

**OPERATIONS AND SUPPLY CHAIN MANAGEMENT PROGRAM  
OPSM 4810-002 PURCHASING AND MATERIALS MANAGEMENT – 2025 SPRING  
COURSE SYLLABUS**

**COURSE TITLE:** OPSM 4810 Purchasing & Materials Management – 2025 SPRING  
TUESDAY & THURSDAY 05:00-6:20 PM BLB 050

**INSTRUCTOR:** Jonathon T. Fite  
Email: [Jonathon.Fite@unt.edu](mailto:Jonathon.Fite@unt.edu)  
Office: BLB 379A  
Cell Phone: 817-690-5876

**OFFICE HOURS:** THURSDAYS 2:00-5:00 pm or any day, any time by appointment with 24-hour notice, unless I am in class. I tend to respond to email inquiries fairly quickly.

**COURSE MATERIALS:** 1. A Wall Street Journal subscription is required for this class. Go to <https://education.wsj.com/search-students/> to activate your subscription.

*Text.* Purchasing and Supply Management, 16th edition, P. Fraser Johnson, McGraw-Hill. ISBN: 978-1-259-95760-4

2. *CANVAS.* Course materials, assignments, and outside readings will be available within the UNT CANVAS portal. Students can access the CANVAS using the Internet at the website [unt.instructure.com](http://unt.instructure.com). The site is password protected.

3. *Outside readings:* Outside readings will be required for some class sessions.

4. *Internet Software:* You will need Internet access. Course materials and assignments will be distributed via the Internet using CANVAS or group emails. You will be responsible for accessing CANVAS to obtain all course materials. Adobe Acrobat Reader will be required to read some of these materials. Acrobat Reader is available free from the Adobe web site: [www.adobe.com](http://www.adobe.com). Many of the printed materials required for this course will be in stored in PDF. This format is common for materials published throughout the web and for full-text articles obtained on-line from the UNT library.

**COURSE  
MATERIALS  
CONTINUED:**

5. *Class Powerpoint Presentations:* Copies of the PowerPoint slides used during the in-class lectures can be downloaded from CANVAS. I will generally save these files in PDF. I would encourage you to download and print copies of the slides in advance of their coverage in class. You may find this useful to follow along while in class, and/or to review the slides on-line from home or work.

**It will be assumed that you have a working knowledge of the topics covered in the prerequisites for this class.**

The prerequisite material includes statistics, forecasting and regression. Effort will be made to not address material already covered in those courses.

**COURSE  
OVERVIEW:**

Every organization in both the public and private sector is in varying degrees dependent on materials and services supplied by other organizations. No organization is self-sufficient. Purchasing and supply management is, therefore, one of the key business processes in every organization. This course is designed to provide an introduction to the field of purchasing and supply management. It covers topics such as how supply is organized within organizations, the standard acquisition process, purchasing-related information systems, cost management tools, negotiation strategies, supplier selection, metrics, purchasing capital goods, purchasing services, outsourcing, purchasing's role in new product design, buyer-supplier relationships, purchasing strategies and how purchasing can influence strategic changes within organizations.

The main goal of the course is to provide students in business administration and other relevant disciplines an in-depth understanding of the key activities involved in buying and utilizing materials as well as their impact on an organization's performance. The secondary objective is to develop the students' skills in communication, teamwork, and critical thinking through classroom discussions and group projects.

**SCHEDULING  
DISCLAIMER**

The schedule, policies, and assignments contained in this course syllabus are subject to change in the event of extenuating circumstances, class progress, or by mutual agreement between the instructor and the students. All changes will be announced in class prior to the change with a posted change to the syllabus given to each student and placed in CANVAS.

## TYPICAL CLASS OUTLINE

1. Market Observations of the Week
2. Individual Readiness Assessment Tests
3. Group Readiness Assessment Tests
4. Previous / Submitted Case Discussion
5. In Class Case or Case Prep

Note: The majority of the content areas outlined in the syllabus above will be based on a “flipped” classroom format where students will review text, posted presentations and sample questions PRIOR to coming to class and the class period will focus on the student’s understanding of the materials presented in that discussion.

## OPSM 4810-002 PURCHASING AND MATERIALS MANAGEMENT – 2025 SPRING: TUESDAYS & THURSDAYS 05:00 – 06:20 PM BLB050

Week	Date	Chapter(s)	RATs	Topics & Activities	Assignments
1	14-Jan 16-Jan	Course Introduction 1 - Purchasing & Supply Management		> Team Formation, Basic Case Approaches > Your Take, Gemini's Take, Author's Take	Brennan Bank (Text Case 1-2)
2	21-Jan 23-Jan	2 - Supply Strategy	YES	> Suman Introduction, Gemini's Take > Your Take, Gemini's Take, Author's Take	Suman (Text Case 2-2)
3	28-Jan 30-Jan	3 - Supply Organization		> Strategy Frameworks, Denton Barbers Introduction > Denton Barbers case discussion	Denton Barbers (Canvas Case)
4	4-Feb 6-Feb	4 - Supply Process and Technology	YES	> Lambert-Auto (Text Case 3-3) introduction > Your Take, Gemini's Take, Author's Take	> Team Captain Applications Due > Lambert-Auto (Text Case 3-3)
5	11-Feb 13-Feb	5 - Make v Buy, Insourcing & Outsourcing 6 - Need Identification and Specification		> No Class - Prep Stedman Tech (Text Case 2-3) > Your Take, Gemini's Take, Author's Take	> Team Captain Interviews > Stedman Tech (Text Case 2-3)
6	18-Feb 20-Feb	7 - Quality	YES	> Caledon Concrete (Text Case 7-2) introduction > Your Take, Gemini's Take, Author's Take	> Team Draft Complete > Caledon Concrete (Text Case 7-2)
7	25-Feb 27-Feb	8 - Quantity & Inventory (+ Forecasting)	YES	> Introduce Alicia Wong Case > No Class - Prep Alicia Wong Written Case #1	Alicia Wong (Text Case 5-3) Written Case Due 3/2 11:59:00 PM
8	4-Mar 6-Mar	Submitted Case 1 Feedback 10 - Price		> Discuss Alicia Wong Case, Mid-Term Prep > Discuss Midterm, Introduce Price Forecasting Case	@ Home Mid-term Exam via Lockdown
9	11-Mar 13-Mar	No Class - Spring Break			
10	18-Mar 20-Mar	10 - Price Follow Up	YES	> No Class - Read Chapter 10 > Mid-Term Review, Price Forecasting Discussion	Price Forecasting Written Case Due 3/23 11:59:00 PM
11	25-Mar 27-Mar	11 - Cost Management & Negotiation		> Discuss Price Forecasting Case, Introduce Coral Drug > McMichael (Text Case 11-2) in class	
12	1-Apr 3-Apr	12 - Supplier Selection	YES		Coral Drugs (Text Case 10-2) Written Case Due 4/6 11:59 PM
13	8-Apr 10-Apr	13 - Supplier Evaluation and Supplier Relations	YES	> Discuss Coral Drugs Case, Introduce Stern Aero Case > Northeastern (Text Case 13-2) in class	Teams Locked
14	15-Apr 17-Apr	15 - Legal and Ethics 16 - Other Supply Responsibilities	YES	> No Class - work on case > Kokko Foods (Text Case 3-2) in class	Stern Aerospace (Text Case 13-2) Written Case Due 04/20 11:59 PM
15	22-Apr 24-Apr	17 - Supply Functional Evaluation and Trends	YES	> Discuss Stern Aero Case, Introduce Rocky Plains > No Class - work on case	
16	29-Apr 1-May			> No Class - work on case > Final Exam Prep, Final Observations	Video Case: Rocky Plains Brewing (Text Case 15-1) Due 4/30 11:59 pm
17	6-May	Final Exam	NO	Take from home via Lockdown browser 5:30-7:30 pm	

## GRADING:

The grading elements for the course are summarized below:

Graded Element	Percentage
Midterm	15%
Final	15%
Individual Readiness Assessment Tests	10%
Team Readiness Assessment Tests	10%
Team Cases	30%
Team Evaluation of Your Contribution	10%
Individual Contribution Extra Credit	TBD
Class Participation	06%
Professional Development*	04%
Total	100%

\* For details see Appendix B

Grade	Numeric Range	Grade points
A	89.5 to 100	4.0
B	79.5 to 89.5	3.0
C	69.5 to 79.5	2.0
D	59.5 to 69.5	1.0
F	Below 59.5	0.0

**Note:** There will be no extra credit in this class. Students will not be allowed to resubmit quizzes or exams.

The grading scale is guaranteed. You will receive no less than the grade listed within the appropriate interval. I reserve the right to adjust the grading scale in favor of the class if warranted. The points assigned to each grade comply with the points identified in the UNT Graduate Catalog.

Numeric grades are not rounded up to the next high letter grade. I frequently curve the grades for many of the assessments in the course. Rounding would result in an additional curve for a limited number of students near grade “breaks.”

## ASSIGNMENT FORMATS AND DUE DATES

You are expected to approach each assignment with the professionalism required in the “business” world by fulfilling completed staff work.

## QUIZ / EXAM CANVAS ISSUES

Text your professor to have the exam reset where you left off or if you have other issues.

**READINESS  
ASSESSMENT  
TESTS**

In team-based learning, the basic mechanism to ensure that students are exposed to course content is the Readiness Assurance Process. The Readiness Assurance Process has five major components as follows:

1. Reading Assignment – Complete the assigned readings and come to class prepared to take a test covering the conceptual material (not the quantitative material) you have just read.
2. Individual Tests – The Readiness Assessment Test (RAT) will be due before the beginning of class and will typically consist of short true-false or multiple-choice questions via a Canvas quiz. Individual RATs are open book tests. There will be no make-up RATs. However, you will be allowed to drop your lowest individual RAT score.
3. Team Tests – At the beginning of class, students retake the same test, but this time as a team. Team RATs are closed book tests. The discussion required to choose a team answer both serves as an excellent review of the readings and provides the opportunity for peer teaching. The team tests are completed and scored using Canvas which provide concrete and immediate feedback on both individual and team scores. At this point, the instructor usually posts team scores on the board; however, individual scores remain anonymous. Public posting of the team scores allows students to monitor their performance by making comparisons between their scores and those of their peers.
4. Appeals Process – This phase of the process gives students the opportunity to refer to their assigned reading material to appeal any questions that were missed on the team test. The students must produce compelling evidence (in writing) to convince the instructor to award credit for the answers they missed on the team test.
5. Instructor Feedback – This feedback comes after the appeals process and allows the instructor to clear up any confusion students may have about any of the concepts presented in the readings.

**REQUIRED  
OUTSIDE  
READINGS,  
VIDEOS OR  
PODCASTS:**

The outside readings, videos or podcasts provide different perspectives on the class topics. The readings are meant to provide a foundation for in-class discussion and to broaden the students' understanding of the topics. Material in these readings

may be testable. The majority of the outside readings will be made available in CANVAS.

**CLASS  
ATTENDANCE:**

Class meetings are primarily lecture, team work and group discussion. An upper-level undergraduate course should be a forum where ideas are freely exchanged. The course material will be augmented for certain lessons with handouts and videos which will be discussed in class and which are considered testable material.

I hold you responsible for all material covered during class, including changes to the syllabus, course schedule, and course materials. If you cannot attend the scheduled class time, due to a valid excused absence, be sure consult with your team members to catch up on the information you missed.

Class attendance is mandatory; and I will call on students and teams by name to answer questions, discuss assignments, and to comment on key concepts. Missing these opportunities may result in a reduction in your final grade (see class participation under Grading). Class participation and attendance cannot be made up without a valid medical excuse, an absence approved by the Dean of Students, or bona fide family emergency.

**CLASS  
PARTICIPATION:**

What do I mean by participation?

- Attending class on a regular basis - (Students will receive a 10 percent reduction in participation points for every unexcused absence)
- Raising and answering questions
- Reading the assigned material prior to class
- Sharing ideas, observations, and personal experiences
- Pointing out relevant data
- Generating potential solutions
- Relating to and synthesizing the ideas of others
- Pointing out relationships to earlier discussions
- Helping others develop their views and ideas
- Not distracting others who are trying to listen or learn

Class participation will affect the case grades and your final grade. Points will be based on preparation for class, quality of class input, organization, and conciseness. Half of the points in this area will be based on attendance and half will be based on actual participation. If you do not actively participate, you will not receive any points for this grading element. Please get

involved, share your experiences and ideas, and ask questions of the instructor and your classmates. Remember, if you don't understand, it's likely that others don't either.

Students are expected to attend class meetings regularly and to abide by the attendance policy established for the course. It is important that you communicate with the professor and the instructional team prior to being absent, so you, the professor, and the instructional team can discuss and mitigate the impact of the absence on your attainment of course learning goals. Please inform the professor and instructional team if you are unable to attend class meetings because you are ill, in mindfulness of the health and safety of everyone in our community.

Students are expected to fully prepare for the in-class discussions. Case discussion requires significant effort and should not be taken lightly. I will call on students by name to provide an overview of the case, define the problem, identify key issues and themes, suggest alternatives, discuss the analysis, critique inputs, provide recommendations, and summarize the in-class discussion. The points assigned will be based on degree of participation as well as the quality of participation. Failure to be prepared will result in 0 points.

Students are also expected to incorporate an understanding of current economic events within their case and class discussions. To prepare, students are required to incorporate readings of economic periodicals (*Wall Street Journal*, *Financial Times*, etc.) into their daily routines.

#### **GROUP VS INDIVIDUAL PARTICIPATION:**

Case work, home work or even quizzes may be completed as a group, but exams are an individual effort. For each team case, each team member will rate the contribution of every other team member and submit their evaluation before the case submission deadline. See details in Appendix C

#### **LIBRARY ASSIGNMENTS:**

Students are expected to use the library or internet sources to obtain outside readings and research industry information regarding the investing topics selected for the case assignments. In addition, students use the library resources for access to the economic periodicals. Outside readings may be downloaded from the UNT library's electronic resources.



**ACADEMIC  
INTEGRITY:****Academic Integrity Standards and Sanctions for Violation.**

The G. Brint Ryan College of Business takes academic honesty seriously. Ethics and integrity are important business values, essential to building trust and adhering to both professional and legal standards. Academic dishonesty destroys trust, damages the reputation and the value of the degree and is unacceptable.

According to UNT Policy 06.003, Student Academic Integrity, academic dishonesty occurs when students engage in behaviors including, but not limited to cheating, fabrication, facilitating academic dishonesty, forgery, plagiarism, and sabotage. A finding of academic dishonesty may result in a range of academic penalties or sanctions from admonition (a warning) to expulsion from the University.

Some of the most common examples of academic integrity violations include plagiarism or cheating, such as unauthorized assistance on examinations, homework, research papers or case analyses. Your work must be entirely your own. When working on assignments, you should not discuss your work with others unless approved by the course instructor. Group assignments should only be discussed with members assigned to your group, and all group members may be held accountable in some way for known academic integrity violations in a group assignment.

Another example of academic dishonesty relates to improper attribution. When preparing your assignments, you must cite all outside sources in the manner requested by your instructor. Copying or using material from any source prepared by or previously submitted by others, at UNT or other institutions, or downloaded from the Internet, is plagiarism. Unless directed otherwise in an assignment, large scale “cutting and pasting” from other sources, even if properly footnoted, is not appropriate. You should synthesize this material in your own words and provide a footnote.

Your instructor will specify what materials, if any, may be used on the tests and exams. Using materials other than those permitted, talking with other individuals during the exam, individuals exchanging information about an exam when one has taken the exam and the other has not, or copying or using material from another individual’s exam is academic dishonesty and will result in a meeting to discuss academic integrity violations and potentially issue sanctions mentioned above, and



may result in ineligibility for academic scholarships. The use of online assistance, such as sites commonly used for finding homework solutions, group chat, cell phones, smart watches, and similar tools during exams is not allowed for any reason unless specifically permitted. No portion of an exam may be copied or photographed without permission.

Students are expected to conduct themselves in a manner consistent with the University's status as an institution of higher education. A student is responsible for responding to a request to discuss suspected academic dishonesty when issued by an instructor or other University official. If a student fails to respond after a proper attempt at notification has been made, the University may take appropriate academic actions in the absence of the student's participation.

Cheating, plagiarism, or other inappropriate assistance on examinations will be treated with **zero tolerance** and will result in a grade of "F" for the course. The work should be solely your effort with ABSOLUTELY NO outside help or assistance. When working on exams, you must not discuss the exam with anyone (other faculty, other teams, or other students) unless specifically approved by the instructor. Students must be familiar with and adhere to the University's Academic Integrity policies.

Copying or using material from assignments previously submitted by other students (at UNT or other learning institutions) or downloaded from the Internet is plagiarism. If you quote material, you must cite your sources. **Large scale "cutting and pasting" from other sources, even if properly footnoted does not meet the criterion of submitting your own work and will result in a failing grade for the course.**

The examination instructions are very clear regarding what materials may be used on the exam. **If you "preprogram" your calculator, use any materials other than those permitted on the exam, talk with other individuals during the exam, exchange information about an exam with an individual that has not taken the exam, or copy or use material from another individual's exam, you will receive a failing grade for the course.**

According to University policy, if you become aware of any misconduct related to academic integrity, you should inform me or another proper authority such as the department chair or associate dean.

<b>FINAL GRADES:</b>	I will not post final grades beyond what is available on Canvas.
<b>GRADE APPEALS, WITHDRAWALS, &amp; INCOMPLETES</b>	Please refer to the UNT Graduate Catalog for policies governing these actions. If you have any questions, please contact me for clarification. Please note: I only use an incomplete for extraordinary circumstances. An incomplete grade will not be used simply to provide more time to complete the course requirements.
<b>EXAM AND ASSIGNMENT GRADE APPEALS</b>	If you disagree with how any assignment or examination was graded, <b>you must submit a written appeal by email or letter before the start of the next class period.</b> The email or letter must clearly state the rationale for the appeal and provide evidence to support your position. For example, you may cite text references, Powerpoint slides, or outside readings to support your position— <b>these must be clearly referenced by title and page number.</b> The rationale should be objective in nature and should not include subjective opinions. <b>Appeals that do not provide supporting rationale and specific reference(s) to course materials will be returned without consideration.</b>
<b>AMERICANS WITH DISABILITIES ACT</b>	UNT makes reasonable academic accommodation for students with disabilities. Students seeking accommodation must first register with the Office of Disability Accommodation (ODA) to verify their eligibility. If a disability is verified, the ODA will provide a student with an accommodation letter to be delivered to faculty to begin a private discussion regarding one's specific course needs. Students may request accommodations at any time, however, ODA notices of accommodation should be provided as early as possible in the semester to avoid any delay in implementation. Note that students must obtain a new letter of accommodation for every semester and must meet with each faculty member prior to implementation in each class. For additional information see the ODA website ( <a href="https://disability.unt.edu/">https://disability.unt.edu/</a> ).
<b>PROHIBITION OF DISCRIMINATION, HARASSMENT, AND RETALIATION (POLICY 16.004)</b>	The University of North Texas (UNT) prohibits discrimination and harassment because of race, color, national origin, religion, sex, sexual orientation, gender identity, gender expression, age, disability, genetic information, veteran status, or any other characteristic protected under applicable federal or state law in its application and admission processes; educational programs and activities; employment policies, procedures, and processes;

and university facilities. The University takes active measures to prevent such conduct and investigates and takes remedial action when appropriate.

## **SEXUAL ASSAULT PREVENTION**

UNT is committed to providing a safe learning environment free of all forms of sexual misconduct, including sexual harassment sexual assault, domestic violence, dating violence, and stalking. Federal laws (Title IX and the Violence Against Women Act) and UNT policies prohibit discrimination on the basis of sex, and therefore prohibit sexual misconduct. If you or someone you know is experiencing sexual harassment, relationship violence, stalking, and/or sexual assault, there are campus resources available to provide support and assistance. UNT's Survivor Advocates can assist a student who has been impacted by violence by filing protective orders, completing crime victim's compensation applications, contacting professors for absences related to an assault, working with housing to facilitate a room change where appropriate, and connecting students to other resources available both on and off campus. The Survivor Advocates can be reached at [SurvivorAdvocate@unt.edu](mailto:SurvivorAdvocate@unt.edu) or by calling the Dean of Students Office at 940-565- 2648. Additionally, alleged sexual misconduct can be non-confidentially reported to the Title IX Coordinator at [oeo@unt.edu](mailto:oeo@unt.edu) or at (940) 565 2759.

## **EMERGENCY NOTIFICATION & PROCEDURES**

UNT uses a system called Eagle Alert to quickly notify students with critical information in the event of an emergency (i.e., severe weather, campus closing, and health and public safety emergencies like chemical spills, fires, or violence). In the event of a university closure, please refer to CANVAS for contingency plans for covering course materials.

### **Emergency Evacuation Procedures**

- **Severe Weather** In the event of severe weather, all building occupants should immediately seek shelter in the designated shelter-in-place area in the building. If unable to safely move to the designated shelter-in-place area, seek shelter in a windowless interior room or hallway on the lowest floor of the building. All building occupants should take shelter in rooms 055, 077, 090, and the restrooms on the basement level. In rooms 170, 155, and the restrooms on the first floor.
- **Bomb Threat/Fire** In the event of a bomb threat or fire in the building, all building occupants should immediately evacuate the building using the nearest exit. Once outside, proceed to the designated assembly area. If unable to safely move to the designated assembly area, contact on or more members of your

department or unit to let them know you are safe and inform them of your whereabouts. Persons with mobility impairments who are unable to safely exit the building should move to a designated area of refuge and await assistance from emergency responders. All building occupants should immediately evacuate the building and proceed to the south side of Crumley Hall in the grassy area, west of parking lot 24.

**ACCEPTABLE  
STUDENT  
BEHAVIOR**

Student behavior that interferes with an instructor's ability to conduct a class or other students' opportunity to learn is unacceptable and disruptive and will not be tolerated in any instructional forum at UNT. Students engaging in unacceptable behavior will be directed to leave the classroom and the instructor may refer the student to the Dean of Students to consider whether the student's conduct violated the Code of Student Conduct. The University's expectations for student conduct apply to all instructional forums, including University and electronic classroom, labs, discussion groups, field trips, etc. The Code of Student Conduct can be found at [deanofstudents.unt.edu/conduct](http://deanofstudents.unt.edu/conduct).

**CLASS  
COMMUNICATIONS**

I will post class wide announcements on Canvas as needed. When those notices are posted, CANVAS will forward an email copy of the announcement to the email address the university has on file for you. If you wish to communicate with my, please send an email to [Jonathon.Fite@unt.edu](mailto:Jonathon.Fite@unt.edu) or text me. I will respond in a timely manner, but CANVAS messages are not auto-forwarded and may result in a delayed response. So, please use my UNT email.

**STUDENT  
EVALUATION  
ADMINISTRATION  
DATES**

Student feedback is important and an essential part of participation in this course. The student evaluation of instruction is a requirement for all organized classes at UNT. The survey will be made available during weeks 13, 14 and 15 of the long semesters to provide students with an opportunity to evaluate how this course is taught. Students will receive an email from "UNT SPOT Course Evaluations via IASystem Notification" (no-reply@iasystem.org) with the survey link. Students should look for the email in their UNT email inbox. Simply click on the link and complete the survey. Once students complete the survey they will receive a confirmation email that the survey has been submitted. For additional information, please visit the SPOT website (<http://spot.unt.edu/>) or email [spot@unt.edu](mailto:spot@unt.edu).

**COVID-19 IMPACT  
ON ATTENDANCE**

While attendance is expected as outlined above, it is important for all of us to be mindful of the health and safety of everyone in our community, especially given concerns about COVID-19. Please contact me if you are unable to attend class because you are ill, or unable to attend class due to a related issue regarding COVID-19. It is important that you communicate with me prior to being absent so I may make a decision about accommodating your request to be excused from class.

If you are experiencing any symptoms of COVID-19 (<https://www.cdc.gov/coronavirus/2019-ncov/symptoms-testing/symptoms.html>) please seek medical attention from the Student Health and Wellness Center (940-565-2333 or [askSHWC@unt.edu](mailto:askSHWC@unt.edu)) or your health care provider PRIOR to coming to campus. UNT also requires you to contact the UNT COVID Hotline at 844-366-5892 or [COVID@unt.edu](mailto:COVID@unt.edu) for guidance on actions to take due to symptoms, pending or positive test results, or potential exposure. While attendance is an important part of succeeding in this class, your own health, and those of others in the community, is more important.

**CLASS  
MATERIALS FOR  
REMOTE  
INSTRUCTION**

This class may be offered in a “remote” format – live, but taught remotely via ZOOM. Students will need access to a webcam and microphone to participate in fully remote portions of the class. You will need access to a computer with a webcam and microphone. Information on how to be successful in a remote learning environment can be found at <https://online.unt.edu/learn>.

## APPENDIX A – TEAM CASE ANALYSIS

Teams will be asked to present their analysis of the cases as part of in-class exercises/discussions, case write-ups, and through video presentations. In all of these instances, the team's role will be to present the facts of the case, identify the major issues and problems, generate and evaluate alternative solutions, recommend and justify a solution, and suggest an implementation strategy where appropriate. Everyone in the class should read and analyze each case. It is recommended that every person in each team take an active role in their team's case analysis; otherwise, each team may organize as it desires to maximize its effectiveness.

The paragraphs from (<http://www.hbs.edu/teaching/case-method-in-practice/core-principles.html>) introduce the basic concepts of the case method.

"The case method is a form of instructor-guided, discussion-based learning. It introduces complex and often ambiguous real-world scenarios into the classroom, typically through a case study with a protagonist facing an important decision. The case method represents a shift from the traditional, instructor-centered model of education to a participant-centered one in which students play a lead role in their own and each other's learning.

Case method instructors use questions, dialogue, debate, and the application of analytical tools and frameworks to engage students in a challenging, interactive learning environment. Not only does this approach raise the likelihood of greater retention—it also allows for learning that goes beyond the transfer of knowledge to include the development of analytical, decision-making, and communication skills, and the cultivation of self-awareness, judgment, and the capacity to lead. At its best, the case method enables students to develop what Harvard Business School Professor Tom Piper calls "the courage to act under uncertainty."

"The role of the case method instructor is captured by the Latin verb "*educare*"-to lead out. A good discussion leader does not seek to cover material in the classroom, but instead to guide students toward the discovery of critical insights and uncovering of broader lessons through thoughtful questioning, listening, and responding. The case method instructor must be well-prepared for both the content associated with each class session and the process for guiding the participant-centered learning experience."

"Students act as co-creators of the learning process in the case method. They are responsible for preparing the case in advance, first individually, and then often in small study groups. During the class session, students are expected to participate as contributors and as listeners to help advance their own learning and that of their classmates. Ideally, learning should continue after class as students reflect on the discussion and apply insights and lessons in the broader context of their academic, professional, and personal lives."

## **A Framework for Analyzing Supply Chain Management Cases**

### Step 1. Analyze the existing situation

- Supply chain structures
- Supply chain performance
- The business context
- No need to spend much space in the report on this issue. Assume that I'm the person within the organization that is asking for the analysis to be done. As such, I'm familiar with all of the background information. Only mention things that are directly relevant to some of the steps below

### Step 2. Identify the major issues and problems

- Make sure you have the real problem – not just symptoms (getting the problem right is half the battle.)
- Most of the cases have both an immediate, short-term problem or scenario as well as a longer-term, underlying problem that will need to be dealt with. Be sure that you are addressing both types of problems in your analysis

### Step 3. Generate and evaluate alternative solutions

- Brainstorm alternatives – include obvious and obscure
- As a team you should be able to identify at least 3 potential alternatives for each identified problem.
- Perform appropriate qualitative and quantitative analysis to understand and compare alternatives
- When necessary, make and state assumptions

### Step 4. Recommend and justify a solution

- Be sure to address how this proposed solution will fix the problem(s)
- Don't just punt by delaying a decision and recommending further analysis. Make a decision and recommend a course of action

### Step 5. Suggest an implementation strategy where appropriate

- What one thing are you going to focus on to help correct the problem within the next two weeks? 3 months? 6 months? 1 year?
- What barriers might you run into during implementation and how would you propose that these barriers be overcome?
- Don't try to do too much, too fast. Putting forward a slew of generic solutions that will be expensive and take years to fully implement isn't what I'm looking for. For example, don't just tell me that you'd like to 1) get new management 2) install a new IT system 3) hire a bunch of new employees, 4) spend millions of dollars on improvements, 5) sell the company, and 6) start a brand new company. These suggestions might help fix a lot of problems that most companies face, but I need to see something more detailed and well thought out.



## **Overall Suggestions**

- Case discussion requires significant effort and should not be taken lightly.
  - Each team will prepare and submit a concise, well-organized analysis and solution to the case. Sometimes this will be done in class, sometimes this will involve submitting a written report, and sometimes this will involve preparing a video presentation of your team's analysis.
    - For written reports, a two-page written report (standard fonts/margins) can be supported by up to four pages of supporting charts, diagrams, tables, etc...
    - Video presentations of your team's analysis should be approximately 15 minutes in length. The objectives of this interactive approach are to
      - 1) practice writing/presentation skills,
      - 2) learn to defend positions,
      - 3) learn to think on your feet, and
      - 4) apply what you have learned in your coursework.
- These skills can only be learned by doing.
- Failure to be prepared will result in 0 points for that particular case.
  - Don't be too superficial. Don't just take what the case says are the problems and/or solutions at face value. Think outside the box and apply the concepts that are presented in the textbook. The cases are designed to be short-read, long-think cases. Dig deep. Also, most of the cases have implications for the material from multiple chapters, not just the one that I've assigned them to. So, be sure to not limit your discussion of the problems and/or potential solutions to the material from a select few chapters. Having said that, there is no reason to read all of the chapters ahead of each case, but know that I expect your team's ability to recognize problems and generate potential solutions to those problems to increase over the course of the class as you add more information (textbook material) to your repertoire.
  - I'm more concerned about the process that you follow and your ability to justify your recommendations than I am about the solution that you arrive at. Remember, there is often more than one correct solution. Be sure to consider the ways that things are connected. Think about the ripple effects of your proposed solution.
  - There is a relativistic aspect to the way that I grade these case analyses. I do compare the written reports submitted by the various teams to each other. That is not to say that all of the teams cannot get all of the points possible for each case, it is just that if there are things that are missing or not explained as well in one team's report, it will receive fewer points than other teams. Think of me as being the person in the case who has tasked a number of teams within the organization with trying to solve the problem. As such, I need to decide from the reports submitted which team's recommendations I will implement. So, the better the recommendation and the better the recommendation is justified and the more thorough list of alternatives that were analyzed and the better that the true underlying problem was identified, the more points will be awarded.
  - Feel free to use bullet points in the 2-page written report, but be sure that you provide enough detail in the bullet points to make sure that I know what you are talking about. As for the 4 pages of supporting charts some of the charts that might

be useful are root-cause analysis charts (step 2), tables listing alternatives and their pros/advantages and cons/disadvantages, financial calculations, implementation timelines, etc.

- Be sure to proofread any documents prior to submitting.
- Don't just divide up the cases among team members and do them individually to save time and effort. It is very apparent to me which case analyses are truly team efforts and which ones are individual efforts and the scores will reflect the difference. Many heads are better than one. Each of you bring experiences to the class that can benefit your team. Different viewpoints are very valuable in determining problems, identifying possible solutions, and identifying and overcoming implementation barriers. That is one of the main reasons that cross-functional teams are a common approach to supply chain management.

### **Case Analysis Grading Criteria**

1. (15 points) Identification of Main Issues and Problems (Be sure to differentiate between symptoms of problems and the actual problems and to address both a short-term and long-term problem.)
2. (30 points) Generation and Evaluation of Alternative Solutions (You may want to separately address the pros and cons of each of your suggested alternatives.)
3. (20 points) Recommended Solution and Justification (Be sure to explain how your recommended course of action will help address the problems or issues you identified.)
4. (20 points) Implementation Timeline or Issues (What would you recommend be done now, within 2 weeks, within 1 month, 3 months, 6 months, 1 year? What types of barriers or risks might the company face during the implementation of your recommendations? How might they best address those risks? What resources will be required in order to implement your proposed solution?)
5. (15 points) Writing/Proofreading (Grammar, punctuation, spelling, sentence structure, organization, neatness, formatting, etc.) and/or Presentation Skills (maintaining eye contact and avoiding reading verbatim, speaking loud enough and in a clear and concise manner, appearing well practiced and rehearsed, using good enunciation, no mumbling, avoiding stumbling and blank spots, exhibiting professionalism in manner and dress).

## APPENDIX B – PROFESSIONAL DEVELOPMENT IN OPERATIONS, LOGISTICS & SUPPLY CHAIN MANAGEMENT

### Professionalism (2.0 points per event, 2 Events Required):

The UNT Professional Program in Logistics is very proud of its close relationship with industry and our emphasis on professionalism. This semester the Supply Chain Executive Lecture Series has planned a number of Friday afternoon sessions allowing students to meet and actively interchange with operations and logistics executives. You may earn up 2 points per speaker attended up to 4 points.

To receive each 2 point credit you must

- A) RSVP in advance at the Logistics Center with this course number,
- B) Attend, with your attendance recorded

Attendance at the same event to fulfill a requirement for another course or program will not be counted. You will not receive credit if you have not RSVP'd. **If you RSVP and fail to attend 1 point WILL be deducted from your grade.** You can make up these points by attending another presentation. No more than 4 points may be earned for this element of the course.

If you cannot attend these events due to work or class schedule conflicts, you may find an alternative such as an evening professional meeting. My goal is that you are able to interact with a corporate executive. Attendance of a career fair does NOT count – you should do this anyway. Attendance of a student interest group (such as AMA, LOGSA, or SAA) can count as a substitute if a senior executive is speaking and the presentation has been by Mr. Fite at least 24 hours prior to attending the event. You will be asked to provide the executive's business card as proof that you interacted with the executive and your attendance must be verified by the President or Faculty Advisor of the student group.

Additionally, if none of the options above work for your schedule, you can also interview an executive in your field for career advice, lessons learned, and feedback on how to grow. You would need to send me a summary of the interview via email, copying the executive you spoke to and include a link to their LinkedIn profile in addition to their email address in the cc line of the email.

### **Notes about the program:**

The Department of Supply Chain Management (SCM) provides Professional Development events (e.g., lectures, training, onboarding, and tours) through the Department and in cooperation with Professional Student Organizations (i.e., ISM, LOGSA, ASCM, AAAE). These opportunities allow students to connect with business experts and executives to acquire valuable insights beyond the classroom.

### Supply Chain Management Executive Lectures

The SCM Executive Lecture Series will be on Wednesday's from 5:00-5:50. We are in a 103-person room (BLB 055) with 67 students already signed up for the class. That leaves 36 open seats each week. We are now going to look at a larger room to accommodate the weekly sign-ups. Therefore, location will be announced with each week.

#### Registration for Events

For all events, registration is required. Registration closes at 5:00 pm the day before the event. Announcements, Event Details, and Registrations will be distributed one week before the event. Registration will be done through a Qualtrics link sent to all faculty and students one week before the event. Post-event attendance reports will be sent to the professors. Reports will include a list of registered participants, including each attendee's arrival and departure times. All registered attendees must arrive 10 minutes before the event's start time.

By selecting the course number on the registration form, students will choose which class to receive Professional Development attendance credit. Students can change the course number for a registered event by contacting [Ruben.Garcia@unt.edu](mailto:Ruben.Garcia@unt.edu). Students also can cancel their registration by contacting the same email. Immediately after registering, students will receive a registration confirmation.

If a student has registered for an event and cannot attend, they should cancel their registration no later than 24 hours before the event's start time. The registration system will allow students to register for an event until capacity restrictions are met or registration closes, whichever comes first.

Students must abide by all the following policies to receive attendance credit for speaker events and group tours. Participation in any event will only count toward one class the student selects during registration. Students receive attendance credit for registering, arriving on time, and staying for the event. Failure to register, validated from the attendance report generated after the event, will prevent students from receiving attendance credit. Failure to participate for at least 75% of the duration of the event will prevent students from receiving attendance credit. Failure to attend an event after prior confirmed registration will lead to a loss of points from the student's final accumulated credit unless the student cancels the registration at least 24 hours before the event's start time. Such loss of points may not be recovered by participating in other Professional Development events.

All attendance credits are given at the discretion of the professor.

For all questions regarding the Professional Development opportunities not answered by content found in the class syllabus or if you would like to request accommodations for any SCM event, please send an email to [Ruben.Garcia@unt.edu](mailto:Ruben.Garcia@unt.edu)

**Professional Development Event Schedule**  
**(all events are subject to change; check email for weekly announcements)**

Date	Speaker	Title	Company
Jan 22nd	Brian Sauser	Chair, Department of Supply Chain Management	University of North Texas
Jan 29th	Jeff Trykoswki	SVP - Supply Chain Services and Transformation	Ruiz Foods
Feb 5th	Ricky Stover	Chief Commercial Officer	American Commercial Barge Line
Feb 12th			
Feb 19th	Gregory Lunceford	Operations Manager	Group O
Feb 26th	Lynn Gravley	President	NT Logistics
March 5th	Joey Greger	Vice President of Operations	Andrews Distributing
March 19th	Hunter Gravely	Vice President of Business Operations	Thrustflight
March 26th	Jason Hedepohl	Vice President of Advanced Intralogistics	Shoppa's Material Handling
April 2nd	Igor Rikalo	President & Chief Operating Officer	09 Solutions
April 9th	Garret Mayberry	Talent Acquisition	JSX
April 16th	Robert Condit	Industry Executive	MFG & Energy
April 23rd	James Scott Jr	Logistics and Distribution Manager	Martin Marietta
April 30th	Wally Devereaux	Vice President	Southwest Airlines

## APPENDIX C - PEER REVIEW FORMS

Along with each case, each group member will provide the instructor with an evaluation of their individual performance and of each group member's performance for the five case assignments using the forms included in this attachment. This measure allows you to identify the level to which your group members have helped the group. This is your chance to identify and reward/penalize both excellent and poor performance of group members, as well as your own. This is the only grade measurement where you play a role in determining your own grade or of your peers.

Peer evaluations will be performed anonymously using the rating forms attached to this syllabus. You can obtain an electronic version of the forms by downloading the syllabus from Canvas. Please submit your evaluations as an attachment to an email to me. I will collect the responses and provide anonymous feedback to each student. My feedback will reflect my observations of your performance and participation in the course. You should consider my feedback as an indicator of the participation points that you will receive for the course. **I strongly recommend you review the peer evaluation sheets so you can become familiar with the requirements for team and course participation.**

I will incorporate the peer evaluations as part of your grade for the case assignments. The following formula will be used to adjust your grade for the four case grades:

$$\frac{\text{Individual average}}{\text{Team average}} \times \text{Team grade} = \text{Individual grade}$$

The formula allows an individual to receive a grade higher than the team grade if the team members considered the individual's performance to be higher than the other team members. NOTE: assigning high grades to everyone will not help the individuals that performed a disproportionate share of the work. High across-the-board evaluations do not help other team members or provide feedback on how or where to improve team performance.

You will only receive an average score and written feedback. You will not receive frequencies or distributions of scores.

## PERFORMANCE RATING FORM SUMMARY

YOUR NAME \_\_\_\_\_ DATE \_\_\_\_\_

### INSTRUCTIONS:

Use the Performance Factors handout to rate each of your team members and yourself. Follow guidelines given in the handout. Create a second page if you want to add comments. If you have any questions, contact me. Enter a 1-5 for each dimension for yourself and each person on your team. Make sure you put your teammate's name in Column Heading.

### **TEAMMATES (ENTER NAME IN COLUMN HEADING)**

FACTOR	SELF					
1. Quality of work						
2. Timeliness of work						
3. Task support						
4. Interaction						
5. Attendance						
6. Responsibility						
7. Involvement						
8. Shares resources						
9. Emotional/ motivational support						
10. Leadership						
11. Overall Performance						



## TEAM PERFORMANCE FACTORS

### Guidelines:

1. Disregard your general impressions and concentrate on one factor at a time.
2. Study carefully the definition given for each factor and the specifications for each category.
3. Call to mind instances that are typical of the student's work and behavior. Do not be influenced by unusual cases, which are not typical.
4. Determine the category that best describes the student's accomplishments in that area and enter the number on the summary sheet
5. Comments should be used to support your ratings where applicable.

### Factors:

- 1. Quality of Work: Consider the degree to which the student team member provides work that is accurate and complete.**

I	II	III	IV	V
Produces unacceptable work, fails to meet minimum group or project requirements.	Occasionally produces work that meets minimum group or project requirements.	Meets minimum group or project requirements.	Regularly produces work that meets minimum requirements and sometimes exceeds project or group requirements.	Produces work that consistently exceeds established group or project requirements.
50	75	90	95	100

- 2. Timeliness of Work: Consider the student team member's timeliness of work.**

I	II	III	IV	V
Fails to meet deadlines set by group.	Occasionally misses deadlines set by group.	Regularly meets deadlines set by group.	Consistently meets deadlines set by group and occasionally completes work ahead of schedule.	Consistently completes work ahead of schedule.
50	75	90	95	100

3. **Task Support:** Consider the amount of task support the student team member gives to other team members.

I	II	III	IV	V
Gives no task support to other members.	Sometimes gives task support to other members.	Occasionally provides task support to other group members.	Consistently provides task support to other group members.	Consistently gives more task support than expected.
55	65	75	90	95

4. **Interaction:** Consider how the student team member relates and communicates to other team members.

I	II	III	IV	V
Behavior is detrimental to group.	Behavior is inconsistent and occasionally distracts group meetings. Does not always follow code of conduct.	Regularly projects appropriate team behavior which includes following code of conduct, listening to others, and allowing his/her ideas to be criticized.	Consistently demonstrates appropriate team behavior.	Consistently demonstrates exemplary team behavior.
50	70	90	95	100

5. **Attendance:** Consider the student team member's attendance at the group meetings. (This includes in class meetings.)

I	II	III	IV	V
Failed to attend the group meetings.	Attended 1%-32% of the group meetings.	Attended 33%-65% of the group meetings.	Attended 66%-99% of the group meetings.	Attended 100% of the group meetings.
0	50	65	85	100

6. **Responsibility:** Consider the ability of the student team member to carry out a chosen or assigned task, the degree to which the student can be relied upon to complete a task.

I	II	III	IV	V
Is unwilling to carry out assigned tasks.	Sometimes carries out assigned tasks but never volunteers to do a task.	Carries out assigned tasks but never volunteers to do a task.	Carries out assigned tasks & occasionally volunteers for other tasks.	Consistently carries out assigned tasks and always volunteers for other tasks.
0	60	90	95	100

7. **Involvement:** Consider the extent to which the student team member participates in the exchange of information (does outside research, brings outside knowledge to group).

I	II	III	IV	V
Fails to participate in group discussions and fails to share relevant material.	Sometimes participates in group discussions and rarely contributes relevant material for the project.	Takes part in group discussions and shares relevant information.	Regularly participates in group discussion and sometimes exceeds expectations.	Consistently exceeds group expectations for participation & consistently contributes relevant material to project
0	65	90	95	100

8. **Share Resources/Expenses:** Consider the extent to which student team member is willing to share time, resources, or money with the group in order to accomplish group's goal.

I	II	III	IV	V
Does not share in resources/expenses.	Shares to some extent, but does not contribute a fair share.	Shares equally at all times.	Shares equally at all times, and occasionally gives more than is expected.	Consistently gives more than is expected.
50	65	90	95	100

**9. Emotional/Motivational Support: Consider the amount of emotional/motivational support the student gives to other team members.**

I	II	III	IV	V
Gives no emotional/motivational support to other members.	Sometimes gives emotional/motivational support to other members.	Occasionally provides emotional/motivational support to other group members.	Consistently provides emotional/motivational support to other group members.	Consistently gives more emotional/motivational support than expected.
55	70	75	90	95

**10. Leadership: Consider how the team member engages in leadership activities.**

I	II	III	IV	V
Does not display leadership skills.	Displays minimal leadership skills in team.	Occasionally assumes leadership role.	Regularly displays good leadership skills.	Consistently demonstrates exemplary leadership skills.
65	75	85	95	100

**11. Overall Performance Rating: Consider the overall performance of the student team member while in the group. Do not consider extraneous knowledge that you may possess which is not relevant to group behavior, such as if you associate with the student outside of class in a friendship or working relationship.**

I	II	III	IV	V
Performance significantly fails to meet group requirements.	Performance fails to meet some group requirements.	Performance meets all group requirements.	Performance meets all group requirements consistently & sometimes exceeds requirements.	Performance consistently exceeds all group requirements.
50	70	90	95	100