

**UNIVERSITY of NORTH TEXAS
G. BRINT RYAN COLLEGE OF BUSINESS**

**MGMT 3810 – Family Business
Section 002, Spring 2020
Tuesday & Thursday, 12:30 – 1:50 pm
“Sharing the Dream”**

Instructor: Professor Michael Sexton
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E-mail: Michael.Sexton@unt.edu. Contact me directly and not through Canvas. UNT e-mail checked once daily except Sunday.
Office Hours: [Monday: 1:00 – 4:00 pm](#), [Wednesday: 12:00 pm – 2:00 pm](#), and [Thursday: 5:00 pm – 6:00 pm \(CST\)](#). Other times available by appointment.

INTRODUCTION:

Family Business (MGMT 3810) is a junior level, **Team Based**, research application-oriented course. I recommend MGMT 3820 and MGMT 3850 as foundation courses.

Family businesses are a key component of the global economy, yet many family businesses fail to transition into the second generation. Additionally, many students will be involved in either their own or another family-owned business as a professional manager, accountant, attorney, or employee. This course aims to explore the personal, interpersonal, and business concerns associated with family businesses, and fosters hands-on application of material through assignments and case-based learning. This course is intended to provide students with tools to navigate and recognize the unique aspects of family business relationships, governance and wealth management, transition to the next generation, and the integration of non-family managers and employees into the business.

COURSE OBJECTIVES:

- 1.) Know and understand the basic theory and principles of family business management;
- 2.) Understand the advantages and challenges faced by family businesses;
- 3.) Learn best practices to increase the odds of success and survival;
- 4.) Address business issues related to strategy development, governance, wealth management, family member involvement, employee management, business continuation, and compensation;
- 5.) Work effectively with peers to develop and recommend specific, effective solutions to family business problems;

REQUIRED ACCESS to TEXTBOOK, SOFTWARE, and HARDWARE:

Poza, E.J. and Daugherty, M.S. (2018). Family Business (5th. Ed.). Mason, OH: South-Western Cengage Learning, Inc. (Additional readings, cases, and exercises will be distributed in class).

Microsoft Office Suite® and Adobe PDF Reader are the official software packages for this class. You are enrolled in a College of Business class therefore, you may obtain a free-of-charge copy at <https://cob.unt.edu/students/microsoft-campus-licensing-agreement>. Do not send me assignments in Pages®, Word Perfect®, or linked to Google Docs®.

You will also need access to a Windows or Apple compatible PC/ Tablet/ Smartphone connected to an electrical source and the Internet. In addition, a screen, keyboard, mouse, speakers, printer, and video codec software (i.e. VLC, Adobe, Windows Media Player, Mac Pro

Video or similar) are required for this course. All UNT computer labs have these items.

GROUND RULES:

Integrity is a large part of this course and the relationships we nurture. The class will engage in discovery, problem recognition, and the creation of marketable solutions. All students enrolled in this class are bound by a Non-Disclosure agreement for a period of two years. We will not steal ideas from one another, but will build off of others to stimulate the imagination.

METHOD OF INSTRUCTION:

Modules in the course will be conducted using the textbook, research, videos, guest speakers, exercises, articles and cases. Discussions will be used to elaborate on and extend the content of the readings, developing conceptual ideas and applying them to business situations. Articles and cases will deal with issues related to family business problems. Recognize that each article/case is simply a record of an issue, which has been faced by business executives. It is not to be construed as portraying either correct or incorrect behaviors. Instead, these articles/cases contain the facts, opinions and prejudices upon which executive decisions have been made. As such, they will provide the basis for in-depth examination of particular issues and concepts.

For this method of instruction to work effectively, **you must have read and thought about all assigned material prior to attending class**. A good rule of thumb is to spend as twice as much time analysing and preparing the material as you do reading it.

PERFORMANCE EVALUATION AND GRADING:

Your grade in this course will be determined by your performance on individual assignments, three exams, an integrative team project, two presentations, and the level and quality of your participation. Your grade will be calculated by adding the points earned (not percentage). The point distribution will be as follows:

Article Reviews (2@10)	20
Case Analyses (4@20)	80
Integrative Team Project	100
Final Project Presentation	30
Exams: 3 @ 100 each	<u>300</u>
Maximum Points Possible	530

<u>Final</u>	<u>Grade</u>
477 to 530	A
424 to 476.9	B
371 to 423.9	C
318 to 370.9	D
317.9 and below	F

MEETING AND CLASS PARTICIPATION:

Various discussion techniques will be used in class. For these techniques to be effective, you must do the following:

ATTEND every team meeting (class), arriving on time so that it can start promptly. If you must be absent and have a reasonable excuse, please let the team know in advance. **Missing three meetings could result in a reduction of one letter grade. Missing four team meetings could result in automatic failure.** Plan ahead.

KEEP in mind that the amount of knowledge you gain from this course depends directly on your level of preparation and participation: you cannot participate if you do not attend meetings (class), and you cannot participate effectively if you have not prepared. Furthermore, the skills you develop through participation are as valuable as the techniques you learn in the course.

INDIVIDUAL ASSIGNMENTS:

Article Reviews

During the semester, you will be required to complete two (2) article reviews. As part of that assignment, you will be required to make a presentation and submit a written report detailing its analysis, findings and recommendations. Specific assignment due dates and topics will be discussed in class.

Look for a current article (newspaper, current news magazine, or legitimate Internet website no older than 6 months from the due date) that relates to any aspect of family business. Please, no articles with political orientation. Additionally, if you are reviewing a very short article (one that is so short, your review will be longer than the article), you will need to find additional articles on the same topic to receive full credit. Late submissions will not be accepted.

Here are the specifics:

- 12-point Arial font, ¼ inch indentions, and one inch margins on all sides.
- You will write a one page review on each article.
- One-half page (single-spaced, keyboarded) summary of the article.
- One-half page (single-spaced, keyboarded) of your critique and opinion about the topic being discussed in the article.
- If your review is not one full page, 5 points will be deducted from your total score.
- No coversheet or Letter of Transmittal is required.
- See the example below.

Article review of: Name of Article

Author of Article:

Source of Article: Full APA Citation

By your name: Good Student

I recently learned that proper citations (MLA, APA, Turabian, or Chicago) are no-longer taught in high school or at UNT in writing classes. Let's agree to use APA on article reviews from page 200 of the APA Publication Manual, 6th Ed. I have examples of what you will run into below.

ONLINE MAGAZINE ARTICLE

Source of Article: Johansson, A. (2019, August). Why Employees are an Entrepreneur's Best Investment. *Entrepreneur*. Retrieved from <https://www.entrepreneur.com/article/333920>.

ONLINE NEWSPAPER ARTICLE

Schuman, M. (2019, August 29). Blocked in Business, South Korean Women Start Their Own. *The New York Times*. Retrieved from <https://www.nytimes.com>.

Individual Case Analyses

During the semester, you will be required to complete four (4) case analyses. As part of that assignment, you will be required to make a presentation and submit a written report detailing its analysis, findings and recommendations. Specific assignment due dates will be discussed.

INTEGRATIVE TEAM PROJECT AND FIVE (5) PRESENTATIONS:

Who chooses the team members?

Teams are self selecting in my class, unless I need to step in. When you start a new firm on the street, you get to select your banker, accountant, lawyer, etc. I will make placements only when necessary. This team will remain in tact for the entire semester.

How many people can we have?

Teams function well with up to five members. I have allowed up to eight due to class size and grading considerations in a face-to-face section. Most teams lose a member along the way.

What are the parameters of the report?

Integrative Team Project

Project reports are to be submitted in hardcopy/ electronic in MS Word. The original copy of the report containing prototypes, etc. will be kept on file and will not be returned. The exact electronic file of the hardcopy must be sent to the professor. A professional report that (a) demonstrates a command and understanding of the business, the Industry, and competitors, (b) uses sound presentation logic and well thought through justifications, and (c) displays a liberal use of *appropriate* graphs, charts and tables, is expected. The written assignments must be submitted to my office (or designated area) on the day they are due. Late submissions will not be accepted. All projects will be submitted to www.turnitin.com in full compliance of university policy*.

What about the presentations?

Impromptu Presentations on chapter assignments and article reviews will prepare you for the corporate world. You must be able to state the facts, your opinion, and stand your ground. These will be short in duration.

Integrative Team Presentation will utilize a Pecha Kucha format of 20 slides (words & numbers) with no more than 20 seconds for each slide. This format is gaining popularity at the corporate level due to forcing people to get to the point. Interested people will visit with you after the presentation, which saves time. You may use Power Point slides, white boards, story boards, or flash cards. Learn more at <http://pecha-kucha.org>.

The final **Team Presentation** must be of the highest professional standards. Use of appropriate presentation mediums and captivating presentation style is essential. Your team's presentation will be graded based on the quality of (a) the content of the presentation, (b) the presentation style, and (c) the ability of the team to justify its position in the Q&A. All presentations will be made in the **Team** context. The method of submission (technology use), content, and length will be detailed later in the semester.

How are peer evaluations utilized in this class?

All of us have been on teams where someone did not contribute and expected the same grade. I will compute your grade for the project and final presentation based on the team grade and the peer evaluations that you receive. Students will not directly grade (A, B, etc.) one another but will provide me with feedback (and documentation) as to the percentage of contribution on a base of 100%. Credit for the report will not exceed 100% contribution.

Peer evaluations are due with the final report. In addition, peer evaluations will be randomly requested during the semester to monitor team processes. Teams may also initiate a peer evaluation to alert the instructor of issues. Removal from the team is possible, but rare.

Warnings (using my criteria) usually correct the situation. **It is the team's responsibility to inform underperforming members of your concerns and the possible effects on individual grades.** We are all adults, so handle this with the proper care it deserves.

Students dropped from teams will be required to complete the entire integrative case on their own and will NOT be permitted to make the final presentation (minus 30 points). Other options include dropping or failing the course.

EXAMS (1, 2, and 3):

The three Exams are "knowledge-acquisition-application" oriented. That is, they are designed to "quickly" test your knowledge of entrepreneurship concepts and theories, certain key business concepts, or analytical tools. The objective is to ensure that all students "are on board" and are "staying up-to-date" with the instructor and the rest of the class. I may move the exams to the Canvas Learning System.

SUNDOWN RULE:

You have two weeks (from the due date) to inquire about your grade on an exam, assignment, or team project. The exception to this is the final exam where inquiries may extend into the new term. The purpose is to resolve any issue during the term and not wait until the last week of the term. Check your grades weekly in the Canvas Learning System.

CANVAS LEARNING SYSTEM GRADES AND ANNOUNCEMENTS:

Grades posted in the Canvas Learning System are unofficial. The instructional team will keep official grades (in spreadsheet form) in a secure location. This is to protect against hacking of the Canvas Learning System and destruction of grade reports. Official grades and Canvas Learning System grades should be equivalent (match). Please contact me to discuss discrepancies. Check your grades and announcements weekly.

COURSE RELATED E-MAIL MESSAGES*

I will use the messages tool within the course to contact you. Canvas delivers my messages to your default EUID@unt.edu or EUID@my.unt.edu email account. It is your responsibility to check your default e-mail account three times weekly. Remember, I do not have administrative access to change your default e-mail account. Only you can make changes. Please consider the following example.

To: Michael.Sexton@unt.edu
From: Good.Student@my.unt.edu
Title: MGMT 3850 Question About the Industry.

Dear Mr. S.:

May I use Porter's Generic Model of Competition to position my project?
Best, G.S.

NON-CONFIDENTIAL EMPLOYEES:

Due to changes in Texas state law, faculty and staff are now considered **non-confidential** employees. Individuals/ students sharing that they suffer from depression, are contemplating suicide, involved in sex trafficking, or are victims of crimes (to include domestic violence) must be referred to the proper UNT office. Faculty and staff that fail in this requirement are subject to immediate termination and criminal prosecution.

PRIVACY AND THE LAW:

Please keep in mind that we must follow the guidelines set forth by the Health Information Privacy and Portability Act (HIPPA, 1996) and the Federal Education Rights and Privacy Act (FERPA, 1974). Please do not reveal private information about others in class assignments and discussions. Ex-girlfriends, toad boyfriends, and drug addict parents cannot be identified by name or association, nor can they defend themselves. This activity exposes the University to law suits and will result in no points awarded and referral to the Provost and Dean of Students.

EUID ACCESS AND PASSWORDS:

Enterprise User Identification numbers (EUID's) and passwords are required to access this course. It is the student's responsibility to maintain a current EUID number and password. Keep in mind that the University will time out passwords every 120 days for security reasons. You may reset your password at <https://ams.unt.edu/>.

USE OF PERSONAL COMPUTERS:

The student assumes ALL responsibility for the operating condition of personal computers and the functionality of individual Internet connections. The help desk is available to help solve personal computer issues and is located at <https://www.unt.edu/helpdesk/>. The help desk web page has contact and hours of operations information displayed. In addition, ISP issues will be dealt with on an individual basis and will require documentation. Please modify pop-up blocker software.

USE OF THE CANVAS LEARNING SYSTEM:

The student assumes ALL responsibility for downloading instructional material, class assignments, taking quizzes, and uploading assignments within the Canvas Learning System.

DROPPING THE COURSE:

If you decide it is necessary to drop the course, please adhere to the related guidelines presented in the *2019-2020 Schedule of Classes – the University of North Texas*. The drop form is located at https://registrar.unt.edu/sites/default/files/drop_request_fillable_1.pdf.

STUDENTS WITH DIFFERENT ABILITIES:

The College of Business Administration complies with the Americans with Disabilities Act in making reasonable accommodation for qualified students with disabilities. If you have an established disability as defined in the Americans with Disabilities Act and would like to request accommodation, *please contact the course professor as soon as possible*. Office hours, locations, phone numbers, etc., are presented above. Note: University Policy requires that students notify their instructor(s) within the first week of class that an accommodation will be needed.

OFFICE of DISABILITY ACCESS:

The course instructor works closely with and conforms to the strict guidelines of the Office of Disability Access. Printed exams will be administered by the ODA at a location agreed upon by the client, the instructor, and ODA staff. <https://disability.unt.edu/>.

STUDENT ATHLETES:

Student athletes have the difficult task of maintaining grades and high levels of physical performance. Due to these simultaneously difficult tasks, I ask student athletes to identify themselves to me via email message and provide a game/ practice schedule.

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 Center for Student Rights and Responsibilities 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 <https://deanofstudents.unt.edu/conduct>.

SCHOLASTIC DISHONESTY POLICY:

The UNT Code of Student Conduct and Discipline provides penalties for misconduct by students, including academic dishonesty.

Academic dishonesty includes cheating and plagiarism.

The term cheating includes, but is not limited to, (1) use of any unauthorized assistance in taking quizzes, tests or examinations; (2) dependence upon the aid of sources beyond those authorized by the instructor in writing papers, preparing reports, solving problems, or carrying out other assignments; or (3) the acquisition, without permission, of tests or other academic material belonging to a faculty member or staff of the university.

The term plagiarism includes, but is not limited to, the use, by paragraph or direct quotation, of the published or unpublished work of another person without full and clear acknowledgment. It also includes the unacknowledged use of materials prepared by another person or agency engaged in the selling of term papers or other academic materials*. (Source: Code of Conduct and Discipline at the University of North Texas.)

The incident will be reported to the UNT Office of the Provost and the investigation will follow the outlined "Academic Integrity Process" as referenced at <http://facultysuccess.unt.edu/academic-integrity>. If you have engaged in academic dishonesty related to this class, you will receive a failing grade on the test or assignment, and a failing grade in the course. This policy is intended to protect the honest student from unfair competition with unscrupulous individuals who might attempt to gain an advantage through cheating.

***Please Note:** I will use a plagiarism detection service (i.e. Turnitin.com) to scan your final project. This will be done in full compliance with university policy.

UNT COLLEGE of BUSINESS STUDENT ETHICS STATEMENT:**

As a student of the UNT College of Business, I will abide by all applicable policies of the University of North Texas, including the Student Standards of Academic Integrity, the Code of Student Conduct and Discipline and the Computer Use Policy. I understand that I am responsible reviewing the policies as provided by link below before participating in this course. I understand that I may be sanctioned for violations of any of these policies in accordance with procedures as defined in each policy.

I will not engage in any acts of academic dishonesty as defined in the Student Standards of Academic Integrity, including but not limited to using another's thoughts or words without proper attribution (plagiarism) or using works in violation of copyright laws. I agree that all assignments I submit to the instructor and all tests I take shall be performed solely by me, except where my instructor requires participation in a group project in which case, I will abide by the specific directives of the instructor regarding group participation.

While engaged in on-line coursework, I will respect the privacy of other students taking online courses and the integrity of the computer systems and other users' data. I will comply with the copyright protection of licensed computer software. I will not intentionally obstruct, disrupt, or interfere with the teaching and learning that occurs on the website dedicated to this course through computer "hacking" or in any other manner.

I will not use the university information technology system in any manner that violates the UNT nondiscrimination and anti-sexual harassment policies. Further, I will not use the university information technology system to engage in verbal abuse, make threats, intimidate, harass, coerce, stalk or in any other manner which threatens or endangers the health, safety or welfare of any person. Speech protected by the First Amendment of the U.S. Constitution is not a violation of this provision, though fighting words and statements that reasonably threaten or endanger the health and safety of any person are not protected speech.

** I did not write this policy which displays terrible use of passive voice and other crimes against good writing.

Student Standards of Academic Integrity

http://policy.unt.edu/sites/default/files/untpolicy/pdf/7-Student_Affairs-Academic_Integrity.pdf

Code of Student Conduct and Discipline

http://conduct.unt.edu/sites/default/files/pdf/code_of_student_conduct.pdf

Computer Use Policy

<http://policy.unt.edu/policy/3-10>

PANDEMIC, DISASTER, OR WEATHER CONDITIONS:

The word "Pandemic" refers to health related emergencies as declared by the proper authorities. The word "Disaster" refers to either natural and man-made activities, or states of emergency affecting the population, as declared by the proper authorities (to include Zombie attacks). Weather conditions are declared by UNT authorities. We will continue to operate through normal Internet connections. Course timing and due dates adjustments will be made as required. I will contact you via telephone, Ham Radio, signal fires, semaphore, Canvas LMS® or www.My.Unt email platforms. No Carrier Pigeons will be used or harmed in this process. If you miss an assignment or exam, please refer to the class attendance policy.

EMERGENCY ALERTS POLICY:

The University of North Texas has an emergency Notification System, [Eagle Alert](#), which has the capability of calling or text messaging emergency notices. As a student, you may also register with Eagle Alert to receive notification of any warnings or campus closings that are announced. Instructions for enrollment can be found at my.unt.edu. The university's radio station, [KNTU 88.1 FM](#) and website <http://www.unt.edu>, will provide updated information during an emergency situation.

COLLEGE 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 one 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.

IMPORTANT NOTICE FOR F-1 VISA HOLDERS:

For F–1 students enrolled in classes for credit or classroom hours, no more than the equivalent of one class or three credits per session, term, semester, trimester, or quarter may be counted toward the full course of study requirement if the class is taken on-line or through distance education and does not require the student's physical attendance for classes, examination or other purposes integral to completion of the class. An on-line or distance education course is a course that is offered principally through the use of television, audio, or computer transmission including open broadcast, closed circuit, cable, microwave, or satellite, audio conferencing, or computer conferencing. If the F–1 student's course of study is in a language study program, no on-line or distance education classes may be considered to count toward a student's full course of study requirement [Title 8 CFR 214.2 Paragraph (f)(6)(i)(G)].

UNIVERSITY OF NORTH TEXAS COMPLIANCE:

To comply with immigration regulations, an F-1 visa holder within the United States may need to engage in an on-campus experiential component for this course. This component (which must be approved in advance by the instructor) can include activities such as taking an on-campus exam, participating in an on-campus lecture or lab activity, or other on-campus experience integral to the completion of this course.

If such an on-campus activity is required, it is the student's responsibility to do the following:

- (1) Submit a written request to the instructor for an on-campus experiential component within one week of the start of the course.
- (2) Ensure that the activity on campus takes place and the instructor documents it in writing with a notice sent to the International Student and Scholar Services Office. ISSS has a form available that you may use for this purpose. F-1 Visa holders will be required to attend weekly scheduled office visits throughout the term.

Because the decision may have serious immigration consequences, if an F-1 student is unsure about his or her need to participate in an on-campus experiential component for this course, s/he should contact the UNT International Student and Scholar Services Office (telephone 940-565-2195 or email internationaladvising@unt.edu) to get clarification before the one-week deadline.

STUDENT EVALUATION OF TEACHING EFFECTIVENESS (SPOT):

The original SPOT committee was charged with providing to the Provost of the University of North Texas (UNT) a recommendation for an assessment tool to facilitate student evaluations of their instructors, allowing university-wide comparison in key areas. The SPOT's purpose is to provide a measure of teaching effectiveness as perceived by students. The SPOT scores for a particular instructor can be used for self-evaluation and improvement and for measuring improvement over time. The scale scores can also be aggregated into group scores for use by

administrators. In addition to providing needed information for UNT, the SPOT also satisfies the requirements of House Bill 2504 that calls for transparency in reporting and posting to the web.

Access: Students may access the SPOT at <https://MY.UNT.EDU> and selecting the SPOT banner.

INCOMPLETE GRADES:

Professors in the College of Business must seek authorization to grant incomplete grades. Requests must go through the Professor's Department Chair and the Dean. After approval, an incomplete grade may be entered into the Registrar's grade repository. In addition, the terms and conditions under which an incomplete grade may be granted are extremely narrow. Please consult the student handbook for more information.

BE PROFESSIONAL: (Circumstances Not Covered by UNT Policy)

Every semester a student will ask me for a deal that is not available to all students. A common mistake is to ask to extend deadlines for assignments and/or exams, because you missed the deadline. Under no circumstances will I grant such a request for it is unfair to other students. Missed assignments are assigned a 0. And the most unethical mistake is to ask for a higher grade at the end of the course when you did not earn it. There are points available in the course. Take advantage of them, because at the end of the course is too late. In effect, act professionally and be treated as such.

MGMT 3810 – Family Business
Course Outline – Spring 2019¹

Week	Date	Topic	Reading/Assignment
1	Jan 14	- Introduction & Overview - Research Methods - Introduction and Overview	Read the syllabus Hand-outs
	Jan 16	- The Nature, Importance, and Uniqueness of Family Business	Text: Chapter 1 Introduce Genogram
2	Jan 21	- The Nature, Importance, and Uniqueness of Family Business	Text: Chapter 1
	Jan 23	- The Family Dynamics Challenge Form Teams	Text: Chapter 2 Handouts
3	Jan 28	- The Family Dynamics Challenge - Form Teams	Text: Chapter 2 Handouts
	Jan 30	- The Ownership Challenge	Text: Chapter 3 Handouts
4	Feb 04	- The Ownership Challenge	Text: Chapter 3 Handouts Chapter Assignment 1 – Genogram Due Today
	Feb 06	- The Governance and Professionalization Challenge	Text: Chapter 4 Handouts
5	Feb 11	- The Governance and Professionalization Challenge	Text: Chapter 4 Handouts
	Feb 13	- Assessing the Family Business and Creating Conditions for the Continued Spirit of Enterprise	Text: Chapter 5 Handouts
6	Feb 18	- Assessing the Family Business and Creating Conditions for the Continued Spirit of Enterprise	Text: Chapter 5 Handouts Article Review 1 Due Today
	Feb 20	- Succession: Next Generation Development and Successor Selection	Text: Chapter 6
7	Feb 25	- Exam #1 (chaps. 1-5, research methods, videos, guest speakers, and additional materials)	
	Feb 27	- Succession: Next Generation Development and Successor Selection	Text: Chapter 6 Handouts Chapter Assignment 2 Due
8	Mar 03	- Succession and the Transfer of Power - Discussion	Text: Chapter 7 Handouts
	Mar 05	- Succession and the Transfer of Power - Discussion	Text: Chapter 7 Handouts

¹This schedule is not absolute. While every effort will be made to follow the schedule as listed, changes may be made as needed. It is your responsibility to be aware of any announced changes.

9	Mar 010	- Spring Break	
9	Mar 12	- Spring Break	University Closed.
10	Mar 17	- Change, Adaptation, and Innovation: The Future of Family Business	Text: Chapter 8 Handouts
	Mar 19	- Governance of the Family Business: Boards of Directors and Shareholder Meetings	Text: Chapter 9 Library
11	Mar 24	- Governance of the Family Business: Family Meetings, Councils, and Family Offices	Text: Chapter 10 Handouts Article Review 2 Due Today
	Mar 26	- Strategic Planning and Trans-generational Entrepreneurship	Text: Chapter 11 Handouts Chapter Assignment 3 Due
12	Mar 31	- Strategic Planning and Trans-generational Entrepreneurship	Text: Chapter 11 Handouts
	Apr 02	- Exam #2 (6-10, videos, additional materials, and speakers)	
13	Apr 07	- Estate Planning	Text: Chapter 12 Handouts
	Apr 09	- The Owners Plan	Text: Chapter 13 Handouts
14	Apr 14	- The Owners Plan	Text: Chapter 13 Chapter Assignment 4 Due
	Apr 16	- Financial and Wealth Management in the Family Business	Text: Chapter 14 Handouts
15	Apr 21	- Financial and Wealth Management in the Family Business - Key Nonfamily Management: The Visible Commitment to Managing the Family Business Professionally	Text: Chapter 14 Text: Chapter 15 Handouts
	Apr 23	- Key Nonfamily Management: The Visible Commitment to Managing the Family Business Professionally	Text: Chapter 15 Handouts
16	Apr 28	- Team Work Day	Library
16	Apr 30	- Team Projects Due - Word and Excel files due today Presentations due today	Team Project Due Today Team Presentation Due Shirt and Tie Day Peer Evaluations Due Today
17	May 07	- Final Exam Today (chaps. 11 - 15, videos, speakers, and additional material)	Location: BLB 005 Time: 10:30 am – 12:30 pm

I wish you Success and Peace!

Team # _____

Name _____

Project: _____

Signature _____

MGMT 3810

PARTICIPATION IN TEAM PROJECT

GRADING SHEET INSTRUCTIONS:

- * Evaluate the performance of each team member (**including you**) using the following criteria.
Did the individual display initiative while working on project?
Did the individual attend scheduled meetings?
Did the individual adequately complete assigned work?
Did the individual foster team spirit?
Did the individual contribute to project completion?
- * You must distribute a total of $[N \times 100]$ points among your team members based on each member's overall contribution to the team project. N = the number of individuals on your team. For example, if there are 7 members (**including you**) on the team, then the total number of points that must be distributed among the members of your team is: $7 \times 100 = 700$.
- * For any team member whose points are significantly above or below the team average (i.e., greater than 110, or less than 85), please make specific comments indicating why the team member received that score.
- * Fold the evaluation sheet and return it to the instructor with the finished report.

PERFORMANCE EVALUATION MATRIX

NAME OF TEAM MEMBER		POINTS ALLOCATED [Ensure that this column total = $[N \times 100]$]
1.		
2.		
3.		
4.		
5.		
6.		
7.		
Total Points		

Comments on **Highest** and **Lowest** rated team members.

Please be as specific as possible to explain your rating

Member Name _____

Member Name _____

Member Name _____

Member Name _____

MGMT 3810
Information for Integrated Team Project

1. Projects should follow the outline provided. Generally, they will run 18-20 pages for the analysis part of the analysis including recommendations.
2. Projects will use a spiral binding with cardstock covers minimum. Do not use card stock on the report body. Assumptions should be reasonable and clearly delineated in your plan. Use 12-point Ariel font, single character spacing, single line spacing, and APA parenthetical citation style (end of sentence). This will make submission to www.Turnitin.com easier to rectify. You will still create an APA style "Works Cited" section in your report. Use 1" margins on the left (for binding) and 1" on other sides. Levels one, two and three headings will be left justified. Use ¼ inch indentions for emphasis and bullet points.
3. Group members' names will appear in a txt box on the bottom of the cover page.
4. Include a "Table of Contents" (i) and a "Table of Figures" (ii) with page numbers for references. All pages should be numbered at the bottom right.
5. Your Executive Summary (page 1) should be about one page in length and should give a thumbnail sketch of what the report is about and how you are going to develop it.
6. Organizational charts generally are more desirable than writing out all the information which would be included in one.
7. Appendix —should be reasonable in length—work for quality not quantity. Generally anything over one page will go in the appendix. Start with the works cited pages (numbered), then special sections for HR, equipment, market research, etc. (numbered). The general appendix will include the first printed page of every reference (on-line and other) you use to write the business plan. Do not waste your time by scanning in general appendix pages or page numbering the general appendix.
8. Electronic files should be included of a copy of the entire project (minus diagrams, borders, art, etc.).
9. Evaluation—
 - Did you follow the format from class and this sheet?
 - Is this a comprehensive analysis of the firm?
 - Is it realistic?
 - Include concepts from the book and lecture?
 - Is it professionally done? Is the grammar and spelling correct?
 - Is it well thought out? Is it consistent?
 - Technical, Artistic, and Absolute ranking

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Written assignments in this course may be provided to Turnitin, an internet-based plagiarism detection service that is not affiliated with the University of North Texas. If you sign the form, your assignments may be submitted to the service with your name, student identification number, or a team identifying code**. If you do not sign the form, you must provide an identical copy of your assignment with personally identifiable information removed so that the material can be submitted to the service. This authorization is only to allow the instructor to more efficiently manage the course and will expire upon the issuance of a final grade. You are not required to sign this authorization and you will not be penalized if you do not sign the form.

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