needed in the business world
- Gear their writing towards a number of audiences, both internal and external to the workplace
- Assess how a variety of written communication styles affect the audience's reception of ideas
- Deploy useful strategies for writing essential workplace documents like memos, instructions, and reports
- Write collaboratively with teammates to produce a coherent and professional report
- Write and revise for optimal concision and clarity.

Attendance and Participation
Students are expected to attend all lectures and writing workshops because success in this course depends on intensive, continuous, and supervised writing practice. Writing is a skill, which means that the more you practice writing with guidance, the more your skills will improve. Because of the incremental and cumulative effect of ENC 3254, if a student misses 3 or more workshop sessions (for any reason), the student will be assigned a grade of E (failure) for the course. In addition, quizzes, in-class writing, group work, peer review and other in-class activities can not be made up.

Students are responsible for getting assignments in on their due dates. Papers are due at the beginning of class on the assigned date, and students must complete ALL assignments to pass the course. Students should complete readings and assignments included in the syllabus by the class following the assignment, unless otherwise indicated. Even with an excused absence, students should make every attempt to turn assignments in on time.

Academic Honesty
As a University of Florida student, your performance is governed by the UF Honor Code, available in its full form at http://www.reg.ufl.edu/01-02-catalog/student_life/. The Honor Code requires Florida students to neither give nor receive unauthorized aid in completing all assignments. Violations include cheating, plagiarism, bribery, and misrepresentation, all defined in detail at http://www.dso.ufl.edu/judicial/honestybrochure.htm. Plagiarism is the presentation of the words or ideas of another as one's own. You would commit plagiarism by using, without crediting the source:

1. Any part of another person's essay, speech, or ideas (even if paraphrased or expressed in your own words);

2. Any part of an article in a magazine, journal, newspaper, or any part of a book, encyclopedia, CD, online internet page, etc.

Students with Physical Disabilities
The University of Florida complies with the Americans with Disabilities Act. Students requesting classroom accommodation must first register with the Dean of Students Office. The Dean of Students Office will provide documentation to the student who must then provide this documentation to the Instructor when requesting accommodation.

General Education Learning Outcomes
GEB 3213 satisfies General Education requirements for both Composition (C) and Gordon Rule-Communication (E6). As a result, to fulfill the Composition requirement, GEB 3213 offers instruction in how to write with maximum clarity, organization, and efficiency, as well as how to adapt writing to the demands of a variety of genres, contexts, and audiences. To satisfy the E6 Gordon Rule requirement, GEB 3213 also requires students to complete at least 6,000 words of evaluated writing during the semester.

Form UCC1
Florida Department of Education
Statewide Course Numbering System

New Course Transmittal Form

(See instructions on reverse side)

Part I: To Be Completed By the Institution

Institution Name:	Institutional Code:	Instructional Unit or Department Name, Department Code and SAMAS Number:
University of Florida	001535	Decision & Information Sciences, 11707000

Recommended SCNS Course Identification:
Discipline (SMA) 1 3 9 Prefix M A N Level 6 Course Number 5 9 1 Lab Code ____

Institution's Course Title: Tactical Logistics Planning

Effective Term (first date course will be offered): Spring 2005

Amount of Credit: 3 Type of Credit: ☒ College

If Repeatable Credit or Variable Credit: ____ total repeatable credit allowed
____ minimum / ____ maximum credit within a semester

Total Clock Hours: N/A

Contact Hour Base 3 or head count ____

Course Description (A course syllabus must be attached.):
Focuses on distribution value chain planning, tactical logistics decisions in vehicle routing, inventory management and value chain contracts.

Mark all that apply:
Rotating Topic ☐ yes ☒ no
S/U Only ☐ yes ☒ no
Repeatable for Credit ☐ yes ☒ no

Prerequisites: (This form does not update ISIS or registration prerequisite checking.)

Corequisites:

All faculty teaching this course have completed at least 18 graduate semester hours in the teaching discipline and hold at least a masters degree. ☒ **Yes** ☐ **No**

Degree Type (Mark all that apply.):
☐ Associate of Arts ☒ Graduate Students
☐ Baccalaureate ☐ Other (specify): ____

Gordon Rule Course?
Requires action by the General Education Council
☐ Yes ____ ☒ No
Number of Words

General Education Requirement (check all applicable): ~~☐ Communications~~ ~~☐ Math~~ ~~☐ Social Sciences~~
Requires action by the General Education Council ~~☐ Humanities~~ ~~☐ Natural Science~~

Category of Instruction: ☐ Introductory ☐ Intermediate ☐ Advanced

Department Contact, Telephone Number and PO Box: (Date) Pat Brawner, 846-1374, PO 117169 6/10/04	Signature, Department Chair: (Date)
College Contact, Telephone Number and PO Box: (Date) Sharon Haughton, 392-2397 X1225	Signature, College Dean: (Date)
Signature, Graduate Dean (if applicable): (Date)	Signature, Registrar (Institutional Contact): (Date)

Part II: To Be Completed by the Faculty Discipline Committee Representative

Approved Course Classification (Prefix, Number, Lab Code):

If not the same as recommended by institution, please explain:

SCNS Course Title (if new): ____
Decade Title (if new): ____
Century Title (if new): ____

Signature, Faculty Discipline Committee Representative: ____ Date: ____

Part III: SCNS Staff Use Only

Signature, SCNS Staff ____ Date Entered ____ Correspondence Number ____

University of Florida
Warrington College of Business Administration
Department of Decision and Information Sciences

Tactical Logistics Planning

Instructor: Professor Asoo J. Vakharia

Telephone: (352) 392-8571 (Office - Direct Line)
(352) 392-5438 (Office - Fax)
(352) 392-9600 (Office - Secretary)
(352) 374-4848 (Home)
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e-mail: asoov@ufl.edu

Office Location: 355D Stuzin Hall

Mailing Address: Department of Decision and Information Sciences
Warrington College of Business Administration
University of Florida
POB 117169
Gainesville, FL 32611-7169

Course Description

The primary intent of this course is to introduce the student to the field of tactical logistics planning. In the current business environment, the management of logistics has grown in importance due to the increasing focus on managing the entire set of activities in a supply chain. From an operations perspective, logistics is concerned with ensuring that a company's products are available in the "right" place at the "right" time in the "required" quantities. Thus, the primary focus of logistics is on managing product inventories in the distribution channel and simultaneously coordinating the shipment (through various transportation media) of these inventories to the market place. More specifically, students in the course will be exposed to the problems related to:

- Routing Service Vehicles;
- Distribution Inventory Management; and
- Supply Chain Contracts.

A second dimension we will also explore is to examine logistics strategies in the global marketplace. Given the increasing focus on internationalization (in terms of sourcing, manufacturing and marketing), we will examine the following specific issues:

- Supplier networks;
- Global supply chains; and
- Risk management in global operations.

The pedagogical approach to be followed will be a combination of lectures (for communicating key concepts, theories, and analytical models) and case analysis (to demonstrate applicability). In general, students will be exposed to a set of issues and then be exposed to cases which illustrates an application of these issues in a business setting.

Instructional Materials

1. Text: Dornier, P-P, R. Ernst, M. Fender, and P. Kouvelis, *Global Operations and Logistics: Text and Cases*, John Wiley and Sons, Inc. NY. 1998.
2. Course Packet: Contains copies of the power point slides for each topic covered, and cases.

Case Analyses and Problem Assignments

All cases will be analyzed as a team effort. A case-report should be a maximum of 6 pages. Detailed instructions on what to include in a case report for this course are given on page 5 of this course outline. Cases not in the text are included in the course packet while questions to guide the analysis are in this course outline (pp. 3-5).

Grading Policy

The course grades will be determined ON A CURVE by assigning the following weights:

• Case Reports (Single Team – 2 @ 15%)	30%
• Case Presentation (Single Team)	15%
• Case Report (Two Teams)	15%
• Case Presentation (Two Teams)	10% (evaluated by class)
• In-Class Exam	30%

Tentative Course Schedule (subject to change)

August 17-18, 2003
Course outline/content; Introduction to the course.
Topics

- Vehicle Routing
- Distribution Inventory Management
- Inventory Management under Demand Certainty

September 12-14, 2003
Grocery Gateway Case – Case included in course packet (Team 1 will present the case and Teams 3 and 4 will submit a case report): Issues for presentation/report:

1. Is the Grocery Gateway business model sustainable? How much money is at stake currently and when sales reach 5,000 deliveries per day?
2. What is the capacity of Grocery Gateway's delivery operations? How many trucks will it need to handle 5,000 orders per day.
3. How much money can Grocery Gateway save by increasing the number of stops per hour from 2.7 to 4 at the current volumes?
4. What are the pros and cons of the three options identified by Dominique? What other options would you consider?
5. What option would you take and why? How would you sell your plan to Al Sellery and Claude Germain?

Tycos Instruments Case – Case included in course packet (Team 2 will present the case and Teams 5 and 6 will submit a case report): Issues for presentation/report:

1. Calculate Economic Order Quantities for each of the parts that use the 110-ton press.
2. Should Tycos invest in the quick-setup project for the 110-ton press?
3. If Tycos uses a Reorder Point System, what effect will the setup project have on reorder points?
4. Answer questions 1-3 for the dedicated press project.

For simplicity, assume that each project (i.e., the 110 press and the dedicated press project) is independent and an all-or-nothing decision. Thus, Tycos will either purchase 16 dies or none. Similarly, Tycos will purchase either 9 dedicated presses or none.

Topics

- Inventory Management under Demand Certainty (continued)
- Inventory Management under Demand Uncertainty
- Supply Chain Contracts

October 10, 2003
In-class exam. (Open book, Open Notes)

October 11-12, 2003
Topics:

- Global Operations and Logistics Strategies (Chapters 1 and 2 in Text)
- Supplier Networks (Chapters 5, 7, and 8 in the Text)

October 31, and November 1-2, 2003
Sport Obermeyer Case - Case included in course packet (Team 3 will present the case and Teams 1 and 2 will submit a case report). Issues for presentation/report:

1. Using the sample data given in Exhibit 10, make a recommendation for how many units of each style Wally Obermeyer should order during the initial phase of production. Assume all ten styles in the

sample problem are made in Hong Kong, and that Obermeyer's initial production commitment must be <u>at most</u> 10,000 units. Ignore price differences among styles in your initial analysis.

2. What operational changes would you recommend to Wally to improve performance?
3. How should Obermeyer management think (both short-term and long-term) about sourcing in Hong Kong versus China?

Bose Corporation (A): The JIT II Program Case – Case in text; see pages 157-165 (Team 4 will present the case and Teams 5 and 6 will submit a case report). Issues for presentation/report:

1. How do Bose's history, strategy, and sourcing policies affect supplier relations? Is Bose a good buyer?
2. Where is buying and selling done in this context?
3. Should Bose participate in the JIT II Program? Should G & F? What are the potential benefits and risks to both companies?

Cameron Auto Parts (A) – Revised Case – Case included in course packet (Team 5 will present the case and Teams 1 and 2 will submit a case report). Issues for presentation/report:

1. Should Cameron have licensed McTaggart or continued to export?
2. Was McTaggart a good choice as a licensee?
3. Was the royalty rate reasonable?

BMW: Globalizing Manufacturing Operations Case - Case in text; see pages 341-355 (Team 6 will present the case and Teams 3 and 4 will submit a case report). Issues for presentation/report:

1. What is the role of the Spartanburg Plant in BMW's global business strategy?
2. What are the priorities for Mr. Knizer?
3. What is your recommendation relating to the three options described in the case?

Topics:

- Risk Management in Global Operations (Chapter 9 in the Text)
- The Role of Taxes and Duties on Location and Sourcing Decisions
- Domestic/Global Logistics Strategies
  - Gray Markets: Causes and Cures(?)

<u>December 5, 2003</u>

Loctite Corporation – International Distribution Case – Case included in course packet (Teams 1 and 2 will jointly present the case and Teams 3 and 4 will jointly submit a case report). Issues for presentation/report:

1. What is Loctite's distribution strategy? How would you compare direct sales, independent distribution, captive distribution, and agent's for Loctite's products?
2. How does the distribution strategy differ for the North American and international markets?
3. What factors are driving Loctite's acquisition of it's international distribution channels?
4. What should Loctite do about distribution in Hong Kong?

Kuehne & Nagel in the Asia-Pacific Case – Case included in course packet (Teams 3 and 4 will jointly present the case and Teams 5 and 6 will jointly submit a case report). Issues for presentation/report:

1. How do you see K&N's environment changing?
2. Evaluate K&N and it's strategy. How does K&N compare to relevant competitiors?
3. What overall positioning should K&N seek? What should K&N do?

Zara: Fast Fashion Case – Case included in course packet (Teams 5 and 6 will jointly present the case and Teams 1 and 2 will jointly submit a case report). Issues for presentation/report:

1. With which of the international competitors listed in the case is it most interesting to compare Inditex's financial results? Why? What do these comparisons indicate about the companies' relative operating and capital efficiency?
2. How specifically do the distinctive features of Zara's business model affect it's operating economics? Specifically, compare Zara with an average retailer with similar posted prices. For

comparison purposes, assume that on average, retail selling prices are about twice as high as manufacturer's selling prices.

3. Link the key upstream activities (design, sourcing and manufacturing, and distribution) to downstream activities (merchandising, and store operations) in order to identify ways in which they create competitive advantage.
4. How might Zara "fail?" How sustainable is its competitive advantage in comparison to other apparel retailers?

Summary of Course Deliverables

Weekend of September 12-14, 2003
1 Case Presentation: Teams 1 and 2
1 Case Report: Teams 3,4,5, and 6.

Weekend of October 10-12, 2003
No specific deliverable but we do have an in-class exam on October 10, 2003

Weekend of October 31, and November 1-2, 2003
1 Case presentation: Teams 3,4,5, and 6
2 Case Reports: Teams 1, and 2.
1 Case Report: Teams 3,4,5, and 6.

Weekend of December 5, 2003
1 Case Presentations: Each "super-team" (1+2,3+4,5+6)
1 Case Report: Each "super-team" (1+2,3+4,5+6)

Instructions for Case Reports

1. *General*

Write the paper as if you were an external consultant writing a report to an extremely busy president of the company under study. If the president likes your report, you will not only receive the last portion of your fee, but you will also be retained (at a considerable additional fee) to help with the implementations of the recommendations of your report!

The report should be hard-hitting and persuasive. Read your report. Is it sufficiently persuasive to convince a tight-wad president to spend the money to implement your recommendations and to retain you for implementation purposes?

Be concise! Do not bore the president with descriptive material that does not lead to some point in your analysis. However, descriptive material is fine as long as it has some implications for your analysis and recommendations. A long-winded introduction describing the company's industry and environment would bore the president to tears. It is not necessary to describe every element of the business unless this is essential in your analysis and recommendations.

Be quick to the punch! Like most big-wigs, the president has a very limited attention span. After about the second page of the report, he/she starts to lose interest. Just give the president what he/she needs to know. For example, what are the problems, the causes of the problems and what must be done to solve them?

2. *Specifics*

- Descriptive Material: Descriptive material is a repeat of the facts of the case. Who? What? When? As a general rule, this should account for less that 15 % of the total content of the report unless it contributes substantially to your analysis.
- Analysis: This accounts for a major portion of the report. Specifically it answers How? and Why? questions. Determining what specific issues should be addressed in the analysis is the most challenging aspect of case analysis. Carrying out the analysis is typically less challenging. Discussion questions for the case are merely general guidelines for the important issues in the case. Merely answering the questions will not lead to a satisfactory analysis.
- Recommendations: This section follows naturally from the case analysis. If it does not, something is wrong with the analysis!! In this section, give the president something he/she can use. Suggestions which are infeasible will naturally get you thrown out of the office by Du..H the company bouncer!! Be decisive. There should be *absolutely no* "should possibly consider" in this section of the report.

Finally, attach as many Exhibits as you feel are necessary to support your computations and recommendations. Make sure to reference every Exhibit attached in the main body of the report.

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Statewide Course Numbering System

NEW COURSE TRANSMITTAL FORM

(See instructions on reverse side)

PART I: TO BE COMPLETED BY THE INSTITUTION

Institution Name:	Institutional Code:	Instructional Unit or Department Name, Department Code and SAMAS Number:
University of Florida	001535	Decision & Information Sciences, 11707000

Recommended SCNS Course Identification:
Discipline (SMA) 1 3 9 Prefix M A N Level 6 Course Number 6 1 9 Lab Code ____

Institution's Course Title: International Logistics

Effective Term (first date course will be offered): Spring 2005

Amount of Credit: 3 Type of Credit: ☒ College

If Repeatable Credit or Variable Credit: ____ total repeatable credit allowed ____ minimum / ____ maximum credit within a semester

Total Clock Hours: N/A

Contact Hour Base 3 or head count ____

Course Description (A course syllabus must be attached.):
Strategic issues in managing international supply chains, managing of exchange rate and operating risks in global supply chains.

Mark all that apply:
Rotating Topic ☐ yes ☒ no
S/U Only ☐ yes ☒ no
Repeatable for Credit ☐ yes ☒ no

Prerequisites: (This form does not update ISIS or registration prerequisite checking.)

Corequisites:

All faculty teaching this course have completed at least 18 graduate semester hours in the teaching discipline and hold at least a masters degree. ☒ Yes ☐ No

Degree Type (Mark all that apply.):
☐ Associate of Arts ☒ Graduate Students
☐ Baccalaureate ☐ Other (specify): ____

Gordon Rule Course?
Requires action by the General Education Council
☐ Yes ____ ☒ No
Number of Words

General Education Requirement (check all applicable):
Requires action by the General Education Council
~~☐ Communications~~ ~~☐ Math~~ ~~☐ Social Sciences~~
~~☐ Humanities~~ ~~☐ Natural Science~~

Category of Instruction: ☐ Introductory ☐ Intermediate ☐ Advanced

Department Contact, Telephone Number and PO Box: (Date)	Signature, Department Chair: (Date)
Pat Brawner, 846-1374, PO 117169 6/10/04	
College Contact, Telephone Number and PO Box: (Date)	Signature, College Dean: (Date)
Sharon Haughton, 392-2397 X1225	
Signature, Graduate Dean (if applicable): (Date)	Signature, Registrar (Institutional Contact): (Date)

PART II: TO BE COMPLETED BY THE FACULTY DISCIPLINE COMMITTEE REPRESENTATIVE

Approved Course Classification (Prefix, Number, Lab Code):

If not the same as recommended by institution, please explain:

SCNS Course Title (if new):

Decade Title (if new):

Century Title (if new):

Signature, Faculty Discipline Committee Representative: Date:

PART III: SCNS STAFF USE ONLY

Signature, SCNS Staff Date Entered Correspondence Number

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University of Florida
Warrington College of Business Administration
Department of Decision and Information Sciences

International Logistics

Instructor: Professor Asoo J. Vakharia

Telephone: (352) 392-8571 (Office - Direct Line)
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Warrington College of Business Administration
University of Florida
POB 117169
Gainesville, FL 32611-7169

Course Description

The primary intent of this course is to introduce the student to the field of logistics planning and strategy. In the current business environment, the management of logistics has grown in importance due to the increasing focus on managing the entire set of activities in a supply chain. From an operations perspective, logistics is concerned with ensuring that a company's products are available in the "right" place at the "right" time in the "required" quantities. Thus, the primary focus of logistics is on managing product inventories in the distribution channel and simultaneously coordinating the shipment (through various transportation media) of these inventories to the market place.

The course will initial cover three planning problems in logistics networks: routing of service vehicles; distribution inventory management; and supply chain contracts. Once we have a general understanding of these core concepts, our focus will shift to understanding how we can facilitate the development of logistic strategies in the global marketplace. Given the increasing focus on internationalization (in terms of sourcing, manufacturing and marketing), we will examine the following specific issues:

- Supplier networks;
- Global supply chains; and
- Risk management in global operations.

The pedagogical approach to be followed will be a combination of lectures (for communicating key concepts, theories, and analytical models) and case analysis (to demonstrate applicability). In general, students will be exposed to a set of issues and then be exposed to cases to illustrate an application of these issues in a business setting.

Instructional Materials

1. Text: Dornier, P-P, R. Ernst, M. Fender, and P. Kouvelis, *Global Operations and Logistics: Text and Cases*, John Wiley and Sons, Inc. NY. 1998.
2. Course Packet: Contains copies of the power point slides for each topic covered, and cases.

Case Analyses

All cases will be analyzed as a team effort. A case-report should be a maximum of 6 pages (single-spaced, minimum 10 pt font). Detailed instructions on what to include in a case report for this course are given on page 6 of this course outline. Cases not in the text are included in the course packet.

Grading Policy

The course grades will be determined ON A CURVE by assigning the following weights:

• Take-Home Exam	35%
• Case Reports (2 @ 15%)	30%
• Case Presentation (2 @ 10%)	20%
• Peer Team Evaluations	10%
• Class Participation	5%

Course Schedule (subject to change)

April 3-4, 2004

Course outline/content; Introduction to the course.

Topics:

- Vehicle Routing
- Distribution Inventory Management
- Inventory Management under Demand Certainty

April 30, May 1-2, 2004

Topics:

- Inventory Management under Demand Certainty (continued)
- Inventory Management under Demand Uncertainty
- Supply Chain Contracts

Take-Home Exam will be handed out at the end of the class on May 2, 2004. This will be due at the beginning of class on May 28, 2004.

May 28-30, 2004

Merloni Elettrodomestici SpA: The Transit Point Experiment Case (Course Packet). Issues for presentation/report:

1. What are the costs and benefits of Merloni's current distribution system? Of a transit-point-based distribution system?
2. Should Merloni replace its original network of regional warehouses with transit points? If so, what contingency plans and support systems are necessary to support the new logistics network? If not, what changes would you recommend Merloni make in its distribution system?

Team 1 will present the case to the class and Team 3 will hand in a written case-report.

Barilla SpA (A) Case (Course Packet). Issues for presentation/report:

1. Diagnose the underlying causes of the difficulties that the JITD Program was created to solve. What are the benefits and drawbacks of this program?
2. What conflicts and barriers internal to Barilla does the JITD Program create? What causes these conflicts? How should Giorgio Maggiali deal with these conflicts/barriers?
3. As a customer, what is your response to the JITD?
4. In the environment that Barilla operated in 1990, do you believe JITD (or a similar program) would be feasible and/or effective? If so, which customers should be targeted next and how would you convince them that the JITD Program was worth trying? If not, what alternatives would you suggest to combat the difficulties faced by Barilla's operating system?

Team 4 will present the case and Team 5 will submit a case report.

Bull Group Case (Text): Redefine the structure of the physical distribution network of the Bull Group to "optimize" upstream and downstream flows.

Instructor will lead case discussion.

Topics:

- Global Operations and Logistics Strategies (Chapters 1 and 2 in Text).
- Supplier Networks and International Sourcing Decisions (Chapters 5, 7, and 8 in the Text).

June 25-27, 2004

Bose Corporation (A): The JIT II Program Case (Text). Issues for presentation/report:

1. How do Bose's history, strategy, and sourcing policies affect supplier relations? Is Bose a good buyer?
2. Where is buying and selling done in this context?

3. Should Bose participate in the JIT II Program? Should G & F? What are the potential benefits and risks to both companies?

Team 5 will present the case and Team 1 will submit a case report.

Sport Obermeyer Case (Course Packet). Issues for presentation/report:

1. Using the sample data given in Exhibit 10, make a recommendation for how many units of each style Wally Obermeyer should order during the initial phase of production. Assume all ten styles in the sample problem are made in Hong Kong, and that Obermeyer's initial production commitment must be at most 10,000 units. Ignore price differences among styles in your initial analysis.
2. What operational changes would you recommend to Wally to improve performance?
3. How should Obermeyer management think (both short-term and long-term) about sourcing in Hong Kong versus China?

Team 3 will present the case and Team 4 will submit a case report.

BMW: Globalizing Manufacturing Operations Case (Text)- Case in text. Issues for presentation/report:

1. What is the role of the Spartanburg Plant in BMW's global business strategy?
2. What are the priorities for Mr. Knizer?
3. What is your recommendation relating to the three options described in the case?

Instructor will lead case discussion.

Topics:

- Risk Management in Global Operations (Chapter 9 in the Text)
- The Role of Taxes and Duties on Location and Sourcing Decisions
- Domestic/Global Logistics Strategies
- Gray Markets: Causes and Cures (?)

July 24, 2004

Zara: Fast Fashion Case (Course Packet). Issues for presentation/report:

1. With which of the international competitors listed in the case is it most interesting to compare Inditex's financial results? Why? What do these comparisons indicate about the companies' relative operating and capital efficiency?
2. How specifically do the distinctive features of Zara's business model affect it's operating economics? Specifically, compare Zara with an average retailer with similar posted prices. For comparison purposes, assume that on average, retail selling prices are about twice as high as manufacturer's selling prices.
3. Link the key upstream activities (design, sourcing and manufacturing, and distribution) to downstream activities (merchandising, and store operations) in order to identify ways in which they create competitive advantage.
4. How might Zara "fail?" How sustainable is its competitive advantage in comparison to other apparel retailers?

Team 1 will present the case, and Team 3 will turn in a written report.

Cameron Auto Parts (A) – Revised Case (Course Packet). Issues for presentation/report:

1. Should Cameron have licensed McTaggart or continued to export?
2. Was McTaggart a good choice as a licensee?
3. Was the royalty rate reasonable?

Team 4 will present the case, and Team 5 will turn in a written report.

Loctite Corporation – International Distribution Case (Course Packet). Issues for presentation/report:

1. What is Loctite's distribution strategy? How would you compare direct sales, independent distribution, captive distribution, and agent's for Loctite's products?
2. How does the distribution strategy differ for the North American and international markets?
3. What factors are driving Loctite's acquisition of it's international distribution channels?
4. What should Loctite do about distribution in Hong Kong?

Team 3 will present the case, and Team 1 will turn in a written report.

Supply Chain Management at World Co., Ltd. Case (Course Packet). Issues for presentation/report: Examine the features of fashion apparel retailing in Japan. How can a company use its supply chain to compete in this environment?

1. Identify the salient aspects of World Co's supply chain focusing on the processes for manufacturing, demand forecasting and inventory planning.
2. How do the features of this supply chain explain the company's remarkably short lead times (as compared to US apparel supply chains)?
3. Can the processes of World Co be replicated at other apparel companies? What about non-apparel supply chains? Identify potential barriers.

Team 5 will present the case, and Team 4 will turn in a written report.

Instructions for Case Reports

1. *General*
Write the paper as if you were an external consultant writing a report to an extremely busy president of the company under study. If the president likes your report, you will not only receive the last portion of your fee, but you will also be retained (at a considerable additional fee) to help with the implementations of the recommendations of your report!

The report should be hard-hitting and persuasive. Read your report. Is it sufficiently persuasive to convince a tight-wad president to spend the money to implement your recommendations and to retain you for implementation purposes?

Be <u>concise</u>! Do not bore the president with descriptive material that does not lead to some point in your analysis. However, descriptive material is fine as long as it has some implications for your analysis and recommendations. A long-winded introduction describing the company's industry and environment would bore the president to tears. It is not necessary to describe every element of the business unless this is essential in your analysis and recommendations.

Be quick to the punch! Like most big-wigs, the president has a very limited attention span. After about the second page of the report, he/she starts to lose interest. Just give the president what he/she needs to know. For example, what are the problems, the causes of the problems and what must be done to solve them?

2. *Specifics*

- Descriptive Material: Descriptive material is a repeat of the facts of the case. Who? What? When? As a general rule, this should account for less that 15 % of the total content of the report unless it contributes substantially to your analysis.
- Analysis: This accounts for a major portion of the report. Specifically it answers How? and Why? questions. Determining what specific issues should be addressed in the analysis is the most challenging aspect of case analysis. Carrying out the analysis is typically less challenging. Discussion questions for the case are merely general guidelines for the important issues in the case. Merely answering the questions will not lead to a satisfactory analysis.
- Recommendations: This section follows naturally from the case analysis. If it does not, something is wrong with the analysis!! In this section, give the president something he/she can use. Suggestions which are infeasible will naturally get you thrown out of the office by Du..H the company bouncer!! Be decisive. There should be *absolutely no* "should possibly consider" in this section of the report.

Finally, attach as many Exhibits as you feel are necessary to support your computations and recommendations. Make sure to reference every Exhibit attached in the main body of the report.

Form UCC1
Florida Department of Education
Statewide Course Numbering System

NEW COURSE TRANSMITTAL FORM

(See instructions on reverse side)

PART I: TO BE COMPLETED BY THE INSTITUTION

Institution Name:	Institutional Code:	Instructional Unit or Department Name, Department Code and SAMAS Number:
University of Florida	001535	Decision & Information Sciences, 11707000

Recommended SCNS Course Identification:
Discipline (SMA) _ _ _   Prefix Q M B   Level 6   Course Number 7 1 1   Lab Code ____

Institution's Course Title: Business Process Analysis

Effective Term (first date course will be offered): Spring 2005

Amount of Credit: 3   Type of Credit: ☒ College

If Repeatable Credit or Variable Credit: _____ total repeatable credit allowed
_____ minimum / _____ maximum credit within a semester

Total Clock Hours: N/A

Contact Hour Base 3   or head count _____

Course Description (A course syllabus must be attached.):
Critical business analytical approaches, including linear programming, project scheduling, waiting line theory, and time-series analysis.

Mark all that apply:

Rotating Topic	☐ yes	☒ no
S/U Only	☐ yes	☒ no
Repeatable for Credit	☐ yes	☒ no

Prerequisites: (This form does not update ISIS or registration prerequisite checking.)

Corequisites:

All faculty teaching this course have completed at least 18 graduate semester hours in the teaching discipline and hold at least a masters degree. ☒ **Yes** ☐ **No**

Degree Type (Mark all that apply.):
☐ Associate of Arts   ☒ Graduate Students
☐ Baccalaureate   ☐ Other (specify): __________

Gordon Rule Course?
Requires action by the General Education Council
☐ Yes __________ ☒ No
Number of Words

General Education Requirement (check all applicable): ~~☐ Communications~~ ~~☐ Math~~ ~~☐ Social Sciences~~ ~~☐ Humanities~~ ~~☐ Natural Science~~
Requires action by the General Education Council

Category of Instruction: ☐ Introductory ☐ Intermediate ☐ Advanced

Department Contact, Telephone Number and PO Box: (Date)	Signature, Department Chair: (Date)
Pat Brawner, 846-1374, PO 117169 6/10/04	
College Contact, Telephone Number and PO Box: (Date)	Signature, College Dean: (Date)
Sharon Haughton, 392-2397 X1225	
Signature, Graduate Dean (if applicable): (Date)	Signature, Registrar (Institutional Contact): (Date)

PART II: TO BE COMPLETED BY THE FACULTY DISCIPLINE COMMITTEE REPRESENTATIVE

Approved Course Classification (Prefix, Number, Lab Code):

If not the same as recommended by institution, please explain:

SCNS Course Title (if new): __________
Decade Title (if new): __________
Century Title (if new): __________

Signature, Faculty Discipline Committee Representative: Date:

PART III: SCNS STAFF USE ONLY

Signature, SCNS Staff   Date Entered   Correspondence Number

The University of Florida
Warrington College of Business Administration
Department of Decision and Information Sciences

Business Process Analysis

Instructor:	Professor Asoo J. Vakharia
Office:	Stuzin 343
Phone:	(352) 392-8571 (office)
	(352) 392-5438 (office-fax)
	(352) 374-4848 (home)
	(352) 374-6809 (home-fax)
e-mail:	vakharaj@notes.cba.ufl.edu

Course Description and Objectives

Analytical approaches for solving complex business problems are an integral component of the tool-box for any process/functional manager. It has been well documented that a mere exposure and knowledge of the existence of such tools tends to facilitate decision-making. However, what is often ignored is that none of these tools replaces managerial insight and/or decisions but simply provides a mechanism by which trade-offs from each alternative can be quantified and evaluated. The focus of this course is to introduce analytical methods that can be successfully applied to evaluate business decisions in multiple process/functional areas. Given that today's manager has access to a desktop (or laptop) computer, we will also focus on solving models for addressing complex business problems using one advanced feature in EXCEL (referred to as Solver). By the end of this course, I expect each one of you to be able to:

- Model typical business problems using the analytical approaches studied in this course;
- Use EXCEL (Solver) to obtain solutions to the models developed; and
- Analyze the solutions obtained in order to identify the impact of key parameters specified in the model.

In order to achieve these objectives, we will:

- Start by understanding the conceptual foundations behind each analytical method through a somewhat simple but "real" example.
- Develop and solve more comprehensive models using each method; and
- Analyze the solutions to obtain insights into the business problem.

During this course, I hope that each one of you is willing to learn the analytical approaches we will discuss (in terms of concepts, models and solutions, and insights). Once we all have a general understanding of these methods, then we can jointly discuss some of the questions that each of you may have regarding these tools. Finally, each team of students will be required to identify a specific problem we can jointly model and analyze using one or more of these approaches.

Course Text

Practical Management Science: Spreadsheet Modeling and Applications (2nd Edition) by Wayne L. Winston and S. Christian Albright, Duxury Press, 2001.

Assignments and Cases

Given the analytical nature of this course, I will try to reinforce understanding of the material using assignments and short cases. The assignments will be primarily problem solving and will be turned in individually by each student. The short cases will be analyzed in your Program teams.

Term Project

The term project will involve modeling an actual business application using one or more of the analytical approaches that we will cover during the course. This project will be completed in your Program teams and it will be presented to the rest of the class on the last class day.

Course Grade

Final grades will be assigned ON A CURVE with the following weights assigned to assignments, cases, and the term project:

Assignments	35%
Cases	45%
Term Project	20%

Approximate Course Schedule

Sunday, April 1, 2001
Topics: Introduction to the Course, Introduction to Linear Programming , Linear Programming, Introduction to EXCEL Solver and SolverTable
Reading: Chapter 3

Sunday, April 22, 2001
Assignment 1 due (Individual submission)
Chapter 3 problems # 12, 14, 15, 16, 17, 20, 21, 26, 27.

Friday, April 27, 2001
Topic: Linear Programming Applications
Reading: Class notes and Chapter 4

Saturday, April 28, 2001
Topic: Linear Programming Applications, The Production Planning Decision
Reading: Chapter 4 and Class Notes

Sunday, April 29, 2001
Topic: The Production Planning Decision
Reading: Class Notes

Sunday, May 20, 2001
1. **Assignment 2 due (Individual submission)**
   Chapter 3 problems # 30, 31, 34, 35, 40, 42
2. **Case Set Due (Team submissions)**
   Case 1: Lakefield Corporation's Oil Trading Desk (Case 4.1 in Chapter 4)
   Case 2: Foreign Currency Trading (Case 4.2 in Chapter 4)

Friday, May 25, 2001
Topic: Relative Productivity Assessment: Data Envelopment Analysis
Reading: Chapter 4

Saturday, May 26, 2001
Topic: Project Planning and Scheduling
Reading: Chapter 5

Sunday, May 27, 2001
Topic: Project Planning and Scheduling
Reading: Chapter 5

Sunday, June 17, 2001
1. **Assignment 3 due (Individual submission)**
   Chapter 4 problems # 50, 51, 52, 53
2. **Case Set Due (Team submissions)**
   Case 3: Insurance Company Branch Efficiency Assessments
   Case 4: Perting a Pump Unit

Friday, June 22, 2001
Topic: The Forecasting Decision
Reading: Chapter 16

Saturday, June 23, 2001
Topic: The Forecasting Decision, The Capacity Planning Decision
Reading: Chapter 16, Chapter 14

Sunday, June 24, 2001
Topic: The Capacity Planning Decision
Reading: Chapter 14

Sunday, July 15, 2001

1. **Assignment 4 due (Individual submission)**
   Handout problems on Capacity Planning
2. **Case Due (Team submission)**
   Case 5: Marriott Rooms Forecasting.

Friday, July 20, 2001
In-Class Team Presentations.

Form UCC2
Florida Department of Education
Statewide Course Numbering System

COURSE TERMINATION OR CHANGE TRANSMITTAL FORM

(See instructions on reverse side)

PART I: TO BE COMPLETED BY THE INSTITUTION

Institution:	Institutional Code:	Instructional Unit or Department Name, Department Code and SAMAS Number:
University of Florida	001535	MARKETING, 11708000

Current SCNS Course Identification:
Discipline (SMA) 140 Prefix MAR Level 5 Course Number 620 Lab Code ____
Institution's Course Title: Introduction to Managerial Statistics

PART II: REQUESTED ACTIONS

Terminate Current Course ☐ Yes **Date Termination Effective:** ____

NEW SCNS Course Identification: (Complete all appropriate areas)
NEW Discipline (SMA) 111 **Prefix** QMB **Level** 5 **Course Number** 301 **Lab Code** ____
NEW Institution Course Title (if applicable): Introduction to Managerial Statistics

EFFECTIVE TERM FOR CHANGES: (Mo/Yr) Summer 2005

Other Items to Change	Change From	Change To
Amount of Credit	N/A (2)	N/A
Type of Credit	N/A	N/A
Total Clock Hours (Contact Hour Base or Head Count)		
Type of Degree	N/A	N/A
Gordon Rule	N/A	N/A
General Ed Requirement	N/A (areas)	N/A (areas)
Prerequisites/Corequisites (This form does not update ISIS or registration prerequisite checking.)		

Change of Course Description (Course syllabus must be attached):

Mark any changes that apply:
Rotating Topic ☐ yes ☐ no
S/U Only ☐ yes ☐ no
Repeatable for Credit ☐ yes ☐ no

Department Contact, Telephone Number and PO Box: (Date) Pat Brawner, 846-1374, 117169 8/30/04	Signature, Department Chair: (Date)
College Contact, Telephone Number and PO Box: (Date) Sharon Haughton, 2-2397 X1225	Signature, College Dean: (Date)
Signature, Graduate Dean (if applicable): (Date)	Signature, Registrar (Institutional Contact): (Date)

PART III: TO BE COMPLETED BY THE FACULTY DISCIPLINE COMMITTEE REPRESENTATIVE

Approved Course Classification (Prefix, Number, Lab Code):

If not the same as recommended by institution, please explain:

SCNS Course Title (if new):
Decade Title (if new):
Century Title (if new):

Signature, Faculty Discipline Committee Representative Date

PART IV: SCNS STAFF USE ONLY

Signature, SCNS Staff Date Entered Correspondence Number

T:/Admin/CourseChangeForm.pmd Rev. 09/02

QMB 5301 *Introduction to Managerial Statistics*

UF MBA PROGRAM ***Summer A, 2004***

INSTRUCTOR: Dr. Patrick Thompson
E-mail: Pat Thompson/CBA

Phone: (352) 392-9731
Home: (352) 337-9157

HOURS: MW 9:30-NOON; at other times, eMail is the best way to reach me.

TEXTBOOK: *Statistics for Managers Using Microsoft Excel,* 4th Edition, David Levine, David Stephan, Timothy Krehbiel and Mark Berenson, Prentice-Hall 2004.

OBJECTIVES

It looks like all of you have taken a previous statistics course. You will find that this course is different. We will not spend any time memorizing formulae and crunching numbers on a calculator. The text comes with a nice add-in for Excel that will do all of that. We will concentrate on exploring the data, questioning our assumptions and interpreting our results. Choosing procedures will also be important but learning a lot of theory will not.

PROCEDURES DURING LECTURE

Each week I will give you an outline of what we will cover next time, and will assign specific readings. You do not have to learn the material ahead of time, but at least a light skimming is useful. In lecture, we will discuss the high points, work examples and interpret the results. I will ask you to take part in these discussions, and you will find class runs much smoother when you do.

We will typically meet for about 1:15 of lecture, take a break, then wrap up with another 1:15 of lecture. I know that I have you at the end of a day in which you have almost five hours of class. I will try to keep the second hour as light as possible with lots of examples to work.

EXAMS, HOMEWORK AND GRADING

During each class meeting, I will give you a set of problems to look at before the next class. You may do these individually, with your team, with a friend or with an enemy. I will not collect or grade these. Many of the even-numbered problems have an answer at the back of the book, starting on page 793. I will try to go over any murky points in class, particularly if you let me know you are having trouble.

I will give you three or four assignments to hand in. You may do these with your group, if you wish (if you do, turn in one paper with everybody's name on it). These collectively will be thirty percent of your grade.

Forty percent of your grade will be from the in-class (individual) midterm. This is tentatively scheduled for May 28. It will be open-book, open-notes and you will need to use your laptops.

The remaining thirty percent of your grade will come from the final exam, scheduled for June 16. I plan on this being a team final. I will give you a set of problems to work on collectively and you will turn in a collective solution. Teams with three members will be required to turn in fewer problems than teams with four members.

I cannot give you a specific grading scale, but I expect to give out at least 50% A's. Let me just say that I don't expect you to be a statistician coming out of this course.

COURSE SCHEDULE

DATE	TOPIC	Chapters in LSKB
May 3	Software Installation	
	Numerical Descriptive Measures	Chapter 3
May 5	Probability	Chapters 4 and 5
May 10	Normal Distribution	Chapter 6
May 12	Interval Estimation	Chapter 7
May 17	One-Sample Hypothesis Tests	Chapter 8
May 19	Statistical Quality Control	Chapter 17
May 24	Midterm Exam	
May 26	Two-Sample Tests	Chapter 9
May 31	MEMORIAL DAY (No Lecture)	
June 2	Multiple Sample Comparison	Chapter 10
June 7	Tests with Categorical Data	Chapter 11
June 9		
June 14/16	Team Final Exam	

Form UCC2
Florida Department of Education
Statewide Course Numbering System

COURSE TERMINATION OR CHANGE TRANSMITTAL FORM

(See instructions on reverse side)

PART I: TO BE COMPLETED BY THE INSTITUTION

Institution:	Institutional Code:	Instructional Unit or Department Name, Department Code and SAMAS Number:
University of Florida	001535	MARKETING, 11708000

Current SCNS Course Identification:
Discipline (SMA) 1 4 0 Prefix M A R Level 5 Course Number 6 2 1 Lab Code ___
Institution's Course Title: Advanced Managerial Statistics

PART II: REQUESTED ACTIONS

Terminate Current Course ☐ **Yes Date Termination Effective:** ______

NEW SCNS Course Identification: (Complete all appropriate areas)
NEW Discipline (SMA) 1 1 1 **Prefix** Q M B **Level** 5 **Course Number** 3 0 2 **Lab Code** ___
NEW Institution Course Title (if applicable): Advanced Managerial Statistics

EFFECTIVE TERM FOR CHANGES: (Mo/Yr) Summer 2005

Other Items to Change	Change From	Change To
Amount of Credit	N/A (2)	N/A
Type of Credit	N/A	N/A
Total Clock Hours (Contact Hour Base or Head Count)		
Type of Degree	N/A	N/A
Gordon Rule	N/A	N/A
General Ed Requirement	N/A (areas)	N/A (areas)
Prerequisites/Corequisites (This form does not update ISIS or registration prerequisite checking.)		

Change of Course Description (Course syllabus must be attached):

Mark any changes that apply:
Rotating Topic ☐ yes ☐ no
S/U Only ☐ yes ☐ no
Repeatable for Credit ☐ yes ☐ no

Department Contact, Telephone Number and PO Box: (Date) Pat Brawner, 846-1374, 117169 8/30/04	Signature, Department Chair: (Date)
College Contact, Telephone Number and PO Box: (Date) Sharon Haughton, 2-2397 X1225	Signature, College Dean: (Date)
Signature, Graduate Dean (if applicable): (Date)	Signature, Registrar (Institutional Contact): (Date)

PART III: TO BE COMPLETED BY THE FACULTY DISCIPLINE COMMITTEE REPRESENTATIVE

Approved Course Classification (Prefix, Number, Lab Code):

If not the same as recommended by institution, please explain:

SCNS Course Title (if new): ______
Decade Title (if new): ______
Century Title (if new): ______

Signature, Faculty Discipline Committee Representative Date

PART IV: SCNS STAFF USE ONLY

Signature, SCNS Staff Date Entered Correspondence Number

T:/Admin/CourseChangeForm.pmd Rev. 09/02

QMB 5302 — Advanced Managerial Statistics

UF MBA PROGRAM — *Summer B, 2004*

INSTRUCTOR: Dr. Patrick Thompson
E-mail: Pat Thompson/CBA
Phone: (352) 392-9731
Home: (352) 337-9157

HOURS: MW 11:00-NOON; at other times, eMail is the best way to reach me.

TEXTBOOK: *Statistics for Managers Using Microsoft Excel,* 4th Edition, David Levine, David Stephan, Timothy Krehbiel and Mark Berenson, Prentice-Hall 2004.

OBJECTIVES

This is a continuation of QMB 5301, which you took in Summer A. The objectives are similar.

PROCEDURES DURING LECTURE

Each week I will give you an outline of what we will cover next time, and will assign specific readings. You do not have to learn the material ahead of time, but at least a light skimming is useful. In lecture, we will discuss the high points, work examples and interpret the results. I will ask you to take part in these discussions, and you will find class runs much smoother when you do.

We will typically meet for about 1:15 of lecture, take a break, then wrap up with another 1:15 of lecture. I know that I have you at the end of a day in which you have almost five hours of class. I will try to keep the second hour as light as possible with lots of examples to work.

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During each class meeting, I will give you a set of problems to look at before the next class. You may do these individually, with your team, with a friend or with an enemy. *I* will not collect or grade these. Many of the even-numbered problems have an answer at the back of the book, starting on page 793. I will try to go over any murky points in class, particularly if you let me know you are having trouble.

I will give you three or four assignments to hand in. You may do these with your group, if you wish (if you do, turn in one paper with everybody's name on it). These collectively will be thirty percent of your grade.

Forty percent of your grade will be from the in-class (individual) midterm. This is tentatively scheduled for July 19. It will be open-book, open-notes and you will need to use your laptops.

The remaining thirty percent of your grade will come from the final exam, scheduled for August 9 or 11. We will decide later if this has a team format.

I cannot give you a specific grading scale, but I expect to give out at least 50% A's. Let me just say that I don't expect you to be a statistician coming out of this course.

COURSE SCHEDULE

DATE	TOPIC	Chapters in LSKB
June 28	Simple Linear Regression	Chapter 12, Sections 1-6
June 30	Inference and Prediction	Chapter 12, Sections 7-8
July 5	HOLIDAY	
July 7	Multiple Regression	Chapter 13, Sections 1-4
July 12	Testing Part of a Model	Chapter 13, Section 7
	Indicator Variables	Chapter 13, Section 8
July 14	Curvature	Chapter 14, Section 1
	Transformation	Chapter 14, Section 2
July 19	EXAM	
July 21	Collinearity	Chapter 14, Section 3
	Variable Selection	Chapter 14, Section 4
July 26	Index Numbers	Chapter 15, Section 8
	Time Series Analysis	Chapter 15, Sections 1-4
July 28	Autoregressive Models	Chapter 15, Section 5
	Forecast Evaluation	Chapter 15, Section 6
Aug 2	Seasonal Models	Chapter 15, Section 7
Aug 9 or 11	Final Exam	

Form UCC2
Florida Department of Education
Statewide Course Numbering System

COURSE TERMINATION OR CHANGE TRANSMITTAL FORM

(See instructions on reverse side)

PART I: TO BE COMPLETED BY THE INSTITUTION

Institution:	Institutional Code:	Instructional Unit or Department Name, Department Code and SAMAS Number:
University of Florida	001535	MARKETING, 11708000

Current SCNS Course Identification:
Discipline (SMA) 1 4 0 Prefix M A R Level 5 Course Number 6 2 4 Lab Code ____
Institution's Course Title: Introduction to Managerial Statistics

PART II: REQUESTED ACTIONS

Terminate Current Course ☐ Yes Date Termination Effective: ____________________

NEW SCNS Course Identification: (Complete all appropriate areas)
NEW Discipline (SMA) 1 1 1 Prefix Q M B Level 5 Course Number 3 0 5 Lab Code ____
NEW Institution Course Title (if applicable): Introduction to Managerial Statistics

EFFECTIVE TERM FOR CHANGES: (Mo/Yr) Summer 2005

Other Items to Change	Change From	Change To
Amount of Credit	N/A (3)	N/A
Type of Credit	N/A	N/A
Total Clock Hours (Contact Hour Base or Head Count)		
Type of Degree	N/A	N/A
Gordon Rule	N/A	N/A
General Ed Requirement	N/A (areas)	N/A (areas)
Prerequisites/Corequisites (This form does not update ISIS or registration prerequisite checking.)		

Change of Course Description (Course syllabus must be attached):

Mark any changes that apply:
Rotating Topic ☐ yes ☐ no
S/U Only ☐ yes ☐ no
Repeatable for Credit ☐ yes ☐ no

Department Contact, Telephone Number and PO Box: (Date) Pat Brawner, 846-1374, 117169 8/30/04	Signature, Department Chair: (Date)
College Contact, Telephone Number and PO Box: (Date) Sharon Haughton, 2-2397 X1225	Signature, College Dean: (Date)
Signature, Graduate Dean (if applicable): (Date)	Signature, Registrar (Institutional Contact): (Date)

PART III: TO BE COMPLETED BY THE FACULTY DISCIPLINE COMMITTEE REPRESENTATIVE

Approved Course Classification (Prefix, Number, Lab Code):

If not the same as recommended by institution, please explain:

SCNS Course Title (if new): ____________________

Decade Title (if new): ____________________

Century Title (if new): ____________________

Signature, Faculty Discipline Committee Representative ____________ Date ____________

PART IV: SCNS STAFF USE ONLY

Signature, SCNS Staff ____________ Date Entered ____________ Correspondence Number ____________

QMB5305 *Introduction to Managerial Statistics*

UF EXECUTIVE MBA PROGRAM *FALL 2003*

INSTRUCTOR: Dr. Patrick Thompson Phone: (352) 392-9731
E-mail: Pat Thompson/CBA Home: (352) 337-9157

NOTE: Due to the fact that many of you have erratic schedules, feel free to call me at home.

TEXTBOOK: *Practical Business Statistics,* 4th Edition, bundled with
Statpad: A Statistical Analysis System for Excel
Andrew F. Siegel
Irwin McGraw-Hill, 2000.

OBJECTIVES

Although a previous statistics course is not a prerequisite, time constraints dictate that we spend most of the semester on the more practical subjects that typically appear in the second half of a two-course sequence in statistics. Many of you will have already taken a "second" statistics course that reviewed probability, sampling, estimation and hypothesis testing, and will find that the first few classes cover familiar material. If not, don't worry; by midsemester you will be slinging standard errors around with the best of them.

Even if you have taken a full two-course sequence in statistics, you will find that this course is different. We will spend most of our time exploring the data, questioning our assumptions and interpreting our results. We will not spend <u>any</u> time memorizing formulae and crunching numbers.

EXAMS, HOMEWORK AND GRADING

During each class meeting, I will give you a set of problems to look at before the next class weekend. You may do these individually, with your team, with a friend or with an enemy. I will not collect or grade these. I will post my opinion of what the solutions are. Please check these solutions, and E-mail me about any murky points. I will try to "unmurk" things the first day of the class weekend.

Half of your grade will be based on quizzes that follow up on these homework problems. These quizzes, lasting approximately a half-hour each, will be the first thing we do on the second day of weekends 2, 3, and 4. All three quiz scores count. If you miss one quiz, there will be a makeup available after the January weekend.

The other half of your grade will come from a group project that you will present at the final class period. We will call this project your final exam so you will not feel bad about not having any exams.

I cannot give you a specific grading scale, but I expect to give out at least 50% A's. Let me just say that I don't expect you to be a statistician coming out of this course.

PROCEDURES DURING LECTURE

Each week I will give you an outline of what we will cover next time, and will assign specific readings. This textbook has been selected because you should be able to comprehend most of its material on your own. You do not have to learn the material ahead of time, but at least a light skimming is useful. In lecture, we will discuss the high points, work examples and interpret the results. I will ask you to take part in these discussions, and you will find class runs much smoother when you do.

We will typically meet for about 1:15 of lecture, take a 15-minute break, then wrap up with another 1:15 of lecture. I will do my best to end each day promptly.

IRON-CLAD, ETCHED-IN-STONE COURSE SCHEDULE

DATE	TOPIC	Chapters in Seigel	
Sep. 6	Software Overview		
	Exploring Data	Chapter 3	just the
	Summary Statistics	*Chapter 4*	high points
	Variability	Chapter 5	of these
Sep. 7	Probability	Chapter 6-7, part of 8	

Oct. 3	Inference from one sample	Chapter 9	
Oct. 4	Statistical Tests	Chapter 10	
	Inference from two samples	Chapter 10.6	
Oct. 5	Correlation, Regression I	Chapter 11	

Oct. 31	Correlation, Regression II	Chapter 11	
Nov. 1	Multiple Regression I	Chapter 12	
Nov. 2	Multiple Regression II	Chapter 12	

Dec. 5	Finish Multiple Regression	Chapter 12	
	Relationships over Time	Chapter 14	
Dec. 6	Forecasting Models	Chapter 14	
Dec. 7	Time Series Regression	Handout	

Jan. 9	Final Exam		

- - = additions
~~remove text~~ = deletion

2004-2005
COLLEGE OF BUSINESS ADMINISTRATION'S
SUPPLEMENT TO THE UNIVERSITY PROMOTION AND TENURE POLICY
(Revised 2/25/98; 9/6/02; 11/02; changes proposed 8/04)

The College of Business Administration provides this supplement as clarification of the college's application of the University of Florida guidelines and policies regarding promotion and tenure (see Attachment A). The supplement applies to all academic units in the college (these consist of the Fisher School of Accounting and the academic departments of the College of Business Administration). The criteria and procedures described below apply to faculty members considered for tenure and/or promotion (or offer of appointment) to the ranks at the associate professor, professor and distinguished professor and non-tenure accruing faculty being considered for promotion to the rank of senior lecturer or master lecturer.

A Broad View of the Process

For decisions on promotion to the rank of senior lecturer, the voting faculty consists of all members in the academic unit holding a rank of senior and master lecturer and ranks of associate professor and above; for master lecturer, the voting faculty consists of all members in the academic unit holding a rank of master lecturer and ranks of full professor and above; for promotion to the ranks of associate and professor, the voting faculty consists of all members in the academic unit holding a rank equal to or higher than the rank for which the candidate is being considered; for the award of the rank of distinguished professor, the voting faculty consists of all tenured faculty holding the rank of full professor or higher. For tenure decisions, the voting faculty consists of all tenured members in the academic unit. All tenure and/or promotion packets must be presented to the Dean. The college's promotion and tenure committee (hereafter referred to as the "college committee") will serve in a fact-finding role for the Dean in executing his/her duty to evaluate a candidate’s suitability for promotion and tenure. The transmittal from the academic unit to the Dean must conform to the University of Florida policies and procedures.

Specific statements of both the criteria and the promotion procedures for the College of Business Administration are provided in the succeeding pages.

Criteria

This section describes the college's application of the criteria for promotion and tenure provided within the University of Florida guidelines as stated below.

> "The University's criteria for granting promotion, tenure, or for permanent status shall be relevant to the performance of the work that the faculty member has been employed to do and his/her performance of the duties and responsibilities expected of a member of the university community. These criteria recognize three broad categories of academic service as follows:

(A) Teaching - Instruction, including regular classroom teaching and distance/executive/continuing education, direction of theses and dissertations, academic advisement, extension education programs, and all preparation for this work, including study to keep abreast of one's field.

(B) Research – Research or other creative activity including publications.

(C) Service – Public and professional."

In cases of tenure and/or promotion to the ranks of senior lecturer, master lecturer, associate, professor, and distinguished professor, evaluations must be based on, and in relation to, performance in assignment of research, teaching, and service. Every effort should be made to provide objective evaluations based on the criteria stated below.

A. Promotion to the Rank of Associate Professor

Ordinarily, the decision on promotion to associate professor and the tenure decision are made jointly.

~~It is the policy of the college that the sixth year of continuous service in a tenure earning position shall be considered the "normal" time for tenure.~~ Rule 6C1-7.019(3)5, stating the number of years required before a faculty member shall be considered and recommended for tenure or given notice of non-renewal, shall be the same used by the college for consideration as the "normal" time for tenure consideration. This policy does not preclude the option made available to administrators by the university to allow the nomination for tenure to be made prior to ~~the sixth~~ that year.

~~However, promotion to the rank of associate professor may be recommended before the candidate has served the number of years(6) normally required for a tenure decision. In these cases, a favorable promotion recommendation implies that the candidate has, to date, satisfied the performance expected for tenure and, assuming continued comparable performance, the candidate will be recommended for tenure by the time the maximum years-of-service requirement is reached.~~

During the appointment process, the appropriate voting faculty of an academic unit may wish to recommend a prospective faculty member from another institution for appointment to the rank of associate professor without tenure. ~~These individuals will not have satisfied the years-of-service requirement for tenure by the date of appointment.~~ At the request of the academic unit, the current college committee may evaluate each prospective faculty's performance to date in order to assess the potential success of the prospective faculty in attaining tenure by the time the years-of-service requirement is reached. In this evaluation, the criteria applied should be the same as those applied in considering promotion to the rank of associate professor.

The criteria for promotion to associate professor and/or tenure are as follows:

A1. Promotion to associate professor, in most cases, requires evidence of distinction in the performance of assignment in at least two (2) of the three (3) categories (research, teaching and service). (See Attachment A.)

A.2. Scholarly research productivity is necessary for promotion. The candidate must present evidence of scholarly work that has been published in refereed journals of international standing and/or books or monographs of comparable quality. No specific number of publications or pages of publication will satisfy the criterion. Instead, the quality of the research and the candidate's total research accomplishment should provide evidence of significant contribution to the literature in the relevant field or fields. The judgment about research must be based on a careful analysis of the candidate's research record.

A.3. Effective teaching performance is necessary for promotion. The teaching function includes course development, classroom instruction, the counseling of students in programs of study and research, and supervision of masters theses, doctoral dissertations, and other student research. Promotion to associate must demonstrate teaching at the graduate level.

A.4 With respect to service, the candidate is expected to be a contributing citizen of the university and to contribute to his/her profession. Service may be evidenced by participation in internal governance activities such as university, college, school and departmental functions and by professional service such as membership on editorial boards of respected journals, and participation in the activities of academic and professional organizations.

B. Promotion to the Rank of Professor

Ordinarily, the decision on promotion to the rank of professor is considered for candidates who are associate professors with tenure at the University of Florida.

However, during the appointment process, the appropriate voting faculty of an academic unit may wish to recommend a prospective faculty member from another institution for appointment to the rank of professor. No one will be recommended for appointment at the professor level who would not also qualify for tenure. The current college committee must evaluate the prospective faculty's performance to date in order to assess ~~potential success in attaining tenure~~ tenurability by the time the years-of-service requirement is reached. In this evaluation, the criteria applied should be the same as those applied in considering promotion to the rank of professor.

The appropriate voting faculty of an academic unit may wish to recommend a prospective faculty member from another institution for appointment to the rank of professor - with tenure - as provided in 6C1-7.019 of the F.A.C. and the

Collective Bargaining Agreement for the United Faculty of Florida, Article 15, section 15.8. This document addresses only the tenure consideration of the appointment issue and in no way precludes the role of the search committee, the rules of the Collective Bargaining Agreement, or the Constitution of the University.

In all cases, the criteria to be applied for promotion or appointment to the rank of professor shall be:

B.1 Promotion to full professor, in most cases, requires evidence of distinction in the performance of assignment in at least two (2) of the three (3) categories (research, teaching and service). (See Attachment A)

B.2 The candidate must have a record of distinguished scholarly publications. This record should provide evidence of continued research achievement subsequent to promotion or appointment to the rank of associate professor. No specific number of publications or pages of publications will satisfy this criterion. Instead, the quality of the research and the candidate's total research accomplishment should provide evidence of significant contribution to the literature in the relevant field or fields. The judgment about research must be based on a careful analysis of the candidate's research record.

B.3 The candidate must have maintained a record of effective teaching. The teaching function includes course development, classroom instruction, counseling students in programs of study and research, and supervision of masters theses, doctoral dissertations, and other student research. Promotion to full must demonstrate significant involvement with doctoral students and serving on doctoral dissertations.

B.4 With respect to service, the candidate is expected to continue to be a contributing citizen of the university. Service may be evidenced by participation in internal governance activities such as university, college, school and departmental committees and other functions. In addition, professional service such as membership on editorial boards of respected journals, holding office in professional societies, and participation in activities of academic and professional organizations will be recognized.

C. <u>Award of the Rank of Distinguished Professor</u>

The award of the rank of distinguished professor is considered for candidates who are professors at the University of Florida.

The criteria for the award of the rank of distinguished professor are as follows:

The rank of Distinguished Professor recognizes an exceptionally distinguished record of achievement, considerably beyond the level expected of a Full Professor. It is contemplated that only 3 - 5% of all Full Professors on the University of Florida faculty will warrant promotion to the rank of Distinguished Professor. Eminent Scholars are not eligible for promotion to this rank.

Faculty who are promoted to this rank will continue to have the duties of a faculty member, as assigned by the appropriate administrator. In particular, there is no reduction of duties associated with this rank, nor is there special funding of assistantships or other types of financial support. There is a promotional salary increase when the rank is first awarded.

Promotion to the rank of Distinguished Professor requires exceptional performance in at least two of the three areas generally used to assess faculty performance: research (evidence of continuous research improvement), teaching (evidence of involvement with doctoral education), and service. A candidate's performance in any two of these areas must have attracted a strong national or international reputation, as evidenced by his/her curriculum vitae, outside letters of recommendation, and any other materials that the Dean may deem relevant to the case at hand. Because candidates will be evaluated on the basis of differing criteria (e.g. research and service for one person vs. teaching and service for another), there is no presumption that the "relevant" materials will be identical in all cases.

D. Award of the Rank of Senior Lecturer

Faculty in these positions are expected to achieve and maintain effectiveness in their primary area of assignment.

D.1 With respect to teaching, excellence will be considered necessary for promotion. The teaching function includes course development, classroom instruction, and counseling students.

D.2 With respect to service, the candidate is expected to make significant contributions to the university and to his/her profession. Service may be evidenced by participation in internal governance activities such as university, college, school and departmental functions and participation in the activities of academic and professional organizations.

D.3 With respect to research, the candidate is expected to make significant contributions to the research literature if the candidate’s assignment involves research. Where the research assignment is largely “applied”, a candidate should make significant contributions related to such activities as generating grant money or enhancing outreach activities with supporting clients, for example

D.4 In all cases, candidates must show a continued growth in their human capital vis-à-vis their profession and ties to the department. This could be evidenced by participation in scholarly activities such as department workshops and seminars, in continuously improving or developing courses, in professional activities, etc.

E. Award of the Rank of Master Lecturer

Promotion to master lecturer requires evidence of sustained effectiveness in the performance of primary assignment.

E.1 With respect to teaching, there must be a sustained record of excellence in courses. The teaching function includes course development, classroom instruction, and counseling students.

E.2 With respect to service, the candidate must have continuing evidence of effective service. Service may be evidenced by participation in internal governance activities such as university, college, school and departmental committees and other functions. In addition, professional service such as holding office in professional societies, and participation in activities of academic and professional organizations will be recognized.

E.3 With respect to research, the candidate is expected to make significant contributions to the research literature if the candidate's assignment involves research. Where the research assignment is largely "applied", a candidate should make significant contributions related to such activities as generating grant money or enhancing outreach activities with supporting clients, for example.

E.4 In all cases, candidates must show a continued growth in their human capital vis-à-vis their profession and ties to the department. This could be evidenced by participation in scholarly activities such as department workshops and seminars, in continuously improving or developing courses, in professional activities, etc.

Procedures

This section primarily focuses upon tenure and promotion procedures and serves as clarification of the college's administration of the general instructions provided by the university's Office of Academic Affairs.

The College of Business Administration requires that candidates considered for tenure and/or promotion to the ranks of senior lecturer, master lecturer, associate professor, professor and ~~the award of promotion to~~ distinguished professor be considered at both the academic unit and the Dean levels. In the case of promotion, this would also apply for candidates in equivalent academic positions (i.e., research scholars, etc.).

F. Letters evaluating the candidate's research contribution will be invited in a manner consistent with the following guidelines:

F.1 <u>For all tenure accruing ranks</u>: At least six (6) letters will be solicited from leading research scholars outside the university who are senior scholars in the candidate's field. The college committee will select the reviewers from names submitted to them by the candidate and the academic unit. The candidate will provide a list of no fewer than four (4) prospective reviewers, along with a description of credentials (as well as special academic or professional relationships between the candidate and the prospective reviewers) from which the college committee will select no fewer than two (2) reviewers. At least four (4) other reviewers are to be suggested to the college committee by the Academic Unit Head, in consultation with the senior faculty of the academic unit, also including a description of credentials and special academic or professional relationships between candidate and prospective reviewers. In unusual circumstances, the Academic Unit Head may include a maximum of one (1) research scholar currently employed by the University of Florida but outside the College of Business Administration. Descriptions for the reviewers who respond will be included in the official packet. On reviewing the list of prospective reviewers, the college's committee may request the names of additional reviewers.

The Dean will be responsible for the solicitation of letters from reviewers. At least three (3) letters from external reviewers must be received before the voting faculty of the academic unit meet to discuss and vote on the candidate.

F.2 <u>For non-tenure accruing ranks (Senior Lecturer or Master Lecturer)</u>: At least six (6) letters will be solicited from leading academics within or business professionals within or outside the university who are in the candidate's field. The college committee will select the reviewers from names submitted to them by the candidate and the academic unit. The candidate will provide a list of no fewer than three (3) prospective reviewers, along with a description of credentials (as well as special academic or professional relationships between the candidate and the prospective reviewers) from which the college committee will select no fewer than two (2) reviewers. At least three (3) other reviewers are to be suggested to the college committee by the Academic Unit Head, in consultation with the senior faculty of the academic unit, also including a description of credentials and special academic or professional relationships between candidate and prospective reviewers. Descriptions for the reviewers who respond will be included in the official packet. On reviewing the list of prospective reviewers, the college's committee may request the names of additional reviewers.

The Dean will be responsible for the solicitation of letters from reviewers. At least three (3) letters from external reviewers must be received before the voting faculty of the academic unit meet to discuss and vote on the candidate.

F.3 Solicitation letters to prospective reviewers will follow a standard form, to be provided by the college committee, and will be modified as necessary for variations across academic units. They shall include a statement of the college criteria, an indication of whether or not the candidate has waived his/her right of access to a) the evaluation letters and b) the identity of those providing evaluations, an explanation that the University may not be able to adhere to the confidentiality of the letters should a dispute arise over the promotion and tenure process, and a request that the reviewer provide an assessment of the candidate's research performance. Also, at the option of the candidate, a brief biosketch and statement of research and/or teaching goals may be included. When appropriate, the reviewer may also be asked to comment on the candidate's teaching and service record. Finally, the reviewer will be asked to indicate the basis on which judgments are made and to indicate whether the candidate would likely be promoted or granted tenure at institutions comparable to the University of Florida. For all candidates, copies of representative publications, creative works, etc., will be included with the letter of solicitation.

F.4 If a candidate for promotion and/or tenure withdraws from the process or is denied after the solicitation of outside letters and that candidate is considered again in a subsequent year, the college committee should be apprised of the names (but not the content of the letters) of the previous external reviewers. This information will be used in making decisions about whom to contact for a subsequent review. In general, it is expected that the candidate, the Academic Unit Head and the college committee will exercise good faith and good judgment in such an instance.

F.5 All letters of recommendation received will be included in the packet.

Except under unique circumstances, the procedures described in (A.2) and (A.3) above will be applied in evaluating the tenure potential of candidates for appointment from other institutions.

G. Composition of the Candidate's Promotion (and/or Tenure) Packet

The candidate's promotion and tenure packet should follow the standard order required by the Office of Academic Affair's tenure and promotion guidelines, and present information in an objective fashion so that the substance of the file is neither diminished not enhanced by the format. It must include the following materials:

1. The Dean's letter of recommendation.
2. The academic unit head's letter of recommendation (added after the vote of the academic unit).
3. Letters from the reviewers.
4. A statement summary of teaching evaluations by the faculty member's students. ~~and peer teaching evaluations are to be provided. This should include the question on which the evaluation is based, academic unit and/or college means, in addition to the faculty member's means and a statement regarding the evaluation scale used, i.e. high, low, and medium for college and/or academic unit means.~~ This should include:
    a) The results for the overall rating of instructor scores;

b) The results for the question on the amount learned;
c) The results for the question on the amount of effort required;
d) The results for the question on the difficulty of the subject matter.

A summary of the candidate's grade distributions and peer teaching evaluations are to be provided as well.

NOTE: Any tenure cases with below average teaching must include multiple peer evaluations. The Academic Personnel Board wants to see evidence that the academic units and the candidate were following a plan of self-improvement.

5. Letters approving previous tenure service, when applicable.
6. Copies of the last five annual letters of evaluations by the academic unit head.
7. Any further information (including written statements of research and/or teaching goals, if provided by the candidate, and/or candidate responses.)

H. In order to provide information to eligible department members in a coherent manner, the Department chairman may appoint a committee to organize and review the candidate's qualifications.

Such a committee should produce a written report that is made available to the eligible department members at least two (2) business days before their first meeting. The written report will make no summary recommendation about the candidate's qualifications, though it may assess the scholarly and professional merits of the candidate's individual accomplishments. This report will become part of the candidate's packet as an attachment to the Academic Unit Head's letter.

The promotion and tenure packet, containing the materials described in item G above (except bios and letters from reviewers where the candidate has waived right of access), must be made available for review by the candidate. ~~The candidate shall then have ten (10) days to review the packet and provide a written response (if he/she so chooses).~~

After the candidate has signed the packet to indicate it is complete, the packet (including any written response by the candidate but excluding letters from reviewers) should be made available for review by the appropriate voting members of the academic unit. For a promotion candidate at the lecturer rank, a copy of the teaching portfolio and other materials relevant to assigned duties (i.e. software, service portfolio, publications, etc.); for a promotion and/or tenure candidate at a rank above lecturer, copies of publications, syllabi, final exams and teaching evaluations for the past two (2) years will be available for review as needed or requested. The academic unit head must then call a meeting of the appropriate voting faculty (no sooner than 48 hours after making the packet available to them) to discuss the record. A second meeting, at least one day (24 hours) after the first meeting concludes, of the appropriate voting faculty, will be called to administer a vote by secret ballot on the candidate. The discussions and the materials reviewed must be confidential. The faculty vote must be administered and recorded as required by all relevant rules of the University of Florida. If new materials or information, including the Academic Unit Head's letter and the Dean's letter, but excluding letters from reviewers where the candidate has waived right of access, are added to the packet after the commencement of consideration, a copy must be sent to the candidate who may~~, within five (5) days,~~ attach a brief and concise response to the materials.

The Academic Unit Head must add his/her letter on the candidate to the promotion and tenure packet, record the vote, sign the nomination and forward the packet to the Dean.

After the Department vote has been taken and the packet has been forwarded to the Dean, the college committee will meet to discuss and assess the candidate's qualifications in order to provide the Dean with additional information on which to base his/her decision. The committee will summarize its findings relative to the candidate's qualifications for promotion and tenure~~ in a written report~~ and report to the Dean. ~~This report must conclude with a clear (succinct) statement of the committee's overall findings with regard to the candidate's qualifications for tenure or promotion.~~

The Dean will meet with the college committee to discuss his/her reaction to the report. The Dean will make his/her decision. He/she will then meet with the committee to apprise the members of the decision and review the process followed for that year. The Dean will then forward all candidates' packets.

Upon notification of the President's decisions and/or recommendation on promotion and/or tenure nominations, the Dean and the chair of the college committee will report the outcome to the faculty.

ATTACHMENT A

Excerpts from the University of Florida guidelines for promotion and tenure and the Florida Academic Code (F.A.C.) :

Certain paragraphs related to promotion and tenure criteria contained within both the F.A.C. (6C1-7.019) and the University guidelines, read as follows:

These changes reflect changes in wording in FAC 6C1-7.019, therefore have to be made since this is quoted:

Criteria for Tenure and Promotion

The criteria for promotion or for granting of tenure shall be relevant to the performance of the work which the faculty member has been ~~employed~~ assigned to do and to the faculty member's duties and responsibilities as a member of the University community. These criteria recognize three (3) broad categories of academic service as follows:

1. Instruction, including regular classroom teaching, direction of theses and dissertations, academic advisement, extension activities, and all preparation for this work including study to keep abreast of one's field.
2. Research or other creative activity including scholarly, peer-reviewed publications.
3. ~~Public, professional, or University service~~. Professional and public service*

In most cases, all three types of ~~service~~ activities mentioned above will be expected, although the ratios may vary widely. Promotion and tenure, in most cases, should require distinction in at least two (2) of the three (3) categories, one of which should be ~~his/her~~ that of the faculty member's primary responsibility, although merit should certainly be regarded as more important than variety of activity. Distinction" ~~here~~, as used in this context, means appreciably better than the average college faculty member of the candidate's present rank and field~~, and recommendation of~~. Reviews of nominations for promotion and tenure shall contain evidence that such a comparative judgment has been made and that letters of recommendation from outside the University have been sought for the evaluation of research and creative or extension service activities.

----

* Earlier, in the section on annual evaluation of the F.A.C. (6C1-7.010 (2)(d) Service), the following is stated:

> "...Only those activities which are related to a person's field of expertise or to the mission of the University shall be evaluated. ..."