

**Suggested Projects**  
**MGMT 302.01**  
**Family Business**  
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# Suggested Projects

This booklet presents several suggestions for projects which you may undertake. These projects include:

	<b>Consulting Fees</b>
1. Family Business History (highly recommended) .....	\$4,000
2. Your Family Genogram (required) .....	\$3,000
3. Resume and Cover Letter Project (highly recommended) .....	\$2,000
4. Book Executive Summary Project .....	\$1,500-\$3,000
5. Case Summary Project .....	\$1,500
6. Current Event Analysis Project .....	\$500-\$1,000
7. Presentational Speech Project .....	\$2,000
8. Interviewing the Owner of a Family Business .....	\$3,000
9. Interviewing a Junior Member of a Family Business .....	\$3,000
10. Attendance at a Meeting of a Professional Organization .....	\$4,000
11. Reaction to a Guest Speaker .....	\$800
12. Student Designed Project .....	Up to \$5,000

For every project, including the highly recommended projects, you must submit a proposal as described in the booklet *The Great Game of Learning Rulebook*. For all projects except the Current Event Analysis, you must have submitted the proposal by e-mail prior to the deadline for submitting proposals and have received a signed contract prior to submitting the finished project in order to earn consulting fees. For Current Event Analyses, you may submit the proposal for the first time on paper along with the project when the project is submitted.

If you have an idea for a project that you would like to design for yourself that doesn't fit clearly into one of the other project categories, see the section in this booklet entitled "Student Designed Projects."

Each section below starts with a table summarizing the important information about that project for quick reference. However, before you undertake a project, you should read the entire section to make sure you are aware of any special requirements for that project.

## *Family Business History*

<b>Overview</b>	<p>You are to interview several (not just one) family members in a family-owned business, research company and/or family records, and write a complete history of the way the business came into being, how it has developed, and the major occurrences that have brought the business to the place where it stands today.</p>
<b>Process</b>	<p><b>Step 1:</b> Select a family-owned business that interests you.</p> <p>In order to complete this assignment you must have the cooperation of a family-owned business, either one owned by your own family, a family business in the San Diego area, or a family business in your home town. You may form a team with another student in the class whose family owns a family business.</p> <p>You will need to have a great deal of contact with this family as you work on this project, so using a business far away from here may make this kind of project more difficult to complete. “I couldn’t get in touch with them” or “They canceled my appointment” are not acceptable excuses for late submission of this type of project. Business owners and managers are busy people, so plan on delays and rescheduled meetings as a part of the process.</p> <p><b>Step 2:</b> Submit a proposal for a Family Business History. Receive approval of the proposal.</p> <p><b>Step 3:</b> Interview multiple family members in the business and perhaps employees, review records, learn about the history of the business.</p> <p><b>Step 4:</b> Write, rewrite and edit a six to seven page report on the history of the business.</p> <p><b>Step 5:</b> Submit your project on time.</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover Page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> 6 to 7 page written report in REPORT format</li> <li><input type="checkbox"/> References page</li> </ul>
<b>Fee</b>	\$4,000

## Other Helpful Suggestions

Find out who the real founder was. Frequently, the person who is hailed as the “founder” is not really the person who started the business in the first place but the one who made a success of a business another started (i.e., Ray Kroc didn’t start McDonald’s, but he made it a national icon). Who were the innovators who took the founder’s vision and brought it to life? Who were the contributors who brought in or thought up new products and services, new markets, new systems, new technologies, and other major changes that have influenced the firm’s growth?

Often in doing this type of project, you will run across significant differences of opinion from different family members and/or non-family company managers as to what the important contributions were and who played what role in bringing them about. It is not your role to try to get complete agreement on these differences or to sort them out to discover the “real story” but, rather, to report on the difference of opinion that you observe.

Understanding the disagreements among the family members and non-family managers about the history of the organization may shed light on differences of viewpoint as to what should be done today. Often, understanding the progression of the business from its inception until today makes a significant contribution to understanding the values of the family, the values that are practiced and/or espoused by the managers of the business, and why the business is as it is today.

Family business histories should also incorporate information that we have been or will be discussing during the semester. So, for example, you might describe a family council your particular family business has established, or an emergent network of communication developing in your family business.

1. Each report must include adequate referencing of sources within the text of the report so that the reader can readily determine the source for any given fact that you cite. You must follow the **REPORT** format shown in the *80/20 Guide to Business Writing*.
2. **Properly reference all sources.** Using information or conclusions that come from someone else’s work, research, book or article without referencing the source or using someone else’s exact words without using an appropriate quotation method is known as plagiarism, and it is unethical. Properly referencing all sources strengthens your report because it shows the reader all the research you did in collecting your information, where your information came from, and that you did your homework instead of just guessing or making up data. **PLAGIARISM AND FALSIFYING DATA ARE VIOLATIONS OF THE UNIVERSITY’S INTEGRITY POLICY AND ARE GROUNDS FOR AN “F” IN THIS COURSE AND POSSIBLY OTHER ADMINISTRATIVE PUNISHMENT.** Plagiarism is much easier to catch than you might think and being called before an academic integrity hearing

committee is far more unpleasant than simply writing your own papers. If you are unsure whether a specific source must be cited in order to avoid plagiarism or how to cite a specific source, come see me and ask.

3. The last section of your report should tell the reader what you learned from doing this project and how doing this project contributed to your education and your knowledge of Family Business. Summarize what you know about Family Business now that you didn't know before doing this project.

Projects are to be submitted in **REPORT** format, including a proper "References" page (called a Bibliography when it includes only written sources). You are to carefully reference what facts you got from which individuals. Seeing "who told you what" often gives significant insights into conflicts or problems in the business. Some important points to remember include:

The family business history should take between 15 and 20 hours to complete. It is often difficult to estimate how long such a project will take or how many pages of history will result. Therefore, this project pays a flat fee of \$4,000 and should result in a project approximately 6 or 7 pages in length. You should come see me to renegotiate the fee if it appears that you will use significantly more or less than 20 hours to complete the project and/or the project will result in a report that is significantly longer or shorter than 6 or 7 pages.

## ***Your Family Genogram***

<p><b>Overview</b></p>	<p><b>MANDATORY PROJECT.</b> Everyone will do a Family Genogram on their own family, whether or not your family includes a family business, in order to understand how this important tool for family business analysis is created and used..</p> <p>The Genogram, a variation on the “family tree,” is a tool for understanding the relationships between people in a family. Each branch shows the offspring of each married couple. In addition to indicating familial relationships, a Family Genogram:</p> <ol style="list-style-type: none"> <li>1. shows the main occupation or profession of each person,</li> <li>2. separates those who are active in the family business (if any) from those who are not active in the business, and</li> <li>3. shows the various positions which those individuals who work within the business hold.</li> <li>4. includes information on health problems or patterns within the family.</li> </ol>
<p><b>Process</b></p>	<p><b>Step 1:</b> Submit a proposal for a Family Genogram Project and receive an approval.</p> <p><b>Step 2:</b> Pay attention in class when we discuss the method of charting that you will use in the Family Genogram. In addition, look near the end of this booklet at the page which shows the symbols that may be used in charting your Genogram.</p> <p><b>Step 3:</b> Prepare a PowerPoint presentation of your family’s Genogram.</p> <p><b>Step 4:</b> Prepare an oral report using your Genogram describing to the class any patterns you discerned and anything you learned about your family as a result of doing the Genogram.</p> <p><b>Step 5:</b> Present your oral report in front of the class during one of the class days allocated for that purpose.</p>
<p><b>Deliverables</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover Page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> Oral Presentation with PowerPoint slides</li> </ul>
<p><b>Fee</b></p>	<p>\$3,000</p>

## **Other Helpful Suggestions**

In today's world of divorces, remarriages, and children from different parent pairs growing up together (often called "blended families"), doing a Business Family Genogram can be challenging. If your family includes a family business, the Genogram should go back not less than to include the parents, aunts and uncles of the oldest generation of people currently active in the management of the business, and farther if that far does not include the founder of the business.

You need to do your best to get all the information but, of course, you are not responsible for other people's inability to remember, so long as you have exhausted every reasonable avenue open to you to find the information. If your family does not include a business, your Genogram must cover at least three generations (including yourself).

In your oral presentation, I do not want you to name every name and relationship shown in the Genogram chart. You are to discuss any patterns you recognized in the family. Are a large percentage of your family members self employed or are most employees? Do certain occupations or professions recur throughout your family? Are there recurring health problem patterns such as heart disease, cancer, diabetes, alcoholism, or drug abuse? Are most marriages in the family stable or are there many divorces and remarriages? What did you learn about your family by doing this project?

This project should take approximately 10 hours to research, graph, and prepare your oral report. Therefore, you should bid this project at \$3,000 and come renegotiate the fee for this project if it appears that you will use significantly more than 15 hours on this project.

## *Resume and Cover Letter Project*

<b>Overview</b>	You are to write a professional resume and an eye-catching, professional cover letter to accompany your resume to be used in your job search process when you graduate.
<b>Process</b>	<p><b>Step 1:</b> Submit a proposal for a Resume and Cover Letter project and receive an approval.</p> <p><b>Step 2:</b> Go to the Career Center and get brochures on resume and cover letter writing.</p> <p><b>Step 3:</b> Read the below section entitled “Other Helpful Suggestions” to learn specifics that I require in resumes and cover letters submitted for this course.</p> <p><b>Step 4:</b> Research on-line or in the library other examples of excellent resumes and cover letters.</p> <p><b>Step 5:</b> Prepare a one-page resume.</p> <p><b>Step 6:</b> Prepare a one-page cover letter to accompany your resume.</p> <p><b>Step 7:</b> Submit your project on time.</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover Page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> One-page professional quality resume, incorporating the concepts discussed below</li> <li><input type="checkbox"/> One-page professional quality cover letter <b>written to a specific person at the company with which you want an interview</b> (no "To whom it may concern" letters); incorporating the concepts discussed below</li> <li><input type="checkbox"/> References page showing where you got information on resume and cover letter writing</li> </ul>
<b>Fee</b>	\$2,000
<b>Due Date</b>	The Resume/Cover Letter project is due at class time on the last day of class day in Week 4.

## Other Helpful Suggestions

Many of you will be seeking employment shortly after completing your program of study. It would be of benefit to you to have a current, professional resume and to know how to write a professional, eye-catching cover letter to accompany your resume before you begin the job search process.

You may choose to do a resume and cover letter for a project so long as you have not done a cover letter and resume in another class that Dr. Kunkel teaches. As with every project, in order to be paid in this course you must indicate that you learned something new or learned how to do something better than you could have done it before this course.

Therefore, simply “polishing up” your old resume does NOT qualify for this project. You must go to the Career Center and pick up brochures on how to write a really excellent resume and cover letter. You may also research at the library and/or on the internet on excellent quality resumes and cover letters. You will then indicate what you learned by creating an excellent cover letter and resume.

I have some strong opinions on how a professional resume and cover letter should look. Therefore, I will make a few suggestions here that are seldom in the books, but are powerful tips for writing really effective resumes and cover letters.

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## The Resume

First, a resume is not a chronological listing of every work experience you have ever had; **a resume is a sales brochure** and you are the product it is promoting. Therefore, under each job that you list (or school experience) don't just tell what your responsibilities and duties were; most of those will be relatively clear from the job title. Instead, tell what contributions you made, i.e., what difference you made while you filled the job.

Many students make the mistake of wasting space in their resumes by concentrating on job functions. For example, giving “Bank Teller” as a your job title, followed by “Waited on customers, balanced cash drawer, input transactions into the computer,” etc., is a waste of space. Those job functions are obvious from the job title of “teller.” Instead, tell the reader what contributions you made, what suggestions for improvements you made, or any changes you implemented.

Tell the reader how the company was better off because you were filling that position instead of someone else. Did you make any suggestions that were implemented? Did the company accomplish anything significant while you were there to which you contributed even remotely? By showing what a difference you've made to other organizations you've been with, you get them thinking about what contributions you might make to their organization. **Your resume will not be accepted if it does not include this extra pizzaz.**

Remember, a resume is not intended to get you a job – nobody was ever hired from a resume. The resume is intended to get you an interview, and anything that you can do to stoke the reader's interest and make them want to meet you is a step closer to an interview. Don't turn the reader off with inappropriate colored paper, flashy graphics, strange fonts or risky humor. Instead, stoke the reader's interest with the content of your resume.

In most industry settings, a resume is NEVER longer than one page. I've seen people with 30 years of experience present a clear, attractive, compelling resume on one page. Remember, you don't list everything – just enough to get the reader to want to interview you.

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## Structure of The Cover Letter

Once you have an excellent resume, your next task is to catch the reader's attention and make sure that they carefully read the resume with interest. That's the job of the cover letter. The basic layout of the cover letter should follow the following structure:

1. The first paragraph gets the reader's attention. Thank the reader if he/she has ever been in contact with you. Explain how you got the name of the company and what led you to apply there (i.e., "Bill Evans from your accounting department suggested I contact you about your opening in the marketing department"), what job you are applying for, and say what makes you want to work for this company.
2. The second section (which may be one or a few paragraphs) should discuss why they should want to interview you. In this section, you point out some of the most important things from your resume that you want to make sure they notice, particularly those things that you believe are most pertinent to the job for which you are applying. Describe what skills you bring to their company. This is the section where you "sell yourself." It is possible for this to be broken into more than one paragraph if you have several sentences of this information.
3. The final paragraph should thank them for looking at your resume and should specify exactly what the next step is, i.e., when **you** will call to make an appointment for an interview, etc.

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## Starting of The Cover Letter

The first sentence of a letter is very important, because it will determine whether the reader really pays attention to the rest of the letter. The first sentence of the first paragraph of the cover letter should NEVER begin with the word "I." Using "I" later in the cover letter is perfectly acceptable, even as the first word in a paragraph, but the first paragraph should say something about the company you are applying to or the person to whom you are writing, or who suggested that you apply to this company. Word the first sentence to put the other person's name first.

The very best two words with which to begin a letter are "Thank you." However, you must have something "real" to thank the person for. If the person to whom you're writing has talked with you on the phone, corresponded with you, or met you, you can thank them for their time. If you have previously met the person to whom you are writing, for example, you might start with "Thank you for meeting with me on \_\_\_\_\_ to discuss the accounting position with XYZ Company. I am very interested in pursuing employment opportunities with XYZ Company because . . ." Never begin with "Thank you for reading my resume." They haven't read it yet and this is a very weak beginning for a letter.

If you can't say a genuine thank you (you have nothing to thank them for), the second best start for a cover letter is to begin with a name of someone your recipient will recognize. Start the sentence with the name. For example, rather than starting with "At a job fair at USD I met Mary Murphy from your company and she told me you are looking for. . .", say "Mary Murphy, accounting supervisor with your company, suggested that I send you a resume. . ." or "Mary Murphy suggested that I contact you about the position in your purchasing department." Using "Mary Murphy" (a name that the reader will recognize) instantly gets the reader's attention and gets them prepared to read what you have to say. It makes them feel obligated to at least read the rest of your letter as a courtesy to Mary Murphy.

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## Ideas for Your Cover Letter

One other error that students frequently make is turning a "you statement" into an "I statement." For example, "Thank you for . . ." is a "you statement." "I would like to thank you for . . ." is an "I statement." Whenever you have a simple choice of phrasing something as a "you statement" or an "I statement," you should always choose the "you statement."

Make your writing centered on the needs of the reader, not your own needs and wants. That is one way to make sure that the reader reads your letter and has a positive impression of you and your communication. "I statements" turn people off, as they (rightly or wrongly) indicate a selfish person who is only out for himself/herself.

If you don't have enough information on XYZ Company to explain why you want to work there, you don't have enough information on the company to deserve an interview. Do some research before you write the letter. Remember, interviews are earned with careful preparation and good execution of your job search plan.

## ***Book Executive Summary Project***

<b>Overview</b>	Read a book on the special problems and opportunities of owning a family business and submit a concise “executive summary” of the book as a project.
<b>Process</b>	<p><b>Step 1:</b> Find a book on family business that you think will be valuable to you.</p> <p><b>Step 2:</b> Submit a proposal for a Book Executive Summary Project and receive an approval.</p> <p><b>Step 3:</b> Read the book.</p> <p><b>Step 4:</b> Prepare a five-page report including a four-page “executive summary” of the book and a one-page “evaluation” of the book.</p> <p><b>Step 5:</b> Submit your project on time.</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover Page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> Four-page “executive summary” of the book</li> <li><input type="checkbox"/> One-page “evaluation” of the book</li> <li><input type="checkbox"/> References page giving a correct APA bibliographic citation for the book</li> </ul>
<b>Fee</b>	<p>Books under 100 pages – \$1,500</p> <p>Books 100 to 200 pages – \$2,000</p> <p>Books 201 to 300 pages – \$2,500</p> <p>Books 301 pages or longer – \$3,000</p>

### **Other Helpful Suggestions**

You may choose to read a book on the special problems and opportunities of owning a family business and submit a concise “executive summary” of the book as a project. Note that an “executive summary” of a book is not your typical “school book report.” Read the instructions below to learn the difference.

Book executive summary projects should be **no longer than five typed pages**, four pages of executive summary giving the most important points made by the book, and one page of your evaluation of the value and contributions of the book. On the last page, under a heading “References,” include a proper APA style bibliographical reference for the book.

You must submit a proposal and receive a signed contract before fees can be earned. This will insure that your book is related to this course. Since the fee is dependent on the length of the book, make sure that your proposal indicates the number of pages in the book.

If you are proposing to re-read a book that you have already read for another course, you should charge me a lower fee since re-reading and writing the report take less time than reading a book for the first time. You are on your honor to report to me in the proposal that this is a book that you have already read but that you'd like to review it for a book project. Re-reading a book for a book project should pay about half what the original reading would have paid (\$750 to \$1,500).

A book executive summary project should be submitted in REPORT form. A book project should include an executive summary of the book (no longer than four pages) and an evaluation of the book (no longer than one page). That means that a busy executive should be able to read your four-page summary and say that they got the most important points contained in the book.

By reading your one-page evaluation, the executive should be able to decide whether the book was worth reading or whether your four page summary contains all that they need to know about the book. Tell the reader in your one-page evaluation how you are changed as a result of what you learned from the book (if at all) and what value this book has for your education, your career, and your life (if any).

The best way to figure out how to write a book executive summary is to imagine yourself in the following situation. Imagine that the CEO of your company has just called you into his office. He says that he is going to be attending a seminar this weekend on Family Business and he knows that many of his colleagues will be talking about this particular book. He wants to be able to take part in the discussion and not look like he is totally ignorant of the book but he doesn't have time to read the book. He is assigning you the task of reading the book and telling him in a concise, 4-page executive summary what is the most important information in the book, and in one page or less what you thought of the book.

You want to look good in the eyes of the CEO and you want him to look good in front of his CEO colleagues. What would you tell him about this book?

## *Case Analysis Project*

<b>Overview</b>	You may read a case, analyze the case, and prepare a case summary describing what you learned from analyzing the case. This case analysis may be presented in either written or oral form.
<b>Process</b>	<p><b>Step 1:</b> Find a Family Business case that interests you. You may use cases in the text or from other Family Business books. I have a notebook of Family Business cases in my office prepared by the UCLA Graduate School of Business from which you may borrow cases. There are also Family Business cases in several books in the library.</p> <p><b>Step 2:</b> Submit a proposal for a Case Analysis Project and receive an approval.</p> <p><b>Step 3:</b> Read and analyze the case, as described in the following section.</p> <p><b>Step 4:</b> If written: Prepare a three-page analysis. If oral: Prepare and practice presenting your analysis.</p> <p><b>Step 5:</b> If oral, arrange for a date on the class calendar to present your case analysis to the class.</p> <p><b>Step 6:</b> If written: Submit your project on time. If oral: Present your case analysis in class.</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover Page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> If Written: Three-page “case analysis”</li> <li><input type="checkbox"/> If Oral: Present your analysis of the case to the class</li> <li><input type="checkbox"/> References page giving a correct APA bibliographic citation for the case</li> </ul>
<b>Fee</b>	\$1,500

### **Other Helpful Suggestions**

You may read a case, analyze the case, and prepare a case analysis report describing what you learned from analyzing the case. This case summary may be presented in either written or oral form.

You may use any case that is included in the course text, if any, except those that are in the body of the text used as examples and are analyzed in the text itself. In addition, you may use any family business case that you find elsewhere. For example, several of the Family Business books in the library will include family business cases. In addition, Dr. Kunkel has a group of cases which you may borrow from his office, copy and return. Of course, you must submit a proposal before you can earn fees for analyzing a case.

You may select any case from the text book or from any other source that deals with a family business situation. If you select to write a case analysis on a case we will be discussing in the class, you must turn in your analysis on or before the class session in which we will discuss the case. After you have selected the case you would like to analyze, submit a proposal in e-mail memo form before completing the analysis. This will assure that you do not waste time analyzing a case that is not appropriate to this course.

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### **Analyzing a Case That Includes Questions**

If the case comes from a source that gives questions at the end of the case, you are to do the following things:

1. Give a brief synopsis of the most important facts in the case.
2. Answer the questions at the end of the case. Be concise. Do not waste words, but do a thorough job of answering the questions.
3. Present your ideas clearly and professionally, as if you were a consultant to the company hired to recommend action. A typed, well organized, concise, professional report is required.
4. **Any written case analysis of a case that we will be discussing in class may be submitted no later than the beginning of the class in which that case is to be discussed.**

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### **Analyzing a Case That Does Not Include Questions**

If your case comes from a source that does not include a set of specific questions at the end of the case, you should do the following things:

1. Identify the major issues of the case. Given the brevity of the report, if there are many issues involved in the case, identifying three (3) major issues that are involved in the case is sufficient. If the case is a focused case, as opposed to a Harvard-style case, there may be only one major issue raised by the case. Your report must contain

enough of a description of the facts that the reader can determine what you are talking about without having extensive knowledge of the case.

2. For at least one of the issues that you identified, analyze the issue. List alternative courses of action, evaluate each, and make a recommendation as to what you think should be done. Be specific, not vague and general. Make sure that your suggestions are doable by the company (i.e., if you are suggesting that Joe's Hamburgers buy out McDonald's you need to show where Joe's is going to get the capital). Answer for the reader the question of how each suggestion can be implemented.
  3. Are there any concepts or models that we have discussed in the class, or that have been presented in the text, or that you have learned in other business classes you have had that could be applied to this case? If so, describe them and their application to the case.
  4. Present your ideas clearly and professionally, as if you were a consultant to the company hired to recommend action. A typed, well organized, concise, professional report is required.
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## Written Case Analysis

A written analysis should be presented in no more than three (3) double-spaced pages of text, plus cover page and references page. Normally, the only references in a case analysis are the case and perhaps a reference to something from the text. Nonetheless, a written case analysis should be presented in **REPORT** form, with a cover page and a references page.

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## Oral Case Analysis

If you intend to present a case analysis in the form of an oral report, the analysis will be identical to that for a written case analysis. The only difference is that you will be making an oral presentation to the class as if we were the executive board of the company. Your report should be **no more than seven (7) minutes in duration**. You must schedule your presentation on the class calendar in advance, and cases that we will be discussing in class must be presented on the day of the class in which that case is to be discussed.

You must provide the class with a professional presentation, as described in the “Suggestions for Effective Oral Presentations” section of the *80/20 Guide to Business Writing*. Case analyses should be bid at \$1,500.

## *Current Event Analysis Project*

<b>Overview</b>	Find an interesting article or column in a business magazine or a newspaper about occurrences in small businesses, and prepare either a written or an oral current events analysis.
<b>Process</b>	<p><b>Step 1:</b> Find a Family Business article that interests you. (Maximum 5 Current Event Analyses in the semester).</p> <p><b>Step 2:</b> Prepare a proposal for the article. The proposal does not need to be pre-approved – submit the proposal with the analysis.</p> <p><b>Step 3:</b> Read and analyze the article, as described in the following section.</p> <p><b>Step 4:</b> If written: prepare a 2-page analysis in <b>memo form</b>. If oral: prepare and practice presenting your analysis.</p> <p><b>Step 5:</b> If oral: arrange for a date on the class calendar.</p> <p><b>Step 6:</b> If written: Submit your project on time. If oral, present your oral report.</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover page</li> <li><input type="checkbox"/> Proposal – does not need to be pre-approved</li> <li><input type="checkbox"/> Attach a copy of the article</li> <li><input type="checkbox"/> If written: No longer than two-pages in <b>memo form</b></li> <li><input type="checkbox"/> If oral: A prepared and practiced 5 minute presentation</li> <li><input type="checkbox"/> References page giving a correct APA bibliographic citation for the article.</li> </ul>
<b>Fee</b>	<p>One column newspaper article – \$500</p> <p>Intermediate length newspaper or short magazine article – \$800</p> <p>Long magazine article (five pages or more) – \$1,000</p>

### **Other Helpful Suggestions**

**You will not receive credit for a current events analysis that simply summarizes the material in the article.** You must show how the material in the article relates to one or more concepts that we have discussed in class or that we have seen in the reading materials.

The article may support or contradict our other materials. It may show an example of a company applying one of the concepts we have discussed, or it may show how theory has evolved beyond what is shown in the course materials.

When you find a family business article that is interesting to you, you may present it in the form of either a written current events analysis or an oral current events analysis. In analyzing your article, you should:

1. Briefly summarize the article.
2. Point out the concept, model, or theory that your article affirms, contradicts, or exemplifies.
3. Explain how the article affirms, contradicts, or exemplifies the other materials or discussion in the course.
4. Describe what conclusion you have drawn as to the validity and/or applicability of the theory or concept, i.e., who do you believe and why, where could you apply this concept and why, etc.? How has reading this article contributed to your education? In what ways are you better off because you came across this article?

Simply summarizing what an article says will not be accepted as a current events project. You must analyze how the article relates to specific material from the course.

If you choose, you may attach a proposal on paper in **MEMO** format to the current events analysis rather than sending it to me ahead of time by e-mail. For current events analyses proposals do not need to be pre-approved.

The current events analysis is designed to give you an opportunity to capitalize on and learn from events that are happening during the semester as you take this course. It is not intended that you would make these types of analyses the primary type of project that you undertake during the semester. Therefore, you may complete no more than five (5) current events analyses during the semester without prior authorization to complete more than five. In addition, newspaper and magazine articles that are more than one month old do not qualify as “current events” for these projects.

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## Written Current Event Analysis

If you choose to do your current events analysis in written form, use **MEMO** format and it should be **no longer than two (2) double-spaced pages plus a cover page**. Your description should be brief, concise, and to-the-point so that a busy executive can take your conclusions into account in their concept of reality. **Attach a copy of the article to your**

**write-up.** Written current events analyses should normally be bid in the range of \$500 to \$1,000 (2 ½ to 5 hours of consulting time).

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## **Oral Current Event Analysis**

If you choose to do your current events analysis in oral report form, you must arrange for a time on the class calendar for your presentation. Normally, I will make every effort to work current events analyses into the class the same day you present your proposal, if you like. Your presentation should be **no longer than five (5) minutes**. However, if it is a particularly momentous or interesting topic, the class may continue to discuss the issue beyond your presentation.

If more than one person shows up with a proposal to present the same article or issue on the same day, the person to be allowed to present will be selected by a game of chance (paper, rock, scissors). The other(s) will not be paid for the presentation they did not give.

You must provide the class with a professional presentation, as described in the "Suggestions for Effective Oral Presentations" section of the *80/20 Guide to Business Writing*. **For Oral Current Event Projects, attach a copy of the article on which you are reporting to the cover page, proposal and reference page and submit them for payment.** Again, oral current events analyses should normally be bid in the range of \$500 to \$1,000 (2½ to 5 hours of consulting time).

## ***Presentation Speech Project***

<b>Overview</b>	Acting as a family member and representative of a family business (your own family’s business, on one you research, or on a hypothetical business), you are to prepare and deliver a speech to the class. The types of speeches you may undertake are described below.
<b>Process</b>	<p><b>Step 1:</b> Choose a speech type and topic.</p> <p><b>Step 2:</b> Submit a proposal and receive an approval.</p> <p><b>Step 3:</b> Prepare and practice the speech (no more than 5 minutes).</p> <p><b>Step 4:</b> Arrange for a time to be put on the class calendar for you to deliver your speech.</p> <p><b>Step 5:</b> Give the speech.</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> Oral presentation – 5 minutes</li> <li><input type="checkbox"/> References page giving a correct APA bibliographic citation for any resources used</li> </ul>
<b>Fee</b>	\$2,000

### **Types of Presentational Speeches:**

Throughout the course of your professional life, you will be asked to give a variety of public presentations. Most people quail at the prospect of having to get up and talk in front of any group of people. Nevertheless, learning the set of skills you will need to master to give effective presentations will be an asset to you the rest of your life.

Acting as the owner of a family business, a family member in the family business, or a senior executive with a family business or as the presenting officer presenting an award to a family-owned business you are to prepare and deliver one of the following types of speeches. It can be a real situation that you read about in the newspaper or an imaginary situation you design.

1. **Award Presentation Speech:** The purpose of this speech is to bestow a gift or an award on a recipient. It could be a gift made to an individual, a group, or an organization, such as a university or charity. It could be an award such as a “Man of the Year” or “Family Business of the Year” award presentation. Your job is to explain what is happening, to recognize the accomplishments of the recipient as a rationale for the gift, and to establish your family business’s role in making this important social contribution.
2. **Acceptance Speech:** The purpose of this speech is to accept an award, honor or grant or some form of gift to your family business as recognition for the contributions made to the community by your family business.
3. **Introduction Speech:** The purpose is to introduce a speaker who will follow you. You are to build enthusiasm for the speaker and the topic, and establish a climate of welcome that will boost the speaker’s credibility.
4. **Commemorative Speech:** The purpose of this speech is to pay tribute to a person (e.g., a retiring CEO), a group of people (e.g., the Board of Directors at the annual company dinner), an institution (e.g., the 25<sup>th</sup> anniversary celebration of the family business), or an idea (e.g., recapturing the family business as a privately-owned firm from its publicly-owned status).
5. **Press Statement:** The purpose of this speech is to meet the press to announce some form of change within a very public family business. Possible events could include announcement of a major grant to fund some philanthropic project, or the announcement of succession or the hiring of a new senior executive.

You are not restricted to the types of speech presentations listed above. You could also construct presentations that you would make to your family business that would include sales presentations, technical reports (listing the relative advantages and disadvantages of purchasing a product or adopting a policy), staff reports (briefings to employees about coming changes in policy or new standards of evaluation), progress reports (briefing supervisor or CEO on current status of a continuing project), or investigative reports (report from a third-party such as a consultant or a government agency on the current status of family business practices with recommendations).

## **Other Helpful Suggestions**

These speech assignments will take some creativity on your part to develop mock situations that will provide an appropriate context for each type. You can base your presentations on real current events, historical cases, or hypothetical events. You can get your ideas for each by reading business and social calendar sections of the Sunday newspaper, go on line with various news groups, or adapt one from a family business history, case summary, or current events project you are already completing.

Your presentation should be **no more than five (5) minutes in duration**. You must schedule your presentation on the class calendar in advance. Please come prepared to explain the context of your presentation before you begin. This explanation should help to establish your credibility, not undermine it!

You must provide the class with a professional presentation, as described in Section 8 of the *80/20 Guide to Business Writing*. You will turn in a copy of the proposal, a cover page and a page of references following **REPORT** format, and an outline following the specifications in Section 8.6 of the *80/20 Guide to Business Writing*. Oral presentations should normally be bid at \$2,000 (10 hours of consulting time).

## *Interviewing the Owner of a Family Business*

<b>Overview</b>	<p>You may interview the owner of a family business. You may <b>not</b> do an interview project on the same business you used for a Family Business History, but you may do interviews with an owner and a junior member of the same family business.</p> <p>You may discuss with the owner the pros and cons of owning a family business, of having family working together in the business.</p>
<b>Process</b>	<p><b>Step 1:</b> Choose a family business and arrange to interview the owner.</p> <p><b>Step 2:</b> Submit a proposal for the interview and receive approval.</p> <p><b>Step 3:</b> Schedule the interview, show up on time with a prepared list of questions to ask the owner. Interview the owner.</p> <p><b>Step 4:</b> If written, write a professional report on the interview, not a transcript of the interview, but an analysis of what you learned.</p> <p style="text-align: center;">If oral, arrange for a time to be put on the class calendar for you to deliver your interview analysis.</p> <p><b>Step 5:</b> If oral, give the oral presentation.</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> Written report 4 to 6 pages in <b>report form</b> OR oral presentation – 5 minutes</li> <li><input type="checkbox"/> References page giving a correct APA bibliographic citation for interview and other resources used</li> </ul>
<b>Fee</b>	\$3,000

### **Some Questions You May Want to Consider Asking**

What are the unique challenges that face his/her business because of family being involved? Would it be better if the family was not involved in the business? Do the joys of family involvement in the business outweigh the problems?

Do they intend to or dream of passing management of the business down to their children or grandchildren? Are any of their children in the business? Are any interested in

joining the business? What steps (if any) are they taking to try to make the business attractive as a career alternative for their children? Have they begun any formal or informal training of the children to prepare them to come into the business and later be qualified to manage the business?

At what point do they foresee stepping down from leading the business – retiring? What do they see themselves doing after retirement from the business? What (if anything) are they doing to prepare themselves for retirement, both financially and in terms of finding a meaning to life after leaving the business? How do they envision the management succession taking place?

What planning (if any) has been done on ways to pass the ownership down to their heirs while avoiding excessive estate taxes? What kind of ownership structure do they have – a controlling owner, a sibling partnership, or a cousin consortium? What kind of ownership structure do they want the next generation of owners to have? Have they done any estate planning with a professional estate planner or estate attorney? Do the Juniors know what is in the estate plan?

How do the Seniors look at the issue of fairness? Should all their heirs get ownership in the business or just those active in managing it? If all, how do they think that will affect the Juniors who are running the business? If only the active managers, how do they intend to tackle the “fairness” issue for the rest of the children?

If they don't intend to pass the business down, how do they intend to “cash out” of the business? Sell? To whom? Go public? How and when? Sell to the employees with an ESOP? Do they know how these things might work?

In writing your report, **do not use “transcript” format, where you tell every question you asked followed by the interviewee’s answer.** Instead, you must synthesize what you heard in the interview and write a professional report, in report form, with headings, etc., conveying to me the story your interviewee told and what you learned from him/her.

As a last section of your report, be sure to tell me what you got from doing this project. What value did you derive, what lessons did you learn, and/or what realizations did you come to as a result of this interview? How has your education been improved as a result of what you learned from doing this interview?

An interview with the owner of a family business should result in a report approximately 4 to 6 pages long and will pay a fee of \$3,000.

## *Interviewing a Junior Member of a Family Business*

<b>Overview</b>	<p>You may interview a junior member of a family business (other than yours). You may <b>not</b> do an interview project on the same business you used for a Family Business History, but you may do interviews with an owner and a junior member of the same family business.</p> <p>You may discuss with the junior member the pros and cons of working in the family business, and of having family working together in the business, and of being a junior member in a family business..</p>
<b>Process</b>	<p><b>Step 1:</b> Choose a family business and arrange to interview a junior member of the family who works in the business.</p> <p><b>Step 2:</b> Submit a proposal for the interview and receive approval.</p> <p><b>Step 3:</b> Schedule the interview, show up on time with a prepared list of questions to ask the junior member. Complete the interview.</p> <p><b>Step 4:</b> If oral, arrange for a time to be put on the class calendar for you to deliver your interview analysis.</p> <p><b>Step 5:</b> If written, write a professional report on the interview, not a transcript of the interview, but an analysis of what you learned. Of oral, give the oral presentation.</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> If oral report, schedule date for your presentation</li> <li><input type="checkbox"/> Written report 4 to 6 pages in <b>report form</b> OR oral presentation – 5 minutes</li> <li><input type="checkbox"/> References page giving a correct APA bibliographic citation for interview and other resources used</li> </ul>
<b>Fee</b>	\$3,000

## Some Questions You May Want to Consider Asking

Discuss with the junior member the pros and cons of working with parents/grandparents/other relatives in a family business. What are the unique challenges that face their business because of family being involved? Would it be better if his family was not involved in the business? Do the joys of working with family outweigh the problems?

Do they intend to or dream of taking over the management of the business one day? What steps (if any) have the Seniors taken to try to make the business attractive as an alternative to them? What formal or informal training of the Juniors have the Seniors undertaken to prepare them to come into the business and later qualify them to manage the business? What is the Junior doing on their own to prepare themselves to take over?

At what point do the juniors see the seniors stepping down from leading the business – retiring? What do they see the seniors doing after retirement from the business? What (if anything) do the juniors see the seniors doing to prepare themselves for retirement, both financially and in terms of finding a meaning to life after leaving the business? How do the Juniors envision the management succession taking place?

What planning (if any) has been done on ways to pass the ownership down to the Juniors while avoiding estate taxes? How do the juniors see the ownership of the business being passed down – gift from the seniors during their lifetime, inheritance, or buy out of the seniors by the juniors? What kind of ownership structure exists in the business now – a controlling owner, a sibling partnership, or a cousin consortium? What kind of ownership structure do the juniors envision the business having when they take over? Are the juniors aware of any estate planning the seniors have done with a professional estate planner or estate attorney? Do the juniors know what the estate plan calls for?

How do the juniors look at the issue of fairness? Should all their parents' heirs get ownership in the business or just those active in managing it? If all, how do they think that will affect the juniors who are running the business? If only the active managers, how do they think the seniors can give "fair" shares of their estate to the rest of their children? Have the juniors talked about these issues with the seniors? Have the seniors shared their philosophy on "fairness" with the juniors.

If they don't see the business being passed down, how do they think the seniors intend to "cash out" of the business? Sell? To whom? Go public? How and when? Sell to the employees with an ESOP? Do they know how these things might work?

In writing your report, **do not use "transcript" format, where you tell every question you asked followed by the interviewee's answer.** Instead, you must synthesize what you heard in the interview and write a professional report, in report form, with headings, etc., conveying to me the story your interviewee told and what you learned from him/her.

As a last section of your report, be sure to tell me what you got from doing this project. What value did you derive, what lessons did you learn, and/or what realizations did you come to as a result of this interview? How has your education been improved as a result of what you learned from doing this interview?

An interview with a junior member of a family business should result in a report approximately 4 to 6 pages long and will pay a fee of \$3,000.

## *Attendance at a Meeting of a Professional Organization*

<b>Overview</b>	Attend a meeting of a professional association or trade group of an industry that interests you. Find out about the group, call someone and get an invitation to the meeting as a guest, and attend the meeting. Network with executives from companies in the industry. Listen to the presentation (if any) and discuss the industry with the people you meet. You might look above at the interview project to get ideas of things you might want to discuss with people with whom you interact at the meeting.
<b>Process</b>	<p><b>Step 1:</b> Choose an organization and arrange to attend a meeting.</p> <p><b>Step 2:</b> Submit a proposal for the project and receive approval.</p> <p><b>Step 3:</b> Attend the meeting and take notes.</p> <p><b>Step 4:</b> If oral, arrange for a time to be put on the class calendar for you to deliver your oral report.</p> <p><b>Step 5:</b> If written, write a professional report on the meeting, following the directions below. Of oral, give the oral presentation.</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> Written report 4 to 6 pages in <b>report form</b> OR oral presentation – 5 minutes</li> <li><input type="checkbox"/> References page giving a correct APA bibliographic citation for interview and other resources used</li> </ul>
<b>Fee</b>	\$4,000

### **Other Helpful Suggestions**

This project is designed to get you out into the business community to find professional membership organizations that you might be interested in joining when you begin your professional career. **A meeting of the executives of a single company is NOT a meeting of a professional organization within the intent of this project.**

There are many professional organizations in the San Diego area where business executives from different industries meet to discuss problems, issues, and challenges in their industry as well as to network. Most industries have trade associations. For example, the San Diego Telecom Council has activities and meetings at least once or twice a week for their 600 + member companies.

There are also community service organizations that provide business owners networking opportunities while they serve their community, such as the Rotary, Lions and Optimists clubs. There are self-help organizations that help executives develop skills necessary for business success, such as Toastmasters Clubs which help executives to develop their abilities in public speaking. Attending a meeting of any one of these kinds of organizations can be an excellent educational opportunity. These are also excellent places to network with people with whom you might want to interview when you graduate.

You may attend a meeting of a professional association or trade group of an industry that interests you. Find out about the group, call someone and get an invitation to the meeting as a guest, and attend the meeting. Network with executives from companies in the industry. Listen to the presentation (if any) and discuss the industry with the people you meet. You might look above at the interview project to get ideas of things you might want to discuss with people with whom you interact at the meeting.

In order to get paid for attending a professional meeting, you will be required to write a 4 page report (or give an oral report) on the meeting presentation, its most important points, and what you learned as a result of attending the session. If there is a formal presentation or speaker, do NOT simply outline the speaker's presentation. Instead, summarize the most important points you got out of the presentation.

Also discuss what conversations you had with business persons in the room and what you thought of the whole experience. Do you see any value in this kind of professional organization? Would you join such an organization if you owned or worked for a business in this industry?

As a last section of your report, be sure to tell me what you got from attending this meeting. What value did you derive, what lessons did you learn, and/or what realizations did you come to as a result of this meeting? What contacts did you make that might be of value to you in the future? How has your education been improved as a result of what you learned from doing this project?

As a part of your evaluation of the experience I want you to tell me whether you think you would consider becoming a regular member of this organization. What contribution do you think this organization or one like it might make to your career and personal development? Do not be afraid to say, "No, I wouldn't like to become a member of this organization because my visit showed me that it doesn't have enough value for me to justify the commitment of time involved," or some other negative conclusion. The very reason for

visiting an organization is to decide whether it has value for you, and sometimes the answer to that question will be “No.”

Attending a professional meeting and writing a four-page report on the experience pays a fee of \$4,000.

## *Reaction to a Guest Speaker*

<b>Overview</b>	Periodically we will have guest speakers visit our class. After a guest speaker has visited our class, you may write a two-page memo telling me your reaction to the guest speaker.
<b>Process</b>	<p><b>Step 1:</b> Briefly summarize the speaker's main points.</p> <p><b>Step 2:</b> Describe the points or lessons that you found most informative or relevant to your life and/or career goals and explain what value you found in these points.</p> <p><b>Step 3:</b> Give an overall evaluation as to how valuable of a contribution you felt this speaker's presentation was to this course and to your education. Should I invite this speaker to visit the class next semester? Why or why not?</p>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Cover page</li> <li><input type="checkbox"/> Approved Proposal</li> <li><input type="checkbox"/> Written report 2 pages in <b>memo</b> form</li> </ul>
<b>Fee</b>	\$800

In this class we may have some guest speakers. You may write a short (2 page) report briefly summarizing the guest speaker's presentation and then telling me what your reaction is. Was the talk worthwhile? How was your education enhanced by having heard this guest speaker? Should I invite this speaker back again next time this course is presented?

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## *Student Designed Project*

You are free to design projects of your own choosing. Remember that all projects must be preceded by a proposal which allows me to understand what you are doing and give guidance if I feel you are attempting something that can't be done or if I am unable to understand what you plan to do.

Student designed projects may be for fees up to \$5,000. Any project that would have a fee larger than \$5,000 must be broken into a series of smaller related projects. The topic of a student designed project may be anything that is related to the course or the course materials. Here again, I will have the opportunity to examine your proposal before you begin work on the project and will be able to warn you if I see that you are getting too far afield of the issues of family business.

The Student designed project category is designed to allow your creativity to soar. This category allows you to design any kind of project that you wish, so long as it is in any way related to the subject matter of the course. Be bold! Let your imagination take flight! This category is designed to allow you to design projects that are relevant and important to you, as well as fun and stimulating. If your projects are boring, you have only yourself to blame!

As a last section of your report, be sure to tell me what you got from doing this project. What value did you derive, what lessons did you learn, and/or what realizations did you come to as a result of this project? How has your education been improved as a result of what you learned from doing this project?

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## *Additional Projects*

Although family businesses have many characteristics that are unique and different from other businesses, they are still businesses and need good management just as much as non-family-owned businesses do. Therefore, if you would like to do some of your projects on management issues, there are a whole group of projects listed in the booklets for my other course: MGMT 308 – Small Business Management.

You can find the *Suggested Projects* booklets for MGMT 308 on my website at [www.sandiego.edu/~kunkel](http://www.sandiego.edu/~kunkel) and you may choose to do any of those projects that you think would be appropriate to your goals for this course. If you have questions about whether a particular project would be appropriate to this course, come and ask me.

## *Genogram Symbols*



## *Confidentiality Agreement Form*

I, the undersigned, am a student in Dr. Kunkel's Family Business course. I recognize that in this course, other students and I will be talking about our families, our families' businesses, our relationships with our parents, our siblings, other relatives, employees in our families' businesses, etc. In other words, we will be discussing many personal and sensitive issues. In order to do this, we need to know that the classroom is a safe place, and that things we discuss in the classroom will not be discussed with others.

I additionally understand that every true profession expects its practitioners to deal properly with confidential information. In companies, employees deal on a daily basis with information that is so confidential that it could do damage to the company if they were to divulge it, either intentionally or negligently. I realize that confidentiality is so important a concept in our society that in the case of many professional relationships (lawyer/client, physician/patient, psychologist/patient, priest-confessor/penitent, etc.) even a judge can not compel the professional to divulge information gained from confidential communications. This is an indication of the extreme importance that our society places on the ability of professionals to respect confidentiality when dealing with clients.

I hereby acknowledge that it is to our mutual benefit in this course if we all agree to hold all information confidential that is obtained as a part of taking part in this class, by completing assignments for this class, or from discussions that are a part of the preparation for this class. I hereby accept the promise of confidentiality from others in this class as consideration for my agreement to maintain confidentiality myself.

I hereby agree that if I divulge, or by my actions allow to be divulged, any piece of personal information about some other student or family that was learned in this class, no matter how unimportant that information may seem to me, I will be in violation of the confidentiality agreement. I acknowledge that the information I divulge does not have to seem important or negative to me. It simply has to have been revealed in our class (or in discussions outside the class regarding the class) and I need to have divulged it to another person or allowed it to be overheard by another person for me to be held in violation of the confidentiality agreement. I also understand that I do not have to intend to divulge information to another person to have done so. Discussing sensitive information with members of the class or my team members in a situation in which others may overhear sensitive information is sufficient to qualify as violating this confidentiality agreement. It is incumbent on me to protect all confidential information and to make sure that I do not discuss it where others may overhear.

I understand that violation of this confidentiality agreement makes me subject to receive a grade of "F" for the course, and, at the discretion of the professor, may also subject me to administrative review by a University Academic Integrity Committee, which could result in disciplinary action up to and including permanent expulsion from the university.

Print Name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

