



CIR Appendix

2014-2019



**UNIVERSITY OF
SOUTHERN MAINE**

July 1, 2019

Submitted to the Association to Advance Collegiate Schools of Business (AACSB-International)

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Note: In addition to the Continuous Improvement Review Report and the materials in the appendices, faculty CVs, faculty articles published in peer reviewed journals, and course syllabi can also be seen [online](#) and will be available in print during the visit.

APPENDIX 1: MBA TIMELINE

In 2013, Chancellor Jim Page first proposed creating a single MBA program for the University of Maine System housed in a projected Graduate and Professional Center on the USM campus in Portland. The Center would be a “model for entrepreneurial, multi-disciplinary graduate business and legal programs,” the Graduate and Professional Center would “drive economic development statewide.”¹ This vision, supported by the prospect of immediate and future funding by the Harold Alfond Foundation, included a single MBA program utilizing the graduate Business faculties of USM and the University of Maine in Orono. Together, these two would develop innovative curriculum taking advantage of the professional and business environment in Portland and Southern Maine. A year later Chancellor Page presented The Parthenon Group’s report and recommendation to move forward with the Center and to include in it “one integrated, entrepreneurial MBA program.” The following Spring, failed gubernatorial candidate Eliot Cutler was appointed CEO of the “Professional and Graduate Center Planning Initiative” and set up offices on the campus of USM, charged with developing a business plan. Over the next four years, multiple groups of faculty, administrations, assorted community leaders, and other interested parties, working in various configurations with different agenda, met repeatedly to figure out how to realize the Chancellor’s vision for issuing a UM degree on the USM campus with the help of USM faculty. A joint meeting of the faculties and administrators in May 2017, led immediately to the announcement of a \$7.5 million Alfond grant that summer, then the hiring of, first, an interim, then a permanent new Dean of the Graduate School of Business, and finally a pair of negotiated agreements this Spring: the “MBA Cooperating Agreement and Operating Guidelines” between the two faculties (Appendix 2) and a memorandum of Understanding between the two universities regarding revenue sharing and shared responsibilities (Appendix 3).

As the timeline below shows, the long process begun in 2013 of developing a new MBA in Portland to replace the one already here continues apace, though it has yet to produce a curriculum. People with a certain amount of experience in the academy can speculate why that might be so.

- | | |
|------------------------------|--|
| Fall 2013 | UMS Chancellor Jim Page proposes creating a professional and graduate center for entrepreneurial, multi-disciplinary business and legal programs to drive economic development statewide and secures private funding for a feasibility study to be conducted by the Parthenon Group. |
| Spring & Sum 2014 | The Parthenon group led weekly planning sessions involving both Deans and representatives from each faculty. |
| Nov 2014 | Chancellor Page presents the report of The Parthenon Group, “ Portland Professional and Graduate Center: Vision and Strategic Plan ,” to the Board of |

¹ Page announcement on the Alfond Center website.
<https://www.haroldalfondfoundation.org/pdf/announcements/141117Chancellorstatement.pdf>

Trustees. The report indicates strong support for the Center in the professional community and predicts the center will be self-sustaining in 2-5 years with doubled enrollments. According to the report, the Center's "one integrated, entrepreneurial MBA program" will report directly to the Chancellor, with business faculty receiving joint appointments to USM and UM schools of business. Anticipated opening of a single University of Maine MBA is Fall 2017.

- April 2015** Eliot Cutler is selected to serve as CEO of the Professional and Graduate Center Planning Initiative and charged with developing a business plan for the proposed center.
- Jan 2016** Cutler updates the Board of Trustees about including the Muskie School in the Center.
- Jan 2019** Chancellor Page charges UM/USM Joint Curriculum Task Force comprised of eight faculty from USM and UM to develop "within a couple of weeks" an initial curriculum planning document for the new MBA "that is collaborative, makes use of existing assets, and differentiates the two locations."
- March 2016** Alford Foundation approves \$500k for the next phase of the project.
- Spring 2016** Joint curriculum task with six members from UM and USM hold monthly meetings.
- April 2016** Memo from Chancellor Page to UM and USM Presidents specifying that "The Maine Center MBA program will confer a University of Maine degree" and asking them to "direct your Provosts to convene their respective business school faculties to develop a single MBA offering with an appropriate academic governance structure." He proposed that an outline of the proposed curriculum be completed by May 20 and a finished curriculum by June 17.
- May 2016** Innovation Table meetings end.
- May 2016** Joint meeting between UM and USM faculty to discuss MBA curriculum, led by USM and UM Provosts.
- Fall 2016** Dean Williams and USM faculty reps attend meetings with Center's Innovation Table led by Cutler.
- Sept 2016** President Cummings and Provost Uzzi meet with USM faculty to discuss the charge to MBA faculty to work on governance document.

- Oct 2016** Joint meeting with MBA faculty, President Cummings, and AFUM and Faculty Senate leadership.
- Oct 2016** The [UMS Board of Trustees](#) endorses the Maine Center for Graduate Professional Studies Business Plan dated October 2016 and directed that it be implemented in a multi-year phased approach. The Board supported the Chancellor’s efforts to pursue private funding for the project.
- Nov 2016** Provosts Hecker and Uzzi review faculty CVs and approve all USM MBA faculty to teach in any merged MBA program.
- March 2017** Joint meeting of representatives of USM and UM faculty produces 14-point agreement observing five principles laid out in 3/22 memo from Hecker and Uzzi:
1. The MBA program will be housed within a new University of Maine Graduate School of Business (UMGSB) located in Portland.
 2. The UMGSB will be led by a new Dean who will be responsible for administration of all aspects of the program and who will report to the UMaine Provost.
 3. The USM and UMaine MBA faculties will form a single MBA faculty, and members of that faculty will have equal status regardless of their home institution.
 4. The UMGSB will have a clear process for curriculum development.
 5. The UMGSB will include a standing committee advisory to its Dean that includes the USM Dean of the College of Management and Human Service the Dean of UMaine’s Maine Business School, and the USM Provost.
- May 2017** Joint meeting in Augusta of USM and UM faculty, deans, provosts, and presidents results in 16-point agreement.
- July 2017** Formal announcement of [\\$7.5 million gift](#) from the Harold Alfond Foundation to support the Maine Center for Graduate Professional Studies under the following parameters:
1. The MBA program will be housed within the “University of Maine Graduate School of Business.” The Graduate School of Business will house all graduate business programs within UMS.
 2. The University of Maine Graduate School of Business will have a “Leader” who will hold the title “Dean” or “Associate Provost” and will be based in Portland. This person will also hold a faculty appointment at rank of Professor.
 3. The MBA program will be delivered by UMaine faculty and USM Business faculty. USM Business faculty will hold an appointment at UMaine.
 4. UMaine and USM faculty will work together to innovate the MBA curriculum, pedagogy and programmatic options– taking advantage of the additional faculty resources and support.
 5. Graduate School of Business will have an advisory board.

6. USM will terminate its MBA program with admission to the program ended by June 30, 2018. (USM will develop a teach-out plan).
7. Two Harold Alfond Professors of Business will be hired at the Associate or Full Professor levels to start in Fall, 2018.

- July 2017** Conference call with AACSB with USM and UM deans and select faculty to discuss accreditation issues related to the joint MBA specific to each campus.
- Jan 2018** Dean of the Graduate School of Business hired and continues work on governance. This is a new position, distinct from the Dean of the Maine Business School and reporting directly to the UM Provost.
- ? 2018** Dean of the Graduate School of Business hired and continues work on governance. This is a new position, distinct from the Dean of the Maine Business School and reporting directly to the UM Provost.
- Oct 2018** HAF Faculty Fellows (2 from each university) selected to work on MBA curriculum and teach in the program.
- Dec 2018** Dean Weber begins a semester-long series of discussions and votes on Cooperating Agreement with each faculty, separately and together.
- Spring 2019** Two searches for MBA faculty with Appointments in the Graduate School of Business and Maine Business School and limited teaching in the USM School of Business
- April 2019** Provost Uzzi sends memo on “MBA Suspension and Teach Out” with Fall 2019 date for suspending admissions to USM MBA.
- May 2019** USM School of Business approves Cooperating Agreement on May 3, 2019.
- May 2019** UM/USM sign MOU on timeline, revenue sharing, and shared responsibilities for student services.

APPENDIX 2: MBA COOPERATING AGREEMENT & OPERATING GUIDELINES

Maine Business School
Graduate School of Business
Cooperating Agreement and Operating Guidelines
Approved by USMSB faculty on 12/14/18 @ 11:15am
Approved by MBS Faculty on 12/14/18 @ 3:45pm

I. DEFINITIONS

For the purpose of this Cooperating Agreement, the following definitions apply.

1. **Maine Business School (MBS):** MBS consists of both the Maine Graduate School of Business and the Maine Undergraduate School of Business. Both deans report independently to the UMaine provost.
2. **MBS Graduate School of Business (MBS-GSB):** MBS-GSB located in Portland, Maine, is responsible for the management and delivery of all graduate business programs for the UMaine System. Programs or Courses that originate in other disciplines that utilize business courses in their curricula or have business application are not required to be part of the MBS-GSB.
3. **University of Southern Maine School of Business (USMSB):** USMSB located in Portland, Maine is responsible for the management and delivery of all USM undergraduate business programs.
4. **Graduate Faculty:** The Graduate Faculty of the MBS-GSB is comprised of the appointed faculty of MBS at the University of Maine and the appointed faculty of USMSB at the University of Southern Maine.

II. PURPOSE

This Cooperating Agreement defines the major dimensions of how the USMSB Graduate Faculty of MBS Graduate School of Business (MBS-GSB) are appointed to and participate in the governance of MBS-GSB.

This Cooperating Agreement is designed to supplement existing governing documents and policies at the University of Maine and the University of Southern Maine, including but not limited to the charters, faculty shared governance policies, faculty Senate bylaws, University committees on Academic Affairs, collective bargaining agreements and all other applicable policies and state laws. Any conflict between this document and such other faculty governing agreements is unintentional and will be addressed by the MBS-GSB faculty as such conflict becomes apparent.

III. APPOINTMENT

The process and criteria for appointment and reappointment as Graduate Faculty to MBS-GSB are as follows:

1. The University of Maine Graduate School will facilitate Graduate Faculty appointments via the Record of Qualifications form/process, at the recommendation of the Dean of MBS-GSB, via the criteria/standards noted in item III.4, for the graduate status of the eligible faculty member. Initial appointments are for a period of 5 years. Subsequent re-appointments are for a period 5 years, utilizing the criteria as noted in item III.4.

2. The Faculty of MBS can be appointed as Graduate Faculty to MBS-GSB following the process and criteria established by MBS and the University of Maine Graduate School.
3. The Faculty of USM can be categorized as eligible Graduate Faculty following the criteria established by USMSB and the Graduate Council of USM. As noted in item III.1, the University of Maine Graduate School will facilitate the process of appointment (i.e. appointment letter) as a Graduate Faculty Member to MBS-GSB.
4. The Graduate Faculty appointment categories are as follows:
 - a. Full Graduate Faculty: Full Graduate Faculty possess a PhD or other terminal degree in a business discipline or related field and hold formal faculty appointments at the University of Maine Business School or the University of Southern Maine School of Business. During the previous five years, the individual must have earned at least satisfactory teaching evaluations, and the faculty member must have produced a minimum of two refereed publications or books (including research monographs and textbooks), and two other scholarly works or non-scholarly service activities of note. Other scholarly works include additional refereed publications, non-refereed publications, book chapters, presentations at academic conferences, publications in proceedings, and services as editor or a member of an editorial board to an academic journal. Other non-scholarly services activities include serving on Boards of Directors or officer roles in charitable or academic organizations, and significant consulting work with state, national, and international businesses, non-profit organizations, and governments.
 - b. Associate Graduate Faculty: Associate Graduate Faculty possess a PhD or other terminal degree in a business discipline or related field but do not meet the requirements of Full Graduate Faculty. Associate Graduate Faculty hold formal faculty appointments at the University of Maine Business School or the University of Southern Maine School of Business. During the previous five years, the individual must have earned at least satisfactory teaching evaluations and have remained active in the field by producing a minimum of two scholarly works or non-scholarly service activities of note in the previous five years. Activities counting toward the two include: refereed publications, non-refereed publications, books, presentations at academic conferences, publications in proceedings, editorial service to an academic journal, serving on Boards of Directors or officer roles in charitable or academic organizations, and significant consulting work with state, national, and international businesses, non-profit organizations, and governments.
 - c. Graduate Instructors: Graduate Instructors have earned at least a master's degree in a business discipline or related field and hold formal, full-time appointments at the University of Maine or the University of Southern Maine. During the previous five years, the individual must have earned at least satisfactory teaching evaluations.
 - d. External Graduate Faculty: Members of the External Graduate Faculty are individuals who do not hold appointments at the University of Maine or the University of Southern Maine or are considered Part-time faculty at either institution. External faculty members must be appointed as cooperating faculty to the MBS-GSB and must meet, at minimum, the standards of a Graduate Instructor.
 - e. Emeritus Graduate Faculty: Emeritus Graduate Faculty may teach graduate classes. Appointment to this status requires that the faculty member have retired from the University of Maine or the University of Southern Maine faculty as a Graduate Faculty member in good standing, and have a record of successful engagement in graduate education as an instructor of one or more graduate classes over the preceding five years.

5. The Graduate Faculty of the MBS-GSB designated as Full Graduate Faculty, Associate Graduate Faculty, and Graduate Instructors shall have full and equal voting rights with respect to MBS-GSB curriculum and governance. They shall be referred to as Voting Members.
6. Additional Graduate Faculty from other Schools and Universities within UMS may participate via a Multi-Institutional Graduate Faculty Group (MGFG). They shall be considered Non-Voting Members and be considered External Graduate Faculty.

IV. PARTICIPATION

The USMSB Faculty and the MBS Faculty that have been appointed as Graduate Faculty to MBS-GSB shall have full and equal voting rights with respect to MBS-GSB curriculum and governance. They shall be referred to as Voting Members.

IV.1. ARBITRATION CLAUSE

In the spirit of an equal and fair joint venture between USMSB and MBS faculty, arbitration should be used in the event of an unresolved issue that normal discussion and voting procedures cannot resolve. The arbitration process can be initiated at the request of the MBS-GSB Dean or a 2/3 majority of the representative Graduate Faculty from either MBS or USMSB. The arbitrator should be an independent third party agreed upon by the Graduate Faculty from MBS and USMSB. The decision of the arbitrator shall be binding.

IV.2 MEETINGS

Meetings of the MBS-GSB Graduate Faculty shall be held regularly to make or revise policies and practices governing the academic affairs of the School. A faculty meeting may be called by the dean or by petition of 25% of the faculty.

Reasonable means should be employed to notify all members of the faculty of the time, place and subject matter of the meeting at least 7 days in advance of said meeting.

IV.2.1. RULES OF ORDER

The proceedings of the faculty shall be guided by the latest edition of Robert's Rules of Order. If any dispute as to procedure arises, Robert's Rules will be employed to settle the procedural issue.

IV.2.2 QUORUM

A MBS-GSB Graduate Faculty meeting shall have quorum when more than 50% of the Voting Members are present. Every effort should be made to provide attendance options via distance technology, and facilitate equal representation.

IV.2.3 VOTING

1. All academic policy or changes to MBS-GSB curriculum and governance must be approved by the majority of MBS-GSB Voting Members in attendance. Every effort should be made to provide attendance options via distance technology, and facilitate equal representation.
2. Proxy votes will not be considered.

IV.2.4. AGENDA

At least 5 days prior to any regular or special meeting of the faculty, the graduate dean shall distribute an agenda for the meeting to each faculty member of the MBS-GSB. Faculty members wishing to place an item on the agenda shall submit it to the deans' office at least seven days in advance of the meeting. The agenda shall contain the full text of any policy changes to be voted on at the meeting.

IV.3. COMMITTEES

1. COORDINATING COMMITTEE

The MBS-GSB Coordinating Committee is responsible for the appointment of faculty members and/or staff to serve on graduate committees. Membership will include the MBS-GSB Dean, the USMSB Dean, and the MBS-UGSB Dean. The committee will facilitate reasonable efforts to balance membership between functional areas, rank and other relevant factors specific to the charges of the committees. Every effort should be made to have equal faculty representation from MBS and USMSB. The coordinating committee is responsible for working together to coordinate the delivery of the graduate and undergraduate programs at MBS and USMSB.

2. STEERING COMMITTEE

The MBS-GSB Steering Committee will serve in an advisory role to the MBS-GSB Dean. Among the Committee's major tasks is the management of the strategic planning process, administrative matters such as budget management, course scheduling, faculty teaching assignments, and matters of accreditation. The committee works to ensure that processes and procedures are in place to enable the MBS-GSB to achieve its mission, continue to meet AACSB accreditation standards (including Standard 5 – Faculty Sufficiency), and deliver high-quality graduate programs. As a procedural note for curriculum development and delivery, at least 50% of the delivered credit hours should be delivered via MBS faculty, per AACSB Standard 11, item E (4th bullet, under basis for judgement). The Steering Committee is comprised of the Dean, the Chair of the Graduate Curriculum and Learning Committee, the Director of the MBA Program, and up to four members of the faculty and staff appointed by the MBS-GSB dean with representation from MBS and USMSB.

3. GRADUATE CURRICULUM AND LEARNING COMMITTEE (GC&LC)

The Graduate Curriculum and Learning Committee ensures that MBS-GSB programs support the School's mission and reflects changes in the needs of students and employers. The Committee devises a formal process for planning, evaluating, and revising the graduate curriculum, and engages relevant stakeholders on an annual basis in an assessment of the opportunities for curricular innovation based on trends in the general business environment.

The Committee is responsible for reviewing admission policies for MBS-GSB and recommending any needed changes to the faculty, as well as approving any exceptions to the standards to yield results consistent with the objective of producing high-quality graduates. The committee will consist of equal representation from MBS and USMSB Graduate Faculty. Ideally and initially the committee will have Co-chairs, filled by the HAF Faculty Fellows from MBS and USMSB. The MBA Director will serve as an ex-Officio member of the committee. In the absence of an MBA Director, the MBS-GSB Dean will serve as an ex-Officio member of the committee.

The Committee ensures that MBS-GSB has well-documented and systematic process for determining, revising, and assessing degree program learning goals. The Committee is ultimately responsible for the assessment of graduate program goals, for assuring that the assessment data is analyzed, and for implementing continuous improvement changes approved by the faculty.

A subcommittee comprised of the Dean of MBS-GSB and the GC&LC Co-chairs will conduct an annual review of courses, course evaluations, faculty activities, and other materials/mechanisms to collect the necessary data for continuous improvement activities and the annual completion of

AACSB tables 15.1 and 15.2. The purpose of this review process is for programmatic continuous improvement, and it is not part of the annual review or P&T process for faculty.

IV.4 AUTHORITY

The graduate faculty shall be the policy-making body of the School with respect to curriculum. The graduate faculty, in consultation with the MBS-GSB administration, shall be the policy-making body of the School with respect to academic policies and practice, and other issues pertinent to faculty governance.

V. AMENDMENT OF THIS AGREEMENT

This Cooperating Agreement may be amended at any regular or specially called meeting of the faculty, providing that the faculty shall have been notified of the proposed amendment at the regular meeting of the school immediately preceding the meeting at which the amendment is to be considered for adoption. The amendment shall be read and discussed at a first meeting, and then voted on during a subsequent second meeting, to allow for edits and a second reading. A two-thirds majority of all members present and voting must agree to amend this agreement. The text of the amendment shall be included with the agenda of the meeting of the graduate faculty at which consideration is to occur.

APPENDIX 3: UM/USM MBA MEMORANDUM OF UNDERSTANDING

DRAFT
UNIVERSITY OF MAINE – UNIVERSITY OF SOUTHERN
MAINE MEMORANDUM OF UNDERSTANDING
REGARDING
THE GRADUATE SCHOOL OF
BUSINESS (May 12, 2019)

Purpose

The University of Maine (UMAINE) and the University of Southern Maine (USM) agree to collaborate to improve and expand graduate professional education opportunities. The creation of the Graduate School of Business is an important component of this collaboration. The Graduate School of Business will offer the MBA program in Portland and Orono and online and will house all future graduate programs in Business developed by any University of Maine System university. The Graduate School of Business faculty is comprised of UMaine Business faculty members with graduate appointments and Business faculty from USM with graduate appointments at UMaine. This collaboration will produce several benefits for students, faculty, the university and the state of Maine including the following.

1. **Expand graduate Business Faculty.** Bringing together the graduate Business faculty of the two institutions, and the planned addition of two faculty member devoted 100% to the Graduate School of Business, creates opportunities for curricular innovation, program delivery innovation, research collaboration, and new program development.
2. **Expand interdisciplinary opportunities.** The Graduate School of Business is part of the Maine Graduate Center for Graduate Professional Study, a collaborative with University of Maine School of Law and USM's Muskie School of Public Service. There will be increased opportunities for curricular and research collaborations among these programs.
3. **Coordinate graduate Business offerings.** Historically, there have been two MBA programs offered in the University of Maine System, one at UMaine and one at USM. The Graduate School of Business will house UMS's only MBA program. A single MBA program will eliminate competition between the two UMS programs, provide opportunities to innovate and expand graduate education in Business and, consequently, better serve students and the state of Maine.

Timeline

There will be a "soft launch" of the Graduate School of Business's MBA program in the fall 2019. USM will continue to admit students into its MBA program until fall 2019 after which time new admissions will cease. The full launch of the Graduate School of Business MBA program will be in fall 2020. USM will develop a teach-out plan for students enrolled in its MBA program so students have the option of completing that program. Students enrolled in the USM MBA program will have the option of transferring into the Graduate School of Business MBA program at any time.

Revenue Sharing

The University of Maine and the University of Southern Maine agree to share the revenue (i.e. tuition and fees) produced by both MBA programs equally for the first three years of this

collaboration (FY2020, 2021, 2022). In the third year of this agreement there will be a collaborative review of the contributions of, and costs encumbered by, both universities in the delivery of the graduate programs offered through the Graduate School of Business and the revenue-sharing agreement will be recalculated so that it better reflects the contributions of the universities.

General Contributions of Each University

The University of Maine and the University of Southern Maine will be equal partners in the planning, management and delivery of programs offered through the Graduate School of Business. Faculty members with appointment in the Graduate School of Business will have equal responsibility for curriculum and governance decisions regardless of which university is their primary appointment. The intent is for the Graduate School of Business faculty to operate as a single unit. The teaching, advising and service workload will be distributed so that faculty with appointments at UMaine and faculty with appointments at USM will share equally in the delivery of programs to the greatest extent possible.

The Dean of the Graduate School of Business has primary responsibility for leadership and management of the School. Given the collaborative nature of the program, however, there will be regular engagement of the provosts from both universities as well as the Dean of USM's College of Management and Human Service in management decisions. The two provosts and two deans will meet at least quarterly to review progress and address concerns that may arise. Furthermore, USM administrators and faculty members with appointments in the Graduate School of Business will provide input into the Dean of the Graduate School's performance reviews.

University of Maine

1. UMaine Business faculty members with graduate appointments will teach and advise Graduate School of Business students. They will conduct research at a level consistent with their appointments and will provide service in support of the School.
2. UMaine will administer the Graduate School of Business including but not limited to admissions, financial aid, and course scheduling in consultation with USM administration. UMaine's Graduate School will support the operations of the Graduate School of Business.
 1. Dean of the Graduate School of Business will have primary responsibility for the administration of the School.
 2. UMaine will provide classroom, office and meeting space in support of the School.
 3. UMaine's Office of Enrollment Management will collaborate with USM's Office of Enrollment Management to market and recruit students.

University of Southern Maine

1. USM Business faculty members with graduate appointments will teach and advise Graduate School of Business students. They will conduct research at a level consistent with their appointments and will provide service in support of the School.
2. The Dean of the College of Management and Human Service and the Provost will

collaborate with the Dean of the Graduate School of Business to support the Graduate School of Business.

3. USM will provide classroom, office, and meeting space in support of the School.
4. USMs Office of Enrollment Management will collaborate with UMaine's Office of Enrollment Management to market and recruit students.

Services for Students Enrolled in the Graduate School of Business

Services for Students with Disabilities

Among the University of Maine System Campuses, standard practice is that the campus which originates a course is responsible for determining reasonable accommodations. Responsibility for implementation of accommodations will depend on the specific type of accommodations, and delivery modality of the course. Students with disabilities enrolled in Graduate School of Business programs will be jointly served by the UMaine Accessibility Services office and the USM's Center for Students with Disabilities office.

Students taking courses at USM will be receive services from the USM's Center for Students with Disabilities office and students taking courses at UMaine or online will receive services from UMaine's Accessibility Services office.

Relevant files will be maintained on both campuses. Students who have concerns or complaints regarding accommodations will be required to communicate with the USM Center for Students with Disabilities Director or the UMaine Accessibility Services Director depending on the nature of the concern.

Student Conduct

All students In the University of Maine System are governed by a common UMS Student Conduct Code, although campus procedures may vary. Allegations of violations of academic Integrity by students will be adjudicated by the appropriate offices at the home university of the instructor.

Allegations of violations of conduct outside the classroom by students will be adjudicated by UMaine personnel. Each institution will support the other in fact finding as needed and will share case outcome information when the information impacts the activities/services of the other institution.

Student Support Services

Students attending courses on the UMaine campus will have access to the same services as all UMaine students and will be governed by the same use policies:

- Career Services Fitness Center
- Student Activities & Intramural Activities Student Clubs & Organizations
- Tutoring Services including the Writing Center Departmental Student Employment Opportunities Library Services
- Cutler Health Center UMaine Counseling Center On-Campus Parking Emergency Alert System

Students attending courses on the USM campus will have access to the analogous services at USM. Student Health Insurance

UMaine will manage the communication, billing, enrollment, waiver, and appeal process for all students.

Clery Reporting

USM staff will assist in providing UMaine staff with any crime statistics required to meet UMaine’s Clery reporting requirements.

Title IX

Any required training for students will be initiated and monitored by UMaine. The Title IX Coordinators for the two universities and their staffs will serve as the onsite contacts for students to report Title IX issues and concerns.

Other Issues:

Each university will designate a point person to help resolve any additional issues related to student services and support as they arise.

A formal review of the terms of this agreement will take place in the 2021-2022 academic year. The agreement will end on June 30, 2022. The agreement may be terminated at any time prior to that date by mutual agreement between the two parties.

Joan Ferrini-Mundy date
President
University of Maine

Glenn Cummings date
President
University of Southern Maine

APPENDIX 4: MISSION AND CORE VALUES

MISSION STATEMENT:

We prepare lifelong, entrepreneurial thinkers fluent in business technologies.

MISSION STATEMENT COMPONENTS:

1. The USM School of Business prepares students through community-engaged, applied, and experiential learning.
2. We develop innovative and creative thinkers comfortable with ambiguity and able to adapt to change.
3. We give students the tools, techniques, and analyses to support strategic and operational goals while recognizing potential disruptors and enablers in the environment.
4. We promote intellectually curious, lifelong learners open to seeing the world differently and able to recognize and seize opportunities, understand and analyze risk, plan and marshal resources, and act on solutions to create value.

CORE VALUES:

1. Student learning and success is our first priority and assumes meaningful student/faculty interactions and relationships.
2. We are committed to creating and maintaining an atmosphere of respect, responsibility, and integrity.
3. We value diversity of thought and culture.
4. We believe good business requires ethical principles and sustainable practices.
5. We believe alumni and community partners offer valuable insights about how we fulfill our mission.

APPENDIX 5: USM MISSION, ACADEMIC PILLARS, AND STRATEGIC GOALS

USM MISSION

The University of Southern Maine, northern New England's outstanding public, regional, comprehensive university, is dedicated to providing students with a high-quality, accessible, affordable education. Through its undergraduate, graduate, and professional programs, USM faculty members educate future leaders in the liberal arts and sciences, engineering and technology, health and social services, education, business, law, and public service.

Distinguished for their teaching, research, scholarly publication, and creative activity, the faculty are committed to fostering a spirit of critical inquiry and civic participation. USM embraces academic freedom for students, faculty, and staff, and advocates diversity in all aspects of its campus life and academic work. It supports sustainable development, environmental stewardship, and community involvement. As a center for discovery, scholarship, and creativity, USM provides resources for the state, the nation, and the world.

- This Mission Statement was passed by the USM Faculty Senate on October 3, 2008, and approved by the University of Maine System Board of Trustees on November 15, 2010.

PROVOST'S FOUR [ACADEMIC PILLARS](#)

1. A Focus on Relationships: To learn effectively, students must feel connected to their community.
2. A Future-Forward Curriculum: USM provides students foundational education and learning opportunities for intellectual risk-taking and self-maturation through rigorous and free inquiry, research, and creativity.
3. The Integration of Learning and Work: At USM we understand the working student, and we value student work. Our academic programs integrate student work with academic learning in a way that is responsive to students' complex lives.
4. A Mission of Service and Citizenship: USM offers place-based education with community engagement, service learning, and internship opportunities.

PRESIDENT'S [NINE GOALS](#)

1. USM will be known for academic excellence with real-world experiences as a core part of its academic program.
2. 80% of our students will state that at least one individual (staff or faculty) knows them well, supports them, and believes in them.
3. 72% of first-year, full-time students will return to USM for their second year.
4. 10% of our alumni will give to USM annually.
5. The USM Foundation will raise \$50 million in scholarships, infrastructure, and investments for our students.
6. USM headcount enrollment will reach 10,000.
7. USM will be designated as a 'Great Colleges to Work For®'.
8. 80% will recommend USM to others.
9. USM will establish a sustainable financial model by attaining industry standards attributable to a financially healthy institution.

APPENDIX 6: USM SCHOOL OF BUSINESS STRATEGIC PLAN, 2019-2022

GOAL	STRATEGIC DIRECTION	ACTION PRIORITIES	1ST YEAR COSTS	ON-GOING COSTS	FUNDING SOURCE	START DATE	RESPONSIBILITY
Goal 1 Innovate the Curriculum	1.1 Launch and implement the new curriculum emphasizing entrepreneurial thinking and business technologies.	1.1.1 Develop a set of technology management tools, including integrating SAP into the curriculum	\$25,000	\$15,000	Strategic Investment Fund for start-up costs. Funded through accreditation fees.	Fall 2019	A Kohli B Heiser
		1.1.2 Establish MS Excel Certification and Certiport testing Center	\$25,000	\$25,000	Strategic Investment Fund for start-up costs. Self-funded through testing fees	Fall 2019	J Kuenz K Cavallero
		1.1.3 Develop a management major	\$0	\$0		Fall 2020	R Arend J Lie A Kohli
	1.2 Review Assurance of Learning program and align with new curriculum.	1.2.1 Develop a matrix for mapping the mission onto the new curriculum.	\$0	\$0	n/a	Fall 2019	AoL & Curriculum Committees
		1.2.2 Review Capstone Exam and revise or explore returning to Field Test as an alternative.	\$10,000	\$10,000	Strategic Investment Fund for start-up costs. Self-funded through testing fees	Approved Spring 19; Implement Fall 2020	AoL Committee
		1.2.3 Add curriculum-specific questions to course evaluations.	\$0	\$0	n/a	Fall 2019	Faculty
	1.3 Maintain a comprehensive evaluation process for all programs, personnel, policies, and practices.	1.3.1 Re-evaluate course enrollment caps to support new experiential and entrepreneurial thinking requirements	\$0	\$0	n/a	Fall 2019	Curriculum Committee

	1.4 Forge new curricular collaborations within USM and UMS.	1.4.1 Develop Commercialization Curriculum with Maine SBDC and Law School.	\$0	\$0	n/a	Fall 2019	R Bilodeau
		1.4.2 Collaborate within USM and with UMO to develop specialized masters in Data Science, Business Analytics, Accounting	\$0	\$0	n/a	Fall 2019	J Suleiman S Hansen
Goal 2 Improve student success and retention	2.1 Support consistent and effective advising.	2.1.1 Support transition to faculty advisors.	\$0	\$0	n/a	Fall 2020	Dept. Chairs, M Burns, J Kuenz, R. Bilodeau
		2.1.2 Develop a 3-year course rotation.	\$0	\$0	n/a	Fall 2019	J Kuenz
	2.2 Promote and evaluate teaching that includes experiential learning, community engagement, and other high impact teaching strategies.	2.2.1 Integrate Learning Assistants into Sport Marketing and Production/Operations Management courses.	\$0	\$0	Institutional funding – Advising Center Grant	Fall 2020	E Newell A Kohli
		2.2.2 Increase faculty and student collaboration with STEM in the CI2Lab .	\$0	\$0	n/a	Fall 2019	
		2.2.3 Identify metrics to assess impact of teaching practices.	\$0	\$0	n/a	Fall 2019	IIE Committee
	2.3 Increase opportunities for and participation in internships, student research, and study abroad.	2.3.1 Work with International Programs to streamline the planning process for studying abroad.	\$0	\$0	n/a	Fall 2019	Faculty in travel courses (Heiser, Bilodeau, Parker)
2.3.2 Create online system for gathering Internship feedback.		\$0	\$0	n/a	Fall 2019	K Cavallero	
2.3.3 Identify funding and other ways to support student research.		\$3000	\$3000	Annual Fund	Ongoing	J Kuenz	
Goal 2 Improve student success and retention	2.4 Increase student participation in extracurricular programming, including community projects and clubs.	2.4.1 Include club membership info on syllabus and website. Revive club activities	\$1000	\$1000	Annual Fund	Fall 2019	C Alexander B Liotard
		2.4.2 Explore the possibility of an SB common hour in new schedule blocks.	\$0	\$0	n/a	Fall 2019	J Kuenz

		2.4.3	Increase participation in Husky Day of Service	\$1000	\$1000	Annual Fund	Spring 2020	
	2.5 Create and promote opportunities for professionalization.	2.5.1	Pilot 3 badges in AY 2019-2020: professional development, technology, entrepreneurial thinking.	\$10,000	\$10,000	Strategic Investment Fund	Fall 2019	R Bilodeau, Z Xu, H Parker, E Newell, R Yousefvand-Mansouri
		2.5.2	Identify a Career Hub liaison.	\$0	\$0	n/a	✓	Chanel Lewis,X4660
		2.5.3	Identify courses that will require LinkedIn profiles.	\$0	\$0	n/a	Fall 2019	
		2.5.4	Arrange for students to get headshots	\$1,000	\$1,000	Dean's Operating Budget	Fall 2019	
Goal 3 Enhance Faculty Growth and Development	3.1 Create and maintain a comprehensive faculty planning process that attracts, develops, and retains an appropriate balance of highly qualified participating and supporting faculty members.	3.1.1	Invite Libra Professor to lead faculty seminars in new research methodologies.	\$120,000 (1 year only)	n/a	Libra Professorship Endowed Fund	Spring 2020	Libra Committee (B Heiser, E Newell, G Palin)
		3.2 Implement the School's mentoring program to support new faculty in teaching, research, and service.	3.2.1	Reintroduce Faculty Workload Plans	\$0	\$0	n/a	Fall 2019
	3.3 Hold local conferences and executive seminars to showcase faculty expertise.	3.3.1	Support the LL Bean Chair's outreach and engagement with the business community	\$10,000	\$10,000	LL Bean Endowed Fund	Fall 2019	
		3.3.2	Revive and refocus Ethics Symposium on financial literacy.	\$3,000	\$3,000	Ethics Symposium Gift Fund	Fall 2019	
	3.4 Recognize and reward faculty research and other accomplishments.	3.4.1	Revive Brown Bag seminars	\$600	\$600	Dean's Operating Budget	2 held AY 2018-2019	J. DiBartolomeo
		3.4.2	Promote faculty research on School website, newsletter, bulletin board, social media	\$0	\$0	n/a	Ongoing	C Alexander

	3.5 Identify resources to support faculty development in research and teaching.	3.5.1 Secure Bloomberg terminal and Qualtrics on campus	\$22,000	\$22,000	Provost's Office	Fall 2019	Provost
Goal 4 Establish and Grow Partnerships	4.1 Continue to build an effective advisory board and identify a strong leader for it.	4.1.1 Work with Advisory Board Chair to identify speakers/experts on the Board and in the community that faculty can invite to speak to classes.	\$0	\$0	n/a	Spring 2019	J Williams
		4.1.2 Target entrepreneurial and technology companies to develop new internships and service learning opportunities.	\$0	\$0	n/a	Fall 2019	K Cavallero
	4.2 Establish and build a formal relationship between the School and the Career/Employment Hub	4.2.1 Develop community-based projects with the Career Hub	\$1000	\$1000	Annual Fund	Fall 2019	Faculty
		4.3 Cultivate strong connections with Alumni Relations and Development.	4.3.1 Develop alumni recognition program, e.g., a School Hall of Fame	\$2,500	\$2,500	Annual Fund	Fall 2019

APPENDIX 7. INNOVATION, ENGAGEMENT, AND IMPACT TABLE

GOAL 1 – INNOVATE THE CURRICULUM

INNOVATION	ENGAGEMENT	IMPACT
<p>Approved Curriculum Revision: H. Parker led the School in a 2-year process of revising the School mission and undergraduate degree to emphasize a thematic core focused on entrepreneurial thinking and business technologies. This new thematic core includes a revised Technology Management course (the current BUS 345 Info Tech/MIS) and a new course, BUS 3XX Entrepreneurial Thinking which will give students a basic knowledge of identifying opportunities, assessing required resources, planning and executing an entrepreneurial venture while developing an understanding of value propositions and risks.</p>	<p>Engaged with community business partners, Advisory Board, undergraduate business students</p>	<p>The new curriculum was approved at the May 2018 retreat and is scheduled to begin in Fall 2020. Minor changes and corrections were made in AY 2018-2019.</p>
<p>New Minor: Risk Management & Insurance (2015)</p>	<p>The RMI minor utilizes an interdisciplinary list of possible elective courses from across the entire university.</p>	<p>Encourages students outside the School of Business to consider an RMI education.</p>
<p>New Major and Minor: Business Analytics (2018)</p>		<p>12 majors enrolled in its first semester.</p>
<p>R. Bilodeau developed and deployed entrepreneurship track with Food Studies Program.</p>		<p>50 students have enrolled in the track.</p>
<p>Revised Major: H. Parker and E. Newell revised the entire Sport Management major curriculum to bring it more in alignment with the new School curriculum and to reflect changes in the field. The revision eliminates three courses and substantially revises four others. For example, Athletic Administration has become Sport Governance & Policy. Similarly, Financial Aspects of Sports is now Revenue Generation in Sport. The new course requires students to design a fundraising campaign as it exposes them to a broad range of topics related to revenue generation in the sport</p>		<p>Begins Fall 2019</p>

GOAL 1 – INNOVATE THE CURRICULUM

INNOVATION	ENGAGEMENT	IMPACT
industry, including ticket sales, sponsorship, fundraising, and public funding.		
Proposed New Concentration: P. Griffin and other Marketing faculty proposed a new 9-credit concentration in Professional Selling with courses in selling and sales. Approved by school-wide Curriculum Committee for inclusion in the new Management Major and revised school curriculum.	Required internships and a new practicum course will allow students the field experience to test theories and practice skills in real world settings.	The new concentration will be available in the revised School curriculum beginning Fall 2020. Once it is implemented, USM will be the first college or university in Maine to offer a degree with a concentration in Professional Selling.
Proposed New Concentration: A. Kohli and other management faculty have proposed a new 9-credit concentration in Supply Chain Management with new courses proposed in Project Management, Supply Chain Management, Procurement, Supply Chain Analytics, and Quality Management. Approved by school-wide Curriculum Committee for inclusion in the new Management Major and revised school curriculum.		The new concentration will be available in the revised School curriculum beginning Fall 2020. Once implemented, it will be one of only two institutions of higher learning in Maine to offer SCM/logistics (the other is Maine Maritime Academy, which enrolls under 1000 undergraduates total). More than 50 local companies hire supply chain/operations management professionals. The placement rate for students with these skills is 85%-100%
In Development: Commercialization Curriculum. Development of a formal (certificate) and informal (badge) program designed to assist entrepreneurs, students, and the business community with commercialization. The curriculum will be delivered in three parts: (1) Ideation and feasibility, (2) Product development, and (3) Commercialization and innovation.	Faculty and students will collaborate with the Maine SBDC (counseling), the Law School (patent and clinic program), and UMaine Foster Center for Innovation , the Maine Graduate and Professional Center (accelerator space), MeRTEC (compliance and regulatory training), the Ci2 lab (space for creative work and research), Dubyak Center for Digital Science and Innovation (product development space), the Greenlight Maine Pitch Academy and UMaine business plan competition	
New Course: R. Bilodeau developed a new course, Design Thinking, which is cross-listed with USM’s Honors Program.	Students have demonstrated the techniques of design thinking at two workshops across campus.	49 Business majors are enrolled in USM’s Honors Program.
New Course: G. Palin developed BUS 388, Launching a Global Social Enterprise		
New Course: In 2016, Z. Xu developed BUS 356, Digital Marketing, as an experiential course.	In Spring 2017, he incorporated the Google Online Marketing Challenge into the course. Using a \$250	In Spring 2019, 6 student teams were able to successfully apply for a \$10,000 Google Ads

GOAL 1 – INNOVATE THE CURRICULUM

INNOVATION	ENGAGEMENT	IMPACT
	Google Ads Grant, a student team helped the USM Quality Control Lab generate around 5,000 impressions and 2 conversions (new customers).	Grant on their Google Ads campaigns with a non-profit business.
New Course: R. Bilodeau developed BUS 386: Creative Strategies for Entrepreneurs.	The course is taught as the intersection of creative thinking, entrepreneurial decision-making, and neurobiology.	To date, 119 students have taken or are taking this course. Student course evaluations have averaged a score of 4.92/5 over the first three semesters.
Expanded Access: D. Kerr expanded the use of his RMI courses to include a real-time polycom link to a classroom at another University of Maine campus (Presque Isle).	Insurance companies can now have employees take the RMI classes from across the state. The course particularly helps those new to the industry tie together the various functions of insurance and receive more clarity around terminology they hear day to day.	12 insurance company employees have completed the RMI certificate via polycom (4 employee students per calendar year since 2016).
Collaboration: BUS 260 Marketing was offered on the campus of the Maine College of Art (MECA) as part of its Art and Entrepreneurship.	This course spearheads a larger initiative to provide USM and MECA students opportunities to learn from each other in the classroom.	
Engaged Learning: USM’s new Engaged Learning core curriculum requirement was approved in 2017 and will begin in Fall 2019.	In addition to all school internships, practica, independent studies, and travel courses, 12 other School of Business courses have been approved for meeting the characteristics and outcomes of an Engaged Learning core course.	The accessibility of engaged learning courses across the business curriculum lowers the overall credit requirements for majors and gives them multiple opportunities “to bring theory to practice by applying their knowledge, skills, and abilities in contexts beyond the classroom.”
Experiential/High Impact Course Revision: Converted MBA 644 to MBA 674 Strategic Management of Technology and Innovation.	Introduced cases and simulations to the course.	
Experiential/High Impact Course Revision: J. Voyer revised BUS 450 Business Policy and Strategy.	Introduced system dynamics projects with regional firms.	
Experiential/High Impact Course Revision: Z. Xu incorporated the Google Online Marketing Challenge into BUS 356, Digital Marketing, making it an even more experiential course.	In spring 2019, 6 student teams were able to successfully apply for a \$10,000 Google Ads Grant on their Google Ads campaigns with a non-profit business.	Using a \$250 Google Ads Grant, students helped the USM Quality Control Lab generate around 5,000 impressions and 2 conversions (new customers).
Experiential/High Impact Course Revision: J. Lie redesigned both undergraduate and graduate Leadership courses into fully case-based courses.	Revision will make the course more practice-oriented and intellectually engaging than the previous version.	

GOAL 1 – INNOVATE THE CURRICULUM

INNOVATION	ENGAGEMENT	IMPACT
Experiential/High Impact Course Revision: J. Lie developed an experiential learning activity for BUS 340 Managing Organizational Behavior.		
Experiential/High Impact Course Revision: R. Heiser designed and implemented a country evaluation decision matrix.	Students use the matrix to examine marketplace potential, develop a market-entry strategy, and prioritize different country-markets for sales potential and competitive intensity.	
Experiential/High Impact Course Revision: H. Smoluk added a sealed-bid Dutch auction to FIN 320, Basic Financial Management to determine the real worth of extra credit assignments.	Students privately bid in class on extra credit points. The assignment is in the form of attending a local CFA (Charter Financial Analysts) speaker event. Students know the supply – up to 5 students may attend – and then bid. The 5 lowest bids get the extra credit. The fifth highest bid becomes the value of the assignment.	
Experiential/High Impact Course Revision: J. DiBartolomeo incorporated in his MBA Financial Models course a case study from the accounting literature on the use of real options in corporate investment decisions.	This change addressed the need expressed by the American Institute of Certified Public Accountants for CPAs to understand risk-management in the corporate decision-making process.	This enhanced the MBA curriculum and was well-received by students.
Experiential/High Impact Course Revision: D. Tharp acquired free access to eMoney Advisor software for students in FIN 321 and FIN 399.	Students gained real-world experience to developing a financial plan using leading industry software.	
Experiential/High Impact Course Revision: D. Kerr included an insurance simulation game in RMI courses that could be played by interns (and others new to insurance).	The game exemplifies the probability of loss against cost of coverage and how it can impact the policyholder (i.e. the value of our product).	
Experiential/High Impact Course Revision: H. Parker revised Sport Management course.	Students required to design the perfect retail space (team shop and sporting goods store) based on academic literature as well as numerous observational field visits to various stores.	
Experiential/High Impact Course Revision: H. Parker required Sport Consumer Behavior students to create a documentary about a fan base.	The assignment required some original research, including interviewing and surveying fans, as well as basic proficiency in a video editing software.	Instructor learned a new presentation format (documentary). Students excelled with this project.

GOAL 1 – INNOVATE THE CURRICULUM

INNOVATION	ENGAGEMENT	IMPACT
Experiential/High Impact Course Revision: H. Parker required students in the Sport Management Seminar (SP 2018 & 2019) to create an original Super Bowl commercial.	Required students to read research on what makes a successful Super Bowl commercial as well as plan a marketing strategy for the commercial.	Students gained basic proficiency in a video editing software.
Experiential/High Impact Course Revision: H. Parker introduced “career readiness” unit in Sport Marketing	The unit included participating in mock interviews, attending a job fair, volunteering at a sporting event, and creating portfolios with resumes and cover letters vetted by the Career Hub.	
Collaborations/Experiential Learning: R. Bilodeau collaborated with Prof Jamie Picardy in the Food Studies Program to develop a course project involving food waste assessment at USM.	Students in Triple Bottom Line Business analyzed food waste at USM meetings and conferences, and developed a plan to reduce it by 50%.	Students presented their findings and recommendations to campus food provider Sodexo, which then catered the event following recommended practices.
Competition: A. Kohli, Zhenning Xu, Patricia Griffin, and other faculty from the School of Business received \$1000 High Impact Practices mini-grants in Spring 2017, 2018, and 2019 to organize the annual Business Analytics and Digital Marketing Competition and Workshop.	Collaborated with VONT, a full-service digital agency and WEX, a global provider of payment processing and information management services. In 2018, 6 teams competed: 2 teams in the analytics track are given the same business problem, data sets, and access to software to solve a challenging problem using an analytics approach. Beginning in January, 4 teams in the digital marketing track designed, implemented, and monitored an integrated digital campaign for a small business client.	Working with the QC2 lab at USM, the winning digital marketing team generated more than 50,000 impressions, hundreds of clicks, and two conversions.

GOAL 2 – IMPROVE STUDENT SUCCESS AND RETENTION

INNOVATION	ENGAGEMENT	IMPACT
Student Research and Awards:	D. Tharp led an independent study. Student applied theories of behavioral finance to the selection of insurance in the Healthcare.gov marketplace.	The finance student’s work received second prize in the undergraduate research competition sponsored by the American Council on Consumer Interests . The competition is funded and evaluated by the FINRA Investor Education Foundation.
	R. Bilodeau received MEIF grant to study the feasibility of business certificate program for fisheries in Maine.	Grant research is underway with two undergrad student research assistants.
	J. Voyer and student Tristan Jordan wrote “A Veterinary Telemedicine Case Study.”	Case was published in <i>Systems</i> (online, 2018).

GOAL 2 – IMPROVE STUDENT SUCCESS AND RETENTION

INNOVATION	ENGAGEMENT	IMPACT
	David Stone (BS Accounting and Economics, 2017) received the AICPA’s Elijah Watts Award . Winners must have a cumulative average above 95.5 across all four sections of the Uniform CPA Examination, pass all four sections on their first attempt and have completed testing in 2018.	Of the 86,000 who sat for the CPA exam in 2018, only 110 met the criteria for the award.
CPA Exams: In 2017, 60% of USM Accounting majors passed the CPA exam on their first attempt; 66.7% passed on their first attempt within a year.		This is 9.2 percentage points above the national average and the highest pass rate of the four colleges and universities in Maine with students sitting for the exam. ²
Job Placement: D. Kerr assists RMI students with getting jobs in the field and tracks placement.	He brought 6 undergraduate RMI students to the International Risk & Insurance Management Society conference in April 2019 in Boston.	88% of USM Risk Management students find jobs in the Risk and Insurance industry after graduation.
R. Bilodeau serves as member of Faculty Advisory Group for Ci2 Lab .	Bilodeau works to develop innovative program experiences in USM's student creativity lab.	250 students are involved in the Ci2 lab.
Peer Tutoring: J. Kuenz worked with Learning Commons to revise and expand access to peer tutors for Business courses. Tutors moved to central location. Instituted new plan for identifying qualified tutors.		Peer tutors receive formal training and general elective credit in addition to compensation.
Advising: R. Bilodeau developed and led an advising workshop for new faculty.		Training has made new faculty more comfortable working with students from the beginning.
Advising: Worked with professional advisors to revise advising forms and tools to develop new policies and expectations for the smooth transition of students between the 2 nd and 3 rd year.	Monthly meetings have contributed to stronger relations with professional advisors	In the 2018 Advising Survey, 73% of School of Business majors report they are “Very satisfied/satisfied with the accessibility of faculty in the major, inside or outside of class.”
Advising: J. Li serves on the subcommittee of Technology-Enabled Advising.	Supports the Excellence in Academic Advising initiative to pursue an evidence-based redesign process for creating and implementing a comprehensive strategic plan for academic advising.	USM is one of only 12 participating institutions nationwide and the only school from Maine.

² National Association of State Boards of Accountancy, 2017 Uniform CPA Exam: Candidate Performance.

GOAL 2 – IMPROVE STUDENT SUCCESS AND RETENTION

INNOVATION	ENGAGEMENT	IMPACT
<u>Internship Program:</u>	An average of 109 USM Business students participate in internships every year, 86% of which are paid. So far in 2019, 35 Business students have completed internships for a total of 126 credit hours at 24 different sites. 6 out of 10 of those 25 employers hired more than one USM student.	
H. Parker serves on the UMS Micro Credentialing Task Force and leads efforts to implement Microsoft Excel Certification and Certiport Testing on campus.	Established certiport testing site and test preparation for required Microsoft Excel certification.	Requiring certification will improve students' facility with Excel and success in other courses.
Student Group: Gamma Iota Sigma	D. Kerr organized and was granted approval for a USM chapter (Beta Sigma chapter) of the Gamma Iota Sigma actuarial science, risk management, and insurance fraternity. Dr. Kerr is the faculty advisor.	15 students
Student Group: Student Marketing Association (Z. Xu advisor)	In fall 2018, the Student Marketing Association secured the official American Marketing Association Chapter accreditation status.	Group meets weekly with the goal of partnering with local business, developing skills partly by volunteering for marketing events within USM, and attending regional and national conferences.
Student Group: Accounting Society (L. Dunbar and D. Ladd advisors)	The Accounting Society held meetings twice per month with guest speakers and started off the recruiting season with a panel of former students discussing the recruiting process. The Society worked with the Maine Society of CPAs on a panel discussion for students and invited presenters to discuss the CMA exam. A former KPMG Audit Partner also discussed his experiences with the group and two CPA review publishers come in to speak about the CPA exam.	Increased membership this year and will invite Finance majors to join in the Fall to increase both membership and exposure to different presenters.
Student Group: ENACTUS. J. Voyer was Sam Walton Fellow for the ENACTUS team, 2014 – 2017; R. Bilodeau took over as advisor in 2017 – present.	In Spring 2017, ENACTUS students developed a plan to reduce glass waste at Allagash Brewing. Plan delivered to the company for feasibility analysis.	Student plan would reduce Allagash glass waste by 40% per year. The USM Enactus team competed in the Enactus United States Regional Competition in Washington DC.
	In Spring 2018, students worked with Maine Homeless Veteran's Alliance to develop marketing and outreach program.	Students collected and delivered 300 pounds of clothes to the homeless in Greater Portland. Students deployed new social media presence

GOAL 2 – IMPROVE STUDENT SUCCESS AND RETENTION

INNOVATION	ENGAGEMENT	IMPACT
		for organization. Students assisted 17 homeless veterans in finding housing.
	In Fall 2018, students worked on the issue of hunger on campus.	Students raise \$300 for local food bank, collect over 100 pounds of food, and assist in cooking meals for 125 people.
Student Group: Beta Sigma Gamma	Qualifying graduates in the School of Business inducted every spring at the School of Business Recognition Day.	
Study Abroad: Developed new travel courses to Iceland, Montreal, and the Netherlands.	Since 2014, 63 undergraduate students have traveled and studied abroad in Canada, Austria, Ireland, Scotland, France, Italy, England, Brazil, Indonesia, Iceland, and the Netherlands. This summer, another trip to Reykjavik is planned in conjunction with USM’s Honors Program. 11 students have already enrolled.	<p>Students analyze and understand international leadership, management, and marketing operations through hands-on experience interacting with different people and organizations abroad.</p> <p>Students visited businesses in both consumer and business-to-business market sectors in Netherlands in Amsterdam, Rotterdam, and Groningen.</p> <p>In the Canada course, students attended Montreal Startup Fest, and met with seven startups in Quebec to learn about their launch.</p> <p>Sport Management students traveled to Brazil to study managing international events.</p>

GOAL 3 – ENHANCE FACULTY GROWTH AND DEVELOPMENT

INNOVATION	ENGAGEMENT	IMPACT
Over the last five years, 75% of School of Business participating faculty produced significant, mission-focused intellectual contributions that impact the theory, practice, and teaching of business.	<p>117 total intellectual contributions</p> <p>22 peer-reviewed articles, 19 more editorially-reviewed articles, and 4 case studies</p> <p>31 conference presentations and 5 more conference proceedings</p>	<ul style="list-style-type: none"> • 5.8% of ICs were linked to Goal 1 – Innovate the Curriculum. • 10.5% of ICs were linked to Goal 2 – Student Success & Retention • 57% of ICs were linked to Goal 3 – Enhance Faculty Development and Growth • 23.3% were linked to Goal 4 – Establish & Grow Collaborations & Partnerships

GOAL 3 – ENHANCE FACULTY GROWTH AND DEVELOPMENT

INNOVATION	ENGAGEMENT	IMPACT
School of Business faculty revised criteria for faculty qualifications for AACSB SA classification to require a minimum of either one A or A* peer reviewed articles or two or more B or C articles in each 5-year review period.		Faculty commitment to greater research productivity will raise the School’s profile. Mission-related research especially, whether discovery, applied, or teaching, will benefit students and learning.
D. Kerr worked with USM Foundation to create \$3 million John T. Leonard/MEMIC Endowed Chair in Risk Management and Insurance (2017).		The named professor will mentor junior faculty, engage w/ the business community and foster its connection with students.
S. Hansen wrote a paper on the reporting relationships between special purpose governments and their supervising governments.	The paper was sent to the US Government Accounting Standards Board to provide information about how to improve regulatory standards.	The Government Accounting Standards Board may use the paper when they revise standards.
S. Hansen wrote a paper on how the government should downsize the military commissaries.		The approach informed the Defense Commissary Association about their options in downsizing the commissaries.
Faculty Research Awards:	D. Kerr published a paper concerning the bias in the insurance claims reporting process.	The paper was selected as the best journal article of the year for the <i>Journal of Insurance Issues</i> .
	John Voyer presented “A Veterinary Telemedicine Case Study” at the 35th International Conference of the System Dynamics Society, Cambridge, Massachusetts, July 2017.	This was judged Best Poster at the conference.
	D. Tharp received the CFP Board’s ACCI Financial Planning Paper Award .	Established in 2000, the award is for scholarly papers focused on important financial planning issues and presenting information or ideas useful to consumers, professionals, and policymakers.
	S. Hansen won second place in the 2015 IMA Educational Case Journal Case Competition for “Hula Island: Strategic Decisions Involving Costs and Benefits of Internet Advertising Programs.”	
	S. Hansen won the Management Accounting Section of the American Accounting Association’s 2014 Impact on Management Accounting Practice Award for “Evaluating	

GOAL 3 – ENHANCE FACULTY GROWTH AND DEVELOPMENT

INNOVATION	ENGAGEMENT	IMPACT
	Heuristics Used When Designing Product Costing Systems.”	
Funded Grants:	<ol style="list-style-type: none"> 1. R. Heiser was awarded an MEIF grant to develop a relationship with Reykjavik University’s Business programs. 2. Heiser, Bob, Bilodeau, Richard, "North Atlantic Initiatives with the Ocean Clusters & USM MBA program," Sponsored by Maine Economic Improvement Fund/Cutler Institute, University of Southern Maine, \$53,195.00. 3. Suleiman, James (Supporting), "UMA - Undergraduate Data Science System Initiative Grant," Sponsored by UMS, State, \$155,000.00 4. Suleiman, James (Principal), "MS In Data Science Strategic Initiative Grant," Sponsored by UMS, State, \$40,000.00 5. Takeda, Hirotohi (Principal), Corbett, Jacqueline (Co-Principal), "Insight Development Grant," Sponsored by Social Sciences and Humanities Research Council, Government of Canada, Federal, \$58,170.00. (September 2017 - August 2019). 	77 MBA students travelled to Reykjavik University and competed in North Atlantic Entrepreneurs
Faculty Research Grants:	<ol style="list-style-type: none"> 1. H. Parker received a \$3000 University of Southern Maine Faculty Senate Grant for Scholarship. 2. Zhenning Xu and Bob Heiser from School of Business received \$3000 Faculty Senate Research Grant for Scholarship to conduct social network analysis of consumer sugar habits. (2017-2019) 3. LI, JIE (Principal), "Faculty Senate Research Grant," University of Southern Maine, \$3,000.00. (May 2019 - May 31, 2020) 4. Li, Jie (Principal), "Summer Research Grant," Sponsored by University of Michigan-Flint, \$8,000.00. (July 2016 - August 2016). 	
Title III High Impact Teaching Grants:	<ol style="list-style-type: none"> 1. Kohli, Amarpreet (Co-Principal), Xu, Zhenning, Heiser, Bob, Suleiman, James, "Title III Grant - 2nd Business Analytics and Digital Marketing Summit & 	

GOAL 3 – ENHANCE FACULTY GROWTH AND DEVELOPMENT

INNOVATION	ENGAGEMENT	IMPACT
	<p>Student Competition," University of Southern Maine, \$1,000.00. (2017, 2018).</p> <p>2. Heiser, Bob (Co-Principal), Xu, Zhenning (Co-Principal), Takeda, Hirotooshi (Co-Principal), Kohli, Amarpreet (Co-Principal), "the Business Analytics & Digital Marketing Research Summit," Sponsored by USM Title III Mini-grant, University of Southern Maine, \$1,000.00. (January 2019 - May 2019).</p> <p>3. H. Parker, 2017 Title III Program Grant supporting student registration at a Red Sox Career/Networking Fair. \$1000.</p> <p>4. H. Parker, 2016 Title III Course Grant for leadership and team building activities in Bus 316</p>	
<p>CTEL Online Teaching Grants and Certificates:</p>	<p>1. Kohli, Amarpreet (Principal), "USM Community of Practice CTEL Grant," Sponsored by CTEL, USM, University of Southern Maine, \$1,000.00. (2018 - August 2018</p> <p>2. H. Parker. 2015 Online Learning Consortium Online Teaching Certificate</p> <p>3. E. Newell, 2019 Universal Design Learning Workshop.</p> <p>4. Z. Xu, Course Development Grant, 2018, 2019</p>	
<p>School of Business faculty led campus-wide discussions of pedagogy, research, and leadership.</p>	<p>1. Zhenning Xu co-directed the first-ever Faculty Interest Group in technology and analytics at USM in spring 2019</p> <p>2. R. Bilodeau led a Faculty Interest Group exploring creative thinking in the classroom.</p> <p>3. R. Bilodeau presented the Leading for Creativity and Innovation workshop at Hussey Leadership Institute in Spring 2018.</p> <p>4. R. Bilodeau developed and deployed entrepreneurial training program for MEIF grant recipients.</p>	<p>58 faculty attended workshop series on techniques for boosting creativity in the classroom.</p> <p>22 USM Faculty and Staff representing 8 grant programs learned about ways to expand and</p>

GOAL 3 – ENHANCE FACULTY GROWTH AND DEVELOPMENT

INNOVATION	ENGAGEMENT	IMPACT
		develop their work towards a goal of commercialization.
School faculty lead on diversity:	<ol style="list-style-type: none"> 1. All School of Business faculty engaged in Title IX and bias training as preparation for faculty searches. 2. Since 2015, A. Kohli has served on multiple college and university diversity initiatives and committees, including the CMHS Diversity Committee (2012-2015), the USM Diversity Council (Spring 2016 – Fall 2017), and the Intercultural & Diversity Advisory Council (2018 – present). He is also a member of IDAC’s Hiring & Human Relations Sub Committee (2017 – Present). 3. Emily Newell serves on the Diversity Committee, North American Society for Sport Management 4. R. Bilodeau delivered a workshop on Diversity and Inclusion to the USM Corporate Partners in Oct 2018. 85 people were in attendance. This workshop included a speaker's panel with four community members and showcased a workplace diversity audit tool that was developed by his students in BUS 347 Triple Bottom Line in Spring 2018. 	<p>4 of 9 new faculty hires were from diverse backgrounds.</p> <p>As of Feb 2019, nine businesses have used the diversity audit in the workplace. Six follow-up meetings held with businesses to discuss the importance of diversity in the workplace.</p>
Faculty Development:	<ol style="list-style-type: none"> 1. Z. Xu attended the Virginia Master Teaching Program at Hampden-Sydney College. 2. J. Lie and H. Takeda attended AACSB’s Innovation, Engagement, and Impact Seminar in October, 2018. 3. E Newell attended AACSB’s AoL Seminar in Tampa in 2018. 4. R. Bilodeau completed USM's Online Course Development Program and UMaine's Gold Program. 5. Z. Xu was awarded a \$500 CCD Gap Funding Mini-Grant for Digital Marketing Certified Associate Training 	<p>New expertise informed IEI Committee’s work on developing impact indicators and measures.</p> <p>Prepares for transition from retiring leadership (J Voyer) and addition of new faculty.</p> <p>Online sections of BUS347: Triple Bottom Line Business overhauled to reflect best practices.</p>

GOAL 3 – ENHANCE FACULTY GROWTH AND DEVELOPMENT

INNOVATION	ENGAGEMENT	IMPACT
<p>Academic Editorial Boards:</p>	<ol style="list-style-type: none"> 1. <i>Journal of Marketing Education</i> 2. <i>Journal of Global Business Advancement</i> 3. <i>Journal of Organizational Behavior</i> 4. <i>Sports Marketing Quarterly</i> 5. <i>International Journal of Information Systems and Supply Chain Management</i> 6. <i>International Journal of Business Intelligence and Systems Engineering</i> 7. <i>Global Business Digital Association</i> 8. <i>Problems and Perspectives in Management</i> 	
<p>Ad Hoc Journal Reviewing:</p>	<ol style="list-style-type: none"> 1. <i>Journal of Marketing Education</i> 2. <i>Industrial Marketing Management</i> 3. <i>Journal of Marketing Theory and Practice</i> 4. <i>International Journal of Conflict Management</i> 5. <i>Journal of Organizational Behavior</i> 6. <i>Management Organization Review</i> 7. <i>Industrial and Organizational Psychology</i> 8. <i>Business Law Review</i> 9. <i>International Journal of Information Systems and Supply Chain Management</i> 10. <i>International Journal of Production Research</i> 11. <i>Applied Computing and Informatics Journal</i> 12. <i>MIS Quarterly</i> 13. <i>Journal of Global Information Technology</i> 14. <i>Management</i> 15. <i>European Journal of Information Systems</i> 16. <i>Information Systems Journal</i> 17. <i>Information Systems Research</i> 18. <i>Sports Marketing Quarterly</i> 19. <i>Journal of Sport Management</i> 20. <i>Journal of Issues in Intercollegiate Athletics</i> 21. <i>International Journal of Sport Communication</i> 22. <i>Journal of Real Estate Literature</i> 23. <i>Journal of Family and Economic Issues</i> 24. <i>Journal of Financial Counseling and Planning</i> 25. <i>Asia-Pacific Journal of Accounting and Economics</i> 26. <i>Accounting, Organizations, and Society</i> 27. <i>The Accounting Review</i> 	

GOAL 3 – ENHANCE FACULTY GROWTH AND DEVELOPMENT

INNOVATION	ENGAGEMENT	IMPACT
	28. <i>Accounting Horizons</i>	
Ad Hoc Journal Reviewing, cont.	29. <i>Contemporary Accounting Research</i> 30. <i>Journal of Management Accounting Research</i> 31. <i>European Accounting Review</i> 32. <i>Management Accounting Research</i>	
Conference Organizing or Paper Review:	<ol style="list-style-type: none"> 1. R. Heiser, Conference Program Director, Institute for Behavioral and Applied Management (IBAM) conference, 2018-2020 2. R. Heiser, Board of Directors, Institute for Behavioral and Applied Management, 2018. 3. R. Heiser, Reviewer American Marketing Association, Summer and Winter Academic Conferences, 2014-2019 4. Z. Xu, Program Committee and the International Advisory Committee, SEBD 2017 and 2018 IEEE International Workshop on Software Engineering and Big Data 5. Z. Xu, reviewed papers for the American Marketing Association’s summer conference 6. H. Takeda, committee member for the JPAIS 2018 meeting in San Francisco Dec. 2018 and for the 2019 AMCIS conference mini-track on meta IS research. 	

GOAL 3 – ENHANCE FACULTY GROWTH AND DEVELOPMENT

INNOVATION	ENGAGEMENT	IMPACT
	<p>7. H. Takeda is a committee member for the 2019 AMCIS conference mini-track on meta IS research. Work concluded includes application submission and selection. Currently papers are being submitted. Future work will include arranging reviews and chairing the mini-track.</p>	
	<p>8. G. Palin was Co-Chair, US Association for Small Business Education Developmental Papers Committee. (September 2016 – January 2017).</p>	
	<p>9. P. Griffin is a reviewer for Society for Industrial and Organizational Psychology</p>	
	<p>10. J. Voyer reviewed papers for the International System Dynamics Conference, 2014-2018; the Business Policy and Strategy Division of the Academy of Management in 2014 and 2018</p>	
	<p>11. J. Lie, reviewed papers for the Academy of Management</p>	
	<p>12. J. Suleiman, Eastern Academy of Management and Americas Conference on IS (AMCIS)</p>	
<p>Blogging and Media Interviews:</p>	<p>D. Tharp wrote 10 blog posts since February 2017 on <i>Wall Street Journal's</i> Wealth Management Experts Blog and another 32 posts on the “Nerd’s Eye View blog on Kitces.com.</p>	<p>He has had 16 media hits since 2014, including the <i>Wall Street Journal</i>, <i>Money</i>, <i>Forbes</i>, <i>U.S. News & World Report</i>, <i>New York Times</i>, <i>USA Today</i>, <i>Kiplinger’s Personal Finance</i>, <i>Investment News</i>, <i>New York Times</i>, and <i>Money Matters Podcast</i>.</p>
	<p>D. Tharp wrote a blog post for the Wall Street Journal's Experts Blog on the problems with using cost of living calculators to compare cost of living between cities (November 2018).</p>	
	<p>D. Tharp wrote a blog post for Kitces.com (an industry blog for financial advisors) on the application of evolutionary psychology to financial decision making (January 2019)</p>	

GOAL 3 – ENHANCE FACULTY GROWTH AND DEVELOPMENT

INNOVATION	ENGAGEMENT	IMPACT
	Pat Griffin was interviewed April 2017 by WGME's Adrienne Stein, Channel 6 regarding the pros and cons of multi-level marketing.	
	J. DiBartolomeo (Nov, 2018), WGME News 13 on credit card usage and the level of credit card debt in Maine.	Video interview appeared on the Thanksgiving Day broadcast ahead of Black Friday.
	R. Bilodeau interviewed by tv station WGME in Feb 2019 about the rise of dollar stores in Maine and the economic impact.	Segment yielded one interview on television, and two subsequent interviews online
	Dana Kerr responded to media request from WalletHub.com for information about auto insurance rates in the state of Maine.	
	H. Parker discussed the treatment and equity of women in sports guest on the show <i>All Things Bike with Fred Thomas</i> . (Fall 2018)	
	Zhenning Xu was interviewed by Introspective System (a Portland, Maine based business intelligence company) on marketing technology and innovations in Nov 2018.	The newsletter was published on the company website and was delivered to more than 200 local business partners.
	<p>H. Smoluk was a guest on Maine Public Broadcasting Network discussing market volatility, December 31, 2015. He has been quoted or interviewed regularly:</p> <ul style="list-style-type: none"> • Interviewed by Channel 6 about Bitcoin, December 14, 2017 • Quoted in <i>Portland Press Herald</i>, Maine Investors, November 27, 2015 • Interview by Channel 8, about Millennial Savers, September 11, 2014 • Quoted in <i>The Sun Journal</i>, about Verso Bankruptcy, September 25, 2015. 	

GOAL 4 – ESTABLISH & GROW PARTNERSHIPS AND COLLABORATIONS

INNOVATION	ENGAGEMENT	IMPACT
Business Advisory Board: Faculty revised the Advisory Board Charter and recommended new members.	In Fall, 2018, a new Board was seated and new leadership selected.	Board has already contributed valuable feedback on the new mission, curriculum, and strategic plan.

GOAL 4 – ESTABLISH & GROW PARTNERSHIPS AND COLLABORATIONS

INNOVATION	ENGAGEMENT	IMPACT
<p>Partnership with Reykjavik University: R. Bilodeau received a grant from MEIF to develop an innovative summer program called Leading for Creativity and Innovation.</p>	<p>This 10-day intensive course will allow USM students to work closely with students and faculty at Reykjavik University using collaborative learning models.</p>	<p>R. Bilodeau and H. Parker will pilot the program on site at Reykjavik University in Summer 2019.</p>
<p>New England Ocean Cluster: Each spring since 2015, students in B. Heiser’s MBA 698 Practicum & Consulting work with Patrick Arnold and the New England Ocean Cluster on waterfront projects.</p>	<p>Students work with NEOC clients to develop new ideas, products for new markets and projects that are "stuck," etc. Perhaps the most prominent and important work our MBA teams recently accomplished was the economic and market analysis of the soon-to-be built Americold cold storage facility on the waterfront. USM MBA generated data was presented at the Portland City Council permitting meetings and it was also used by the client as part of their economic analysis and justification to build the plant. Our teams have contributed to dozens of other projects and businesses throughout Southern Maine.</p>	<p>In 2018, students launched new seafood products, (Bristol Seafood and others), mapped lobster waste streams as feedstock for chitosan processing, investigated distribution channels for the new Portland->Greenland shipping lane, and investigating EcoTourism trends and recommending pathways to develop Maine's Eco-Tourism business.</p>
<p>Dalian University of Finance and Economics. Began discussions for student and faculty exchanges with Dalian University of Finance and Economics in China.</p>		
<p>Accounting Student Networking: The Department of Accounting and Finance and the Maine Society of CPAs hosted a roundtable discussion about the challenges Accounting firms face.</p>	<p>USM faculty met with thirteen representatives from local accounting firms to plan a spring networking event to acquaint students and potential employers ahead of the fall recruiting season.</p>	<p>On April 25, 2019, the Department held a “Careers in Accounting” networking open house for School of Business students and area accounting firms. 40 students attended to learn more about public accounting by networking with representatives from 8 local companies, including 5 different CPA firms, IDEXX, Martin’s Point, and Maine DHHS.</p>
<p>RMI Student Networking: D. Kerr worked with Gamma Iota Sigma Insurance fraternity to organize an insurance industry/student social networking event at least once and sometimes twice each academic year.</p>		<p>12 students and roughly 40 industry representatives attended the event in December 2018. Very positive feedback.</p>
<p>Marketing Student Networking: Z. Xu worked with the Student Marketing Association and the</p>	<p>The event is fully sponsored by Wex. 100 students and representatives from 8 – 10 local companies attended the event.</p>	

GOAL 4 – ESTABLISH & GROW PARTNERSHIPS AND COLLABORATIONS

INNOVATION	ENGAGEMENT	IMPACT
USM Career Services to host the first free Professional Dinner for students at USM.		
Z. Xu began work on a consulting project on big data and cloud computing.	Xu collaborated with data scientists from a cloud computing vendor based in Shanghai and researchers from the Shanghai Business School.	Xu's paper on Big Data analytics appeared in the <i>Journal of Business Research</i> and introduces Big Data to the marketing discipline for the first time. In 2018, he published a book (written in Chinese) with his co-authors from Shanghai Business School on big data analytics and testing. This book has received 1200 views and 109 downloads according to Ryjiaoyu.com .
On April 27, 2016, USM and the Institute of Management Accounting sponsored the 2016 Annual Business & Finance Conference.	IMA awarded 3 scholarships to Accounting students to network with Finance leaders attending the conference. The CMA is an alternative for students working in non-public accounting.	In 2018, 6 new scholarships from IMA were granted to students seeking the Certified Management Accounting credential. The scholarship covers exam fees, exam prep, and membership fees for three years.
USM/UMS Partnerships: D. Kerr assisted USM's Math Department in creating an interdisciplinary Actuarial Science Minor.		
USM/UMS Partnerships: B. Heiser, Z. Xu and others worked on Maine Center Ventures stakeholder panels to help design and coordinate the launch of the new UM Graduate Center.		

GOAL 4 – ESTABLISH & GROW PARTNERSHIPS AND COLLABORATIONS

INNOVATION	ENGAGEMENT	IMPACT
<p>Student Engagement with Business Partners:</p>	<p>Since 2014, students in MBA 672 Supply Chain Management have worked with the following companies:</p> <ul style="list-style-type: none"> • Analyzing Supply Chain Processes, Bitsbox, Colorado, Denver • Inventory Forecasting and Safety Stock Analysis, SIGCO, Westbrook, Maine • Process Analysis at Edgecomb Pottery, Edgecomb, Maine • Inventory Policies for Flight Deck Brewing, Brunswick, Maine • Network planning: creating a nationwide field repair program sparing plan, Essential enterprise solutions, Mechanicsburg, PA • Smart Pricing of the Golf Department, Play it again sports, Portland, Maine • Analysis of L.L.Bean’s Supply Chain Strategies, L.L.Bean, Freeport, Maine 	
	<p>Students in the BUS 450 Business Policy & Strategy Capstone course used strategy dynamics to analyze two nonprofits, the Animal Refuge League of Greater Portland and Portland Downtown.</p>	
	<p>Zhenning Xu took a group of digital marketing students to visit Planet Dog in fall 2017.</p>	
	<p>Students in Entrepreneurship and Venture Creation served as panelists on Maine Startup and Create Week’s House of Genius program Entrepreneurs pitched ideas on innovation and problem solving to an anonymous panel.</p>	<p>Student was nominated to attend Maine Startup and Create Week receive a scholarship to attend for free.</p>
<p>Guest Speaker: BUS 335 International Business</p>	<p>Students in BUS 335 International Business met with representatives from the Maine International Trade Center and the SVP of International Business for People's United Bank to discuss exchange rates.</p>	<p>Students learn about excellent secondary market research resources available in Maine.</p>

GOAL 4 – ESTABLISH & GROW PARTNERSHIPS AND COLLABORATIONS

INNOVATION	ENGAGEMENT	IMPACT
Guest Speaker: Guest speakers from Maine's entrepreneurial ecosystem into BUS 385: Entrepreneurship & Venture Creation every semester.	Speakers interact with students and assist in evaluating the potential of student business ideas.	Over the past nine semesters, over 200 students have met and engaged with over 20 members of the local ecosystem, learning about funding and support services.
Guest Speaker: ACC 405 Cost Accounting	On April 10, 2018, two Financial Analysts from IDEXX presented to students in Cost Accounting and discussed topics directly related to issues in cost accounting covered in class.	The presentation provided a great opportunity for students to see firsthand how theory applies to actual manufacturing cost accounting systems.
Guest Speaker: RMI courses	Dana Kerr regularly makes time for insurance industry professionals to speak to RMI classes about the industry and the related opportunities.	
Board Memberships:	1. D. Kerr, Starboard Advisors, LLC	One board meeting has taken place so far in July 2018. Dr. Kerr presented on an academic topic at this inaugural annual meeting.
	2. H. Parker serves on the Board of Directors of the National Association for Girls and Women in Sports.	
	3. J. Voyer, Advisory Board, Memory-Lane.tv, 2016-2019	
	4. J. Voyer, Board of Directors, Community Financial Literacy	
	5. H. Smoluk, CFA Society of Maine, 2015-2019	Promotes high standards in investment management.
	6. J. Sanders, Board of Directors, Association of Certified Fraud Examiners	
	7. R. Bilodeau, Board Member, local non-profit Maine Can Do	Maine Can Do has developed sexual harassment training tools for startups, individuals, and investors in the wake of MeToo movement.
	8. D. Ladd, Treasurer, Maine Farm and Sea Cooperative	The cooperative fosters the production and sales of Maine sourced foods to the customer.
	9. D. Ladd, Member, Southern Maine Chapter of the IMA.	The IMA provides educational opportunities for members to maintain their CMA certification

GOAL 4 – ESTABLISH & GROW PARTNERSHIPS AND COLLABORATIONS

INNOVATION	ENGAGEMENT	IMPACT
		and stay up to date on changes in accounting practices.
	10. D. Ladd serves on the President’s Budget Advisory Committee.	Committee members are kept apprised of and advise the President pm the current budget status for the University
	11. B. Belik, President & Treasurer, Kennebunkport Consolidated School Parent Teacher Association (2012-2017)	
	12. B. Belik, Member, York County Committee of the Maine Community Foundation (2012-present)	
	13. B. Belik, Member, Eligibility Review Subcommittee, United Way of York County (2016-present)	
	14. B. Belik, Trustee, Louis T. Graves Memorial Library	
	15. C. Benoit-Norris, Steering Committee Member (elected), Sustainable Apparel Coalition	
	16. C. Benoit-Norris, Strategic Advisory Board, Sustainable Purchasing Leadership Council	
	17. C. Benoit-Norris, Partner, UN International Trade Center	
	18. P. Griffin, Finance Committee, Town of Old Orchard Beach	
	19. R. Heiser, Branding Advisory Board, Portland Ovations	
Public Engagement: Z. Xu is one of the founding members of the Portland Maine R Meet-up group. In January 2019, he introduced the Meet-up group to the USM community.	Xu co-hosts current and future R meet-up sessions at USM.	Around 15 to 20 data scientists and analysts meet each time for contemporary data science techniques and programming applications.
Public Engagement: Dana Kerr presented work-in-progress research to local professional insurance group.		
Public Engagement: Gary Palin presented to University of Southern Maine Corporate Partners,		

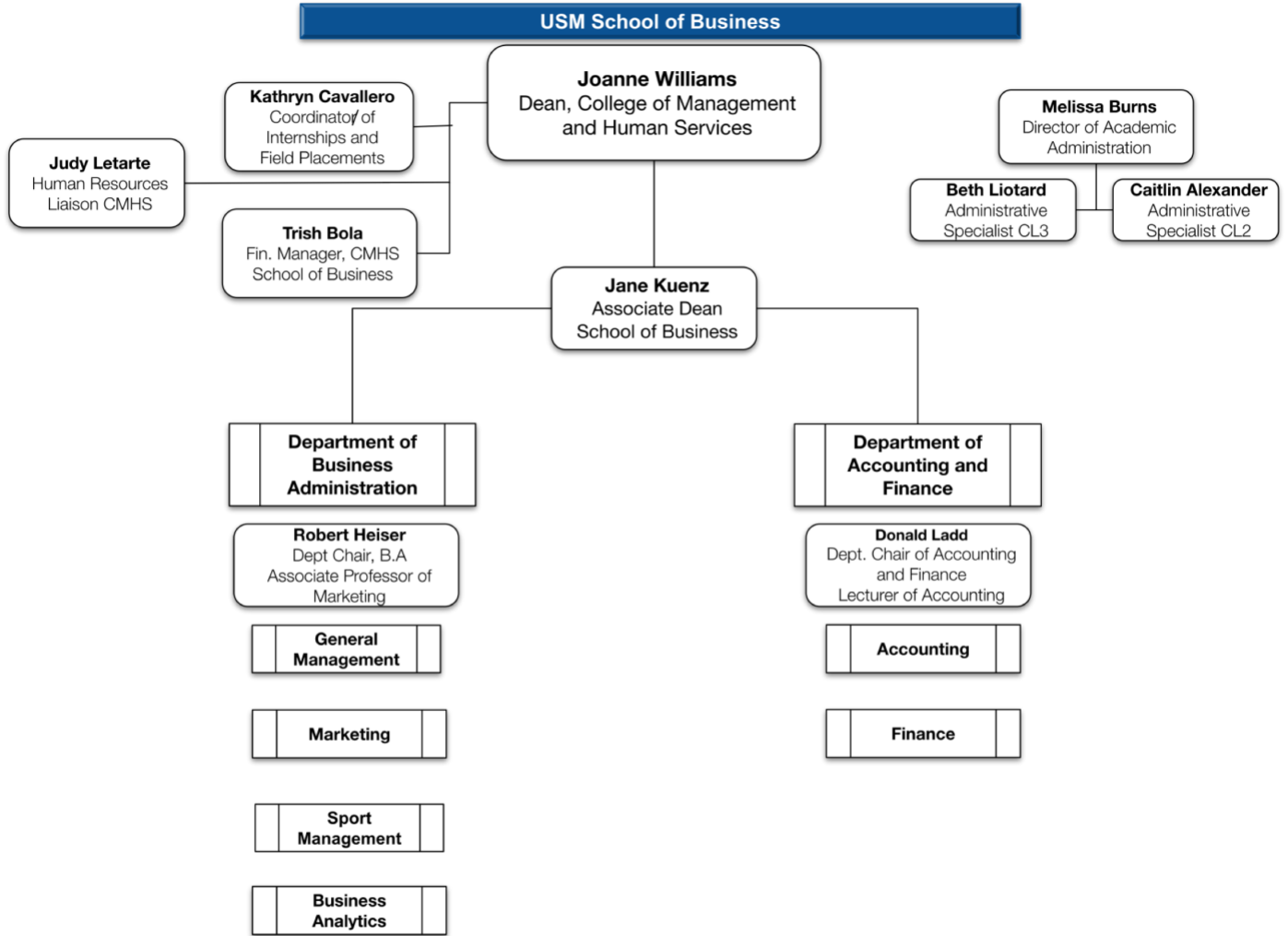
GOAL 4 – ESTABLISH & GROW PARTNERSHIPS AND COLLABORATIONS

INNOVATION	ENGAGEMENT	IMPACT
<p>“University of the Future: Transforming Higher Education,” Portland, ME. (January 25, 2018).</p>		
<p>Public Engagement: Gary Palin moderated Social Entrepreneurship and Education Consortium Debate, Is Social Media Worth the Time and Effort for a Startup Entrepreneur, Portland, ME</p>		
<p>Public Engagement: Richard Bilodeau delivered a workshop to USM Corporate Partners on the importance of sustainability to business in Jan 2019.</p>	<p>The workshop included a speakers’ panel (Hannaford, Manomet, and USM student) and featured a sustainability auditing tool.</p>	<p>Highlighted USM's internship program. At least five companies have reached out to Manomet to participate in sustainability audit program. Manomet has contacted USM for additional interns to support this work.</p>
<p>Public Engagement: Bilodeau presented a workshop on thinking wrong at Maine Startup and Create Week in June 2017.</p>		<p>Bilodeau presented a workshop on thinking wrong at Maine Startup and Create Week in June 2017.</p>
<p>Public Engagement: Jie Li presented a paper at the School of Business Advisory Board Meeting in September 2018.</p>		
<p>Public Engagement: Bilodeau presented a workshop to 30 attendees on thinking wrong at Maine Startup and Create Week in June 2017.</p>		
<p>Public Engagement: R. Bilodeau and Matthew Hoffman (Food Studies) hosted four business community gatherings for food entrepreneurs in Fall 2018 following the Community Table model developed at Babson College.</p>	<p>Group discussed 11 important topics to the local food economy ranging from tourism to environmental impact to brand strategy.</p>	<p>Importantly, group helped connect at least seven businesses thru networking.</p>
<p>Consulting:</p>	<p>1. J. Voyer provided Strategic Planning Consultation for the nonprofit Spirits Alive, April, 2016.</p>	
	<p>2. D. Kerr assisted officials at Thornton Academy with interpretations of their health insurance plan options, 2016.</p>	
	<p>3. J. Sanders, Certified Business Counselor, Maine Small Business Development Center</p>	
	<p>4. D. Ladd, Boys and Girls Club of Southern Maine. (August 2, 2019 - November 15, 2019).</p>	

GOAL 4 – ESTABLISH & GROW PARTNERSHIPS AND COLLABORATIONS

INNOVATION	ENGAGEMENT	IMPACT
	5. In February and March 2018, D. Ladd assisted Josh Keefe, a reporter with the Bangor Daily News.	Analyzed the 990 tax returns for the advocacy group, Maine People before Politics.
	6. D. Ladd, Tedford Housing, Brunswick, Maine. (June 2012 - August 2015)	
	7. R. Bilodeau was a consultant for 12 clients.	

APPENDIX 8: USM SCHOOL OF BUSINESS ORGANIZATIONAL CHART



APPENDIX 9: USM SCHOOL OF BUSINESS ADVISORY BOARD

Last Name	First Name	Organization	Position
Cameron	Chris	Portland Sea Dogs	VP of Communications
Chong	Tae	CEI /StartSmart Program	Business Advisor
De Oliveira	Ed	IDEXX	Talent Acquisition Manager
Gauthier (Howe)	Linsday	UNUM	AVP Operational Effectiveness
Getchell	Sean	General Manager	OOB Surge
Hancock	Kevin	Hancock Lumber	Owner
Martin	Michelle	LL Bean	Senior Manager, Customer Satisfaction
O'Shea	Frank	Berry Dunn Services	Principal, CPA, ABV, CVA
Peters	Betsy	230Trees	Advisor & Impact Strategist
Purvis	Eric	Dawson, Smith, Purvis & Bassett	Principal, CPA/ABV, MST, CVA
Stitham	Stacy	Brann & Isaacson	Partner
Venezuela	Matt	Bristol Seafoods	Director of Operations
Wurpel	Heidi	IDEXX	Senior IT Manager
Veroneau	Vincent	J B Brown & Sons	President & CEO
Kuenz	Jane	USM	Associate Dean, School of Business
Griffin	Nancy	USM	VP of Enrollment Management
Cochrane	Paul	USM	Director of Technology Enhanced Learning
Heiser	Bob	USM	Faculty Chair, Business Management
Ladd	Don	USM	Faculty Chair, Accounting & Finance
Clark	Adam	USM Student	Marketing/Bus Mfgt/Enactus member
Howe	Ashley	USM Student	BusMngt/Marketing/Enactus member
Phillips	Bryanna	USM Student	ACC/SMBus/Entrep/Scholarship Recipient
Etsy	Nicholas	USM Student	FIN/RMI/Scholarship Recipient

APPENDIX 10: FACULTY RESEARCH PROFILES

ACCOUNTING

The Accounting faculty have published articles in three broad categories. They have published academic articles in the Journal of Management Accounting Research (A, section journal for the American Accounting Association) and Journal of Public Procurement (C, specializing in government procurement). The second category are two cases, both published in the International Educational Case Journal (C, journal for the Institute of Management Accounting). Finally, they have published two practitioner articles in the CPA Journal (C, Society of New York CPAs) and Today's CPA (C, Society of Texas CPAs).

BUSINESS ANALYTICS

Prof. Suleiman enjoys publishing research that directly informs his teaching and comes directly from it. Recent work used in MBA-level MIS classes discusses issues in determining project success using the MLTI (commonly referred to as the Maine Laptop Initiative) as the criterion for analysis. Many of the students have family members who have been involved in the laptop initiative and most are familiar with it. His other area of interest is group support systems, specifically in a distributed or online environment. Understanding group dynamics in an online environment, through research in social loafing, enables a greater level of facilitation in the online portions of my courses.

Prof. Takeda is an active scholar, with a well-established record of high-quality peer-reviewed journal publications. His research focuses on Information Systems research meta-analysis, medical informatics, and supply chain management. Among other things, he is developing a metric to measure the behavior of the uses of an online community.

FINANCE

Professor DiBartolomeo specializes in real estate, specifically investment in real estate investment trusts (REITs) and interdisciplinary research using financial securities analysis to measure urban growth. His research directly impacts teaching in various courses, such as International Financial Management and Financial Modeling. His line of research also contributes to the literature on real estate investment practice and portfolio design.

Professor Smoluk's recent research track focuses on the financial and economic impact of money policy, with an emphasis on using regional (U.S. state) data. His research significantly impacts his teaching in Financial Markets & Institutions, Economic Analysis, Investment Management, Financial Engineering, and Corporate Finance. His research adds to the body of knowledge that regional variation affects the impact of U.S. monetary policy.

Professor Tharp, CFP, earned a PhD in 2017. His research focuses on financial planning, with an emphasis on financial well-being of individuals. His research impacts teaching in financial planning coursework such as Personal Financial Planning and Financial Plan

Development. In addition, his research influences the practice of financial planning among professionals within the industry.

GENERAL MANAGEMENT

Professor Dana Kerr has published discipline-based research in the most-targeted and highly regarded journals in the insurance academic community, such as the *Journal of Applied Risk Management and Insurance*, *Risk Management and Insurance Review* and the *Journal of Insurance Issues*. He has published a variety of research, covering application-based topics and pedagogical issues, along with publications in outlets with broader audiences, such as practitioners throughout the financial services field.

Professor Amarpreet Kohli's research focus is supply chain collaboration and related technological integration. It addresses the broad question of how collaboration among members of supply chain yields lower inventory levels and increased profits across the supply chain. These areas are of growing interest from both the system and global perspectives, and his work is evident from his conference presentations and some of his journal publications in *International Journal of Information Systems and Supply Chain Management*, *Supply Chain Forum: An International Journal* and *Technovation* (which is an "A" Journal as per ABDC).

Professor Jie Li published four peer-reviewed articles over the past five years. These papers appeared in the *European Journal of Work and Organizational Psychology*, *Japanese Psychological Research*, *Journal of Leadership and Organizational Studies*, and *Journal of Managerial Psychology*, with an average 2017 journal impact factor of 1.627. His research provides new angles to explain the complex relational dynamics in the leader-follower dyadic context.

Professor Carter Manny's research on privacy law has been presented, between 2014 and 2019, at annual conferences of the North Atlantic Regional Business Law Association and has been published in *Business Law Review*. Each annual conference averages approximately 50 attendees from New England and beyond. *Business Law Review* is available in print and electronically through EBSCO publishing databases.

Professor John Voyer's research focus is using system dynamics to explore organizational phenomena. Over the past five years, he has published four refereed articles in C journals: The *Journal of Strategic Innovation and Sustainability* (humanitarian logistics), *Systems* (business strategy for veterinary telemedicine), the *International Journal of Emergency Management* (emergency response operations), and the *Review of Financial Economics* (the Protestant Ethic). He presented the humanitarian logistics research at a plenary session of the International System Dynamics Society's 2016 conference. During this period, he also published three case studies in entrepreneurial finance.

MARKETING

The marketing faculty focused their research topics within professional sales, social media, big data analytics and marketing pedagogy. Professor Bob Heiser's research focuses on sales education and training with publications in the *Journal of Marketing*

Education and The Journal of Academy of Business Education. Professor Xu has investigated social media effects in *Qualitative Market Research* and the *Journal of Marketing Theory and Practice*. Dr. Xu has also conducted big data research in *The Journal of Business Research* and *Emerging Markets Finance and Trade*. Patricia Griffin has coauthored manuscripts with Bob Heiser investigating new learning theory in sales education in the *Journal of Academy of Business Education* and conference presentations.

SPORT MANAGEMENT

Professor Emily Newell's research focus is the interdisciplinary nature of intercollegiate athletics, with collaboration among peers in the fields of sport management, business, higher education, and special education. Particularly, her work takes an international perspective, an understudied area that led to the National Collegiate Athletic Association (NCAA) to invite her to co-present this research at their annual Inclusion Forum. The survey developed through her preliminary study of the international student-athlete population continues to be utilized by researchers furthering this work. Additionally, she has published a chapter in a book on working with student-athletes with learning disabilities, and in the *NACADA Journal*, the premiere journal in the field of academic advising. Both of these have target audiences made up of practitioners in higher education and athletics. Newell's other publications are in sport management journals that are primarily focused on intercollegiate athletics, with readership primarily made up of sport management scholars.

Professor Heidi Parker's research expertise interest falls within the broad scope of consumer behavior. Parker studies sport consumers and how they respond, in attitude and behavior, to differing variables, providing insight on how to better please the consumer and increase the strength of their connection to an organization, product, or player. For instance, she studies fan's motives for watching sport, for attending games/tournaments, for becoming a fan, and in what ways information about their team or team's sponsor impacts them. Additionally, she examines variables which impact endorser and sponsor effectiveness. Her most recently accepted piece, examining endorser effectiveness, is in *Sport Marketing Quarterly*, a prominent sport marketing journal within the sport management discipline, which strives to be relevant for both academics and practitioners. Parker has also recently published an article regarding sport management education in *SMEJ*—the sport management discipline's educational journal. Parker collaborates with colleagues within the sport management discipline and publishes and presents the bulk of her research in/at traditional journals and conferences within the field of Sport Management.

APPENDIX 11: TABLE 2-1 INTELLECTUAL CONTRIBUTIONS

Part A: Five-Year Summary of Intellectual Contributions

Date range: 2014-2019

	Portfolio of Intellectual Contributions			Total	Types of Intellectual Contributions										Total	Percentages of Faculty Producing ICs	
	Basic or Discovery Scholarship	Applied or Integration/Scholarship	Teaching and Learning Scholarship		Peer-Reviewed Journals	Editorial-Reviewed Journals and Articles	Peer-Reviewed Academic/Professional Meeting Proceedings	Peer-Reviewed Academic/Professional Meeting Presentations	Competitive Research Awards Received	Textbooks	Case Studies	Professional Practice Standards, or Public Policy	Other IC Type Selected by the School	Percent of Participating Faculty Producing ICs		Percent of total Full Time Equivalent (FTE) faculty producing ICs	
Accounting																	
Belik, Barbara	0	1	1	2	0	2	0	0	0	0	0	0	0	2	*	100	
Dunbar, Lisa ¹	0	0	0	0	0	0	0	0	0	0	0	0	0	0	*	100	
Hansen, Stephen ²	3	0	1	4	0	2	0	0	0	0	1	0	0	4	*	100	
Ladd, Donald ³	0	0	0	0	0	0	0	0	0	0	0	0	0	0	*	100	
Passarelli, Joseph ⁴	0	0	0	0	0	0	0	0	0	0	0	0	0	0		12.5	
Roy, Marc ⁵	0	0	0	0	0	0	0	0	0	0	0	0	0	0		25	
Sanders, John	0	0	0	0	0	0	0	0	0	0	0	0	0	0	*	100	
Yousefvand Mansouri, Rozhin ⁶	0	0	0	0	0	0	0	0	0	0	0	0	0	0	*	100	
Total Accounting	3	1	2	6	0	4	0	0	0	0	1	0	1	6	33.3%	31.4%	
Business Analytics																	
Suleiman, James ⁷	0.5	0	2.25	2.75	0.5	0	0	0	2.25	0	0	0	0	2.75	*	100	
Takeda, Hirotochi ⁸	15	0	2.25	17.25	0	4	0	9	1.25	0	0	0	3	17.25	*	100	
Total Business Analytics	15.5	0	4.5	20	0.5	4	0	9	3.5	0	0	0	3	20	100.0%	100.0%	

Finance																	
DiBartolomeo, Jeffrey ⁹	0	1	0	1	0	0	0	0	0	0	0	0	0	1	1	*	100
Fernandez, Mark ¹⁰	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		12.5
Moore, Michael ¹¹	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		12.5
Smoluk, Bert	1	2	0	3	3	0	0	0	0	0	0	0	0	3	*	100	
Tharp, Derek ¹²	5	2	1	8	2	0	0	3	0	0	0	0	3	8	*	100	
Tibbetts, Racquel ¹³	0	0	0	0	0	0	0	0	0	0	0	0	0	0		25	
Total Finance	6	5	1	12	5	0	0	3	0	0	0	0	4	12	100.0%	85.7%	
General Management																	
Banks, Shannon ¹⁴	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		37.5
Benoit Norris, Catherine ¹⁵	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		25
Bilodeau, Richard ¹⁶	0	0	0.5	0.5	0	0	0	0	0.5	0	0	0	0	0.5	*	100	
Canarie, David	0	0	0	0	0	0	0	0	0	0	0	0	0	0		50	
De Oliveira, Eduardo ¹⁷	0	0	0	0	0	0	0	0	0	0	0	0	0	0		25	
El-Taha, Muhammad ¹⁸	0	0	0	0	0	0	0	0	0	0	0	0	0	0		25	
Gold, Joel ¹⁹	0	0	0	0	0	0	0	0	0	0	0	0	0	0		37.5	
Healy, Jennifer ²⁰	0	0	0	0	0	0	0	0	0	0	0	0	0	0		25	
Kerr, Dana	0	0	1	1	0	1	0	0	0	0	0	0	0	1	*	100	
Kohli, Amarpreet	0	4	4.5	8.5	3	0	0	2.5	1.5	0	0	1	0.5	8.5	*	100	
Li, Jie ²¹	12	0	0	12	4	0	0	5	1	0	0	2	0	12	*	100	
Manny, Carter	6	0	0	6	4	0	0	1	0	0	0	0	1	6	*	100	
Nelson, Janet ²²	0	0	0	0	0	0	0	0	0	0	0	0	0	0		12.5	
Pao, Roger ²³	0	0	0	0	0	0	0	0	0	0	0	0	0	0		12.5	
Rasmussen, Tove ²⁴	0	0	0	0	0	0	0	0	0	0	0	0	0	0		37.5	
Roderick, Jonathan	0	0	0	0	0	0	0	0	0	0	0	0	0	0		37.5	
Sussman, Lori ²⁵	0	0	0	0	0	0	0	0	0	0	0	0	0	0		25	
Thibodeau, Anne Marie ²⁶	1	0	0	1	0	0	0	0	0	0	0	0	1	1		25	
Voyer, John ²⁷	1	12	0	13	2	0	2	5	0	0	3	0	1	13	*	100	

Total General Management	20	16	6	42	13	1	2	13.5	3	0	3	3	3.5	42	100.0%	64.1%
Marketing																
Griffin, Patricia ²⁸	0.33	0.33	0.33	1	0	0.33	0	0.67	0	0	0	0	0	1	*	100
Hawkins, Ellen ²⁹	0	0	0	0	0	0	0	0	0	0	0	0	0	0		12.5
Heiser, Bob ³⁰	0.83	0.33	1.83	3	0	0.83	0	0.67	1.5	0	0	0	0	3	*	100
Palin, Gary ³¹	1.33	0.33	0.83	2.5	0	0.83	0	0.67	0	0	0	0	1	2.5	*	100
Rowean, James ³²	0	0	0	0	0	0	0	0	0	0	0	0	0	0		50
Xu, Zhenning ³³	9.5	4	2.5	16	1	3	3	0.5	2	0	0	4	2.5	16	*	100
Total Marketing	12	5	5.5	22.5	1	5	3	2.5	3.5	0	0	4	3.5	22.5	100.0%	86.5%
Sport Management																
Moore, Mark ³⁴	5	4	1	10	0	4	0	0	0	0	0	0	6	10		12.5
Newell, Emily ³⁵	0	1	0	1	0	1	0	0	0	0	0	0	0	1	*	100
Parker, Heidi	3	0	0.5	3.5	1.5	0	0	2	0	0	0	0	0	3.5	*	100
Shelton, Lori ³⁶	0	0	0	0	0	0	0	0	0	0	0	0	0	0		12.5
Williams, Joanne	0.5	2	0.5	3	1	0	0	2	0	0	0	0	0	3	*	100
Total Sport Management	8.5	7	2	17.5	2.5	5	0	4	0	0	0	0	6	17.5	100.0%	96.2%
Grand Total	65	34	21	120	22	19	5	32	10	0	4	7	21	120	83.3%	69.1%

⁷ Suleiman, James

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

⁸ Takeda, Hirotoshi

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

¹⁶ Bilodeau, Richard

Note: In 2018-2019 had interdisciplinary responsibilities in Marketing.

¹⁸ El-Taha, Muhammad

Note: In 2018-2019, had a joint appointment.

¹⁹ Gold, Joel

Note: In 2018-2019 had interdisciplinary responsibilities in Finance.

Note: In 2013-2014, in Finance.

²² Nelson, Janet

Note: In 2018-2019 had interdisciplinary responsibilities in Business Administration.

²⁴ Rasmussen, Tove

Note: In 2018-2019 had interdisciplinary responsibilities in Marketing.

²⁷ Voyer, John

Note: In 2018-2019 had interdisciplinary responsibilities in Dean's Office.

²⁹ Hawkins, Ellen

Note: In 2018-2019 had interdisciplinary responsibilities in Business Administration.

Note: In 2016-2017, in Business Administration.

³⁰ Heiser, Bob

Note: In 2018-2019 had interdisciplinary responsibilities in General Management, Business Administration.

Note: In 2016-2017, in Business Administration.

³¹ Palin, Gary

Note: In 2018-2019 had interdisciplinary responsibilities in General Management

APPENDIX 12: TABLE 2-2 FIVE-YEAR SUMMARY OF PEER- AND EDITORIALY REVIEWED JOURNALS

Table 2-2:
Five-Year Summary of Peer and Editorial-Reviewed Journals and Number of Publications in Each
 Date Range: **January 1, 2014 - August 31, 2019**

Peer and Editorial-Reviewed Journals		Count	ABDC 2018	Cabell's Accept	JCR impact
Accounting					
CPA Journal https://www.cpajournal.com/	Belik, B., Violette, G. (2018) Student perceptions of what it means to be a professional in CPA Firms: A survey of domestic and international accounting majors.	1	-	37%	-
IMA Educational Case Journal https://www.imanet.org/educators/ima-educational-case-journal?ssopc=1	Hansen, s. c., Brien, S., Pizzini, M. (2018). Cutting Commissaries: Approaches to Downsizing a Government Program.	1	C	50%	-
Journal of Management Accounting Research https://aaapubs.org/loi/jmar	Hansen, s. c., Hoozee, S. (2017). A Comparison of Activity-based Costing and Time-driven Activity-based Costing.	1	A	37%	
Today's CPA	Belik, B., Violette, G. (2018). What are the Desired Traits and Behaviors of New Public Accounting Professionals?	1	-	64%	-
Total Accounting		4			
Business Analytics					
Communications of the Association for Information Systems http://aisel.aisnet.org/cais/	Cuellar, M. J., Truex, D., Takeda, H. (2019). CARVing Quality vs. Characterizing Capital: The Scholarly Capital Model, a Portfolio Approach Cuellar, M. J., Truex, D., Takeda, H. (2019). Reconsidering Counting Articles in Ranked Venues (CARV) as the Appropriate Evaluation Criteria for the Advancement of Democratic Discourse in the IS Field.	2	A	8%	-
Journal of Direct, Data and Digital Marketing Practice	Williams, J., Chinn, S., Suleiman, J. (2014). The Value of Twitter for Sports Fans	0.5	-	-	-
Journal of the Association for Information Systems http://aisel.aisnet.org/jais/	Cuellar, M. J., Takeda, H., Vidgen, R., Truex, D. (2016). Ideational Influence, Connectedness, and Venue Representation: Making an Assessment of Scholarly Capital	1	A*	12%	2.84%
Journal of the Operational Research Society https://www.tandfonline.com/toc/tjor20/current	Antheaume, N., Thiel, D., de Corbiere, F., Rowe, F., Takeda, H. (2018). An analytical model to investigate the economic and environmental benefits of a supply chain resource-sharing scheme based on collaborative consolidation centres.	1	A	10-15%	1.40%

Peer and Editorial-Reviewed Journals		Count	ABDC 2018	Cabell's Accept	JCR impact
Total Business Analytics		4.5			
Finance					
Journal of Finance and Economics http://www.sciepub.com/journal/JFE	Smoluk, B. (2018). A Dynamically Engaged University, Knowledge Spillovers, and the Local Economy Smoluk, B. (2018). Oil Price Shocks: Bank Size and Firm Size Effects.	2	-	-	-
Journal of Personal Finance https://www.iarfc.org/publications/journal-of-personal-finance	Tharp, D. (2018). The behaviorally-enlightened fiduciary: Addressing moral dilemmas through a decision-theoretic model of moral value judgment.	1	-	35%	-
Journal of Retirement https://jor.ijournals.com/	Tharp, D., Kitces, M. (2018). Life-cycle earnings curves and safe savings rates.	1	C	-	-
Quarterly Journal of Finance and Accounting https://business.creighton.edu/qjfa	Smoluk, B. (in press). Money Demand, Bank Lending, and State Output	1	B	20%	-
Total Finance		5			
General Management					
Business Law Review http://www.kluwerlawonline.com/toc.php?pu bcode=BULA	Manny, C. (2016). Data Transfers From the EU to the U.S. After the Schrems Case. Manny, C. (2018). Driven Data: Connected Cars and Privacy Law. Manny, C. (2014). Recent Controversy Surrounding the EU - US Safe Harbor Data Protection Regime. Manny, C. (2015). The European Union's "Right to be Forgotten".	4	C	30%	-
European Journal of Work and Organizational Psychology https://www.tandfonline.com/toc/pewo20/current	LI, J., Laurence, G., Blume, B. (2018). How does supervisor-focused procedural justice explain the effects of person-focused leadership? The moderating role of leader-referenced relational-self.	1	B	15%	
International Journal of Emergency Management https://www.inderscience.com/jhome.php?jcode=ijem	Voyer, J., Dean, M., Pickles, C. (2016). Hospital Evacuation in Disasters: Uncovering the Systemic Leverage Using System Dynamics.	1	C	18%	-
International Journal of Information Systems and Supply Chain Management https://www.igi-global.com/journal/international-journal-information-systems-supply/1097	Kohli, A. (2017). Factors affecting willingness of Industries to adopt RFID. Kohli, A., Hawkins, E. (2015). Motivators to adopt Green Supply Chain Initiatives	2	C	21-30%	-
International Journal of Management in Education	Kohli, H., Ross, F., Kohli, A., Peng, C. (2016). Universal-Diverse Orientation of Business, Education, and Social Work students.	1	-	23%	-

Peer and Editorial-Reviewed Journals		Count	ABDC 2018	Cabell's Accept	JCR impact
https://www.inderscience.com/jhome.php?jcode=ijmie					
Japanese Psychological Research	Laurence, G., Fried, Y., Yan, W., LI, J. (2019). Enjoyment of work and driven to work as motivations of job crafting: Evidence from Japan and China.	1	-	-	-
Journal of Applied Risk Management and Insurance	Kerr, D., Avila, S., Gatzlaff, K., Dean, C. G. (2014). The Process of Implementing an Insurance Company Simulation Game.	1	-	-	-
Journal of Leadership and Organizational Studies http://jlo.sagepub.com	LI, J., Furst-Holloway, S., Gales, L., Masterson, S., Blume, B. (2017). Not All Transformational Leadership Behaviors Are Equal: The Impact of Followers' Identification With Leader and Modernity on Taking Charge.	1	C	11%	1.67
Journal of Managerial Psychology https://www.emeraldgrouppublishing.com/jmp.htm	LI, J., Furst-Holloway, S., Masterson, S., Gales, L., Blume, B. (2018). Leader-member exchange and leader identification: Comparison and integration.	1	C	9%	1.55
Systems	Voyer, J., Jordan, T. (2018). A Veterinary Telemedicine Case Study.	1	-	-	-
Total General Management		14			
Marketing					
Business Education Forum https://www.nbea.org/newsite/publications/business_forum.html	Heiser, B., Palin, G. (2019). Using Online Debates to Increase Student Engagement in Marketing.	1	-	30%	-
Emerging Markets Finance and Trade https://www.tandfonline.com/toc/mree20/current	Xu, Z. (2018). Board Business Connections and Firm Profitability: Evidence from China.	1	B	15%	.83
Journal of Academy of Business Education https://www.abeweb.org/	Palin, G. R., Griffin, P., Heiser, R. S. (2019). Transformative Learning in Sales Education.	1	-	26%	-
Journal of Business Research	Xu, Z., Frankwick, G. L., Ramirez, E. (2016). Effects of big data analytics and traditional marketing analytics on new product success: A knowledge fusion perspective.	1	A	-	-
Journal of Marketing Theory and Practice https://www.tandfonline.com/toc/mmtp20/current	Xu, Z. (2018). User Generated Content as Word of Mouth.	1	B	-	-
Qualitative Market Research: an international journal https://www.emeraldgrouppublishing.com/products/journals/journals.htm?id=qmr	Xu, Z. (2019). Unlocking value through an extended social media analytics framework: Insights for new product adoption	1	B	30%	-
Total Marketing		6			

Peer and Editorial-Reviewed Journals		Count	ABDC 2018	Cabell's Accept	JCR impact
Sport Management					
Innovative Marketing	Moore, M. E., Zemanek, J. E. (2014). Brand name ethics as a marketing concern: a narrative inquiry of the Washington Redskins' debate. Moore, M. (2014). Tribalism among US-Based Premier League supporters' groups: a tribal marketing perspective.	2	-	-	-
International Journal of Humanities and Social Science Invention	Moore, M. E., Huberty, L. (2014). Gender Differences in a Growing Industry: A Case of Sport Management Education.	1	-	-	-
International Journal of New Technologies in Science and Engineering	Payne, K. M., Moore, M., Huberty, L. L. (2015). Stress and Burnout in Certified Athletic Trainers.	1	-	-	-
Journal of Direct, Data and Digital Marketing Practice	Williams, J., Chinn, S., Suleiman, J. (2014). The Value of Twitter for Sports Fans.	0.5	-	-	-
NACADA Journal	Newell, E. (2015). International Student–Athlete Adjustment Issues: Advising Recommendations for Effective Transitions	1	-	-	
Sport Management Education Journal http://journals.humankinetics.com/page/about/smej	Williams, J., Parker, H. M. (2016). Integration of experiential learning and leadership development in a sport management classroom.	1	C	-	-
Sport Marketing Quarterly	Parker, H. M., Mudrick, M. M., Fink, J. S. (2019). The impact of gender expression on female athlete endorser effectiveness	1	B	24%	.69
Total Sport Management		7.5			
Grand Total		41.0			

APPENDIX 13: CRITERIA FOR FACULTY QUALIFICATIONS

		Sustained Engagement Activities	
		Academic/Scholarly	Applied/Practice
Initial academic preparation and professional experience	Doctoral Degree	Scholarly Academic (SA)	Practice Academic (PA)
	Professional experience substantial in duration and level of responsibility	Scholarly Practitioners (SP)	Instructional Practitioners (IP)

School-wide portfolio requirements:

Any faculty member not identified with a box is considered “other.”

$$(SA+PA+SP+IP)/(SA+PA+SP+IP+Other) \geq 90\%$$

$$(SA+PA+SP)/(SA+PA+SP+IP+Other) \geq 60\%$$

$$(SA)/(SA+PA+SP+IP+Other) \geq 40\%$$

Scholarly Academics (SA) sustain currency and relevance through scholarship and related activities. Normally, SA status is granted to newly hired faculty members who earned their research doctorates within the last five years prior to the review dates. Subsequent to hiring, SA status is sustained as outlined below.

Practice Academics (PA) sustain currency and relevance through professional engagement, interaction, and relevant activities. Normally, PA status applies to faculty members who augment their initial preparation as academic scholars with development and engagement activities that involve substantive linkages to practice, consulting, other forms of professional engagement, etc., based on the faculty members’ earlier work as an SA faculty member. PA status is sustained as outlined below.

Scholarly Practitioners (SP) sustain currency and relevance through continued professional experience, engagement, or interaction and scholarship related to their professional background and experience. Normally, SP status applies to practitioner faculty members who augment their experience with development and engagement activities involving substantive scholarly activities in their fields of teaching. SP status is sustained as outlined below.

Instructional Practitioners (IP) sustain currency and relevance through continued professional experience and engagement related to their professional backgrounds and experience. Normally, IP status is granted to newly hired faculty members who join the faculty with significant and substantive professional experience as outlined below. IP status is sustained as outlined below.

- **Other (O)** Faculty who do not meet the criteria for SA, PA, SP, or IP.

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<p>Scholarly Academic: SAs sustain currency and relevance through scholarship and related activities. Normally, SA status is granted to newly hired faculty members who earned their research doctorates within the last five years prior to the review dates.</p> <p>A*, A, B and C journals are defined by the Australian Business Dean's Council Journal Ranking List. Any journal that is not on that list but is contained in Cabell's Classification Index is automatically assumed to be a C journal. If a faculty member feels a journal that is not on the ABDC list should be ranked higher than a C, they may appeal to the AQ&MIC for a specific ranking provided: the journal is not on Beal's list of predatory publishers the faculty member is able to provide established quality metrics like those shown in the scholarly impact report or as provided by Scopus or Web of Science. Self-reported journal acceptance rates are not an acceptable metric.</p>	<p>Must have a Doctoral Degree and one or more of the following within the last five years:</p> <ol style="list-style-type: none"> 1. Doctoral degree obtained within the last five year; doctoral students who have obtained ABD status (all but dissertation) are considered SA for three year. 2. A Doctoral Degree and one or more of the following within the last five years: <ol style="list-style-type: none"> a. Published article in one A or A* peer-reviewed journal (5 – 6 pts.); b. Published two or more articles in B or C peer-reviewed journals (6+ pts.). <hr/> <p>Beginning Fall 2019, the activities listed below no longer count toward the minimum required 5 points for SA qualification. These activities are still considered in personnel evaluations and promotion and tenure reviews. The IEI Committee will recommend whether and how to use those point allocations in the future.</p> <p><u>Group (A) (2 pts.):</u></p> <ol style="list-style-type: none"> 1. Published academic textbooks in area (not self-published); 2. Published case studies and instructional materials; <p><u>Group (B) (1 pts.):</u></p> <ol style="list-style-type: none"> 1. Subsequent editions of published academic textbooks; 2. Scholarly monograph (peer-reviewed and not self-published) 3. Book chapter in scholarly monograph (peer-reviewed and not previously published or self-published) 4. Academic conference paper presentation at international, national, or regional meeting with conference proceedings; 5. Relevant, active editorships with academic journals or other business publications; 6. Publicly available working papers; 7. Leadership positions and related participation in recognized academic societies and associations; 8. External research awards, invitation to publish in non-referred book and invited presentations; 9. Publicly available instructional software or other teaching materials. <p><u>Group (C) (½ pt.):</u></p> <ol style="list-style-type: none"> 1. Papers under review at peer-reviewed journals 2. Academic paper presentation at international, national, or regional meeting without proceedings; 3. Academic conference panel chair, reviewer and/or paper discussant; 4. Article in edited volume; 5. Member of editorial board of an academic journal; 6. Published book review in an academic journal; 7. Ad hoc reviewing for academic journals; 8. Textbook reviewing; 9. External reviewer of scholarship for promotion or tenure 10. Media hits on relevant research topic; 11. Member of Conference Program Committee; 12. Research presentation to practitioners; 13. Invited presentations.
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<p>Practice Academic: PAs sustain currency and relevance through professional engagement, interaction, and relevant activities. Normally, PA status applies to faculty members who augment their initial preparation as academic scholars with development and engagement activities that involve substantive linkages to practice, consulting, other forms of professional engagement, etc., based on the faculty members' earlier work as an SA faculty member.</p>	<p>Must have a Doctoral Degree and accrue five points over the last five years. Activities which take place over multiple years are counted separately for each year. PA status is sustained in one of the following three ways:</p> <ol style="list-style-type: none"> 1. One B or C peer-reviewed journal article and one or more from Groups (A), (B), or (C) to reach 5 pts.; 2. Practice-oriented published intellectual contributions (not self-published) (2 pts. each) and one or more from Groups (A), (B), or (C) to reach 5 pts. Practice-oriented publishing includes <ol style="list-style-type: none"> a. Textbooks, monographs, or trade books; b. Training manuals; c. Articles in trade journals or edited volume; d. Book chapters; e. Published case studies and instructional materials; f. Instructional software and other teaching materials; g. Research or technical reports; h. Creator of publicly available school/university strategic plan. 3. Activities from Groups (A), (B), or (C) to accrue 5 pts. <p><u>Group (A) (2 pts.)</u></p> <ol style="list-style-type: none"> 1. Relevant paid consulting that is material in terms of time and substance (90 or more hours per semester); 2. Creation of publicly-available school or university strategic documents; 3. Sustained responsibilities or ownership in an outside business related to the area of teaching; <p><u>Group (B) (1 pt.)</u></p> <ol style="list-style-type: none"> 1. Achieve or maintain professional licenses or certifications (e.g., CFA, CMA, CPA); 2. Serve on AACSB Peer Review Team; 3. Relevant, active service as Board member (paid or not) for a for-profit or not-for-profit organization; 4. Community-based teaching (e.g., Capstone) with reports to clients; 5. Publicly available working papers; <p><u>Group (C) (½ pt.)</u></p> <ol style="list-style-type: none"> 1. Conference paper w/ proceedings 2. Leadership role in professional workshops or seminars in area of teaching; 3. Attend professional workshops or seminars in area of teaching; 4. Documented progress toward professional certification (per level); 5. Continuing education including that to maintain professional license; 6. Media hits related to area of teaching; 7. Reviews of papers submitted for conferences; 8. Major review of non-profit organization with report; 9. Invited presentations.
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<p>Scholarly Practitioner: SPs sustain currency and relevance through continued professional experience, engagement, or interaction and scholarship related to their professional background and experience. Normally, SP status applies to practitioner faculty members who augment their experience with development and engagement activities involving substantive scholarly activities in their fields of teaching.</p>	<p>Must have a Master's Degree in Area of Teaching and accrue five points over the last five years. Activities which take place over multiple years are counted separately for each year. SP status sustained in one of the following three ways:</p> <ol style="list-style-type: none"> 1. One A or A* peer-reviewed journal (5 – 6 pts.); 2. At least one B (4 pts) or C (3 pts) peer-reviewed journals plus activities from Group A, B, or C to accrue a total of five points. 3. Activities from Groups (A), (B), or (C) to accrue 5 pts. <p><u>Group (A) (2 pts.)</u> Published intellectual contributions (not self-published) including</p> <ol style="list-style-type: none"> 4. Textbooks, scholarly books, or trade books on a topic relevant to teaching 5. Training manuals; 6. Monographs; 7. Published case studies and instructional materials; 8. Publicly available instructional software or other teaching materials; <p><u>Group (B) (1 pt.)</u></p> <ol style="list-style-type: none"> 1. Revised or subsequent editions of trade or textbooks; 2. Maintain professional licenses or certifications (e.g., CFA, CMA, CPA); 3. External grant or award; 4. Publicly available working papers; 5. Chapter in a published scholarly book; 6. Academic conference chair, reviewer and/or paper discussant; 7. Leadership positions or substantive roles in recognized academic societies or professional organizations; <p><u>Group (C) (1/2 pt.)</u></p> <ol style="list-style-type: none"> 1. Research or technical reports; 2. Book review or Textbook reviewing 3. Articles in trade journals or edited volume; 4. Professional development work such as developing and conducting workshops or seminars. 5. Editorships with academic, professional or other business/management publications; 6. Service on editorial boards or committees; 7. Presentations at academic conferences or professional meetings; 8. Ad-hoc journal reviewing; 9. Media quote on a topic related to teaching or research
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<p>Instructional Practitioner</p> <p>IPs sustain currency and relevance through continued professional experience and engagement related to their professional backgrounds and experience. Normally, IP status is granted to newly hired faculty members who join the faculty with significant and substantive professional experience as outlined below. IP status is sustained as outlined below.</p>	<p>Must have a Master's Degree in Area of Teaching; IP faculty are qualified for 5 years after leaving a fulltime job.</p> <p>Must have one of the following over the last five years. Activities which take place over multiple years are counted separately for each year:</p> <ol style="list-style-type: none"> 1. Full-time employment relevant to area of teaching; (5 pts) 2. Sustained professional responsibilities or work outside the university relevant to area of teaching (3 pts.) plus activities from Group A and B to accrue a total of five points. Activities which take place over multiple years are counted separately for each year. <p><u>Group (A) (1 pt.)</u></p> <ol style="list-style-type: none"> 1. Maintain professional licenses or certifications relevant to area of teaching (e.g., CFA, CMA, CFE, CPA) (3 pts. total over 5 years); 2. Develop or lead an outside professional workshop or seminar relevant to area of teaching; 3. Presentation or invited talk to community partners on topics relevant to disciplinary expertise; 4. Media interviews related to area of expertise; 5. Relevant active service in a local professional organization or government; 6. Member on a Board of Directors or Advisors for a for-profit or non-profit organization; 7. Leadership position in a business professional association or society; 8. Published case; 9. Consulting activities that are material in terms of time and substance. <p><u>Group (B) ½ pt.)</u></p> <ol style="list-style-type: none"> 1. Documented continuing education toward certification (1/2 pt. per level) or beyond that required to maintain professional license; 2. Attendance at professional workshops or seminars relevant to area of teaching; 3. Case presentation at conferences or to community partners; Documented participation in business professional associations and societies.
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APPENDIX 14: TABLE 15-1 FACULTY SUFFICIENCY AND QUALIFICATIONS

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019											
Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Accounting											
Belik, Barbara	September 1, 2009	JD, 1994	429 sch		UT, MT, RES and SER	100					Peer Reviewed Journals
Dunbar, Lisa	September 1, 2015	MS, 1993	618 sch		UT and SER				100		Sustained professional responsibilities Professional Certification (CPA)
Hansen, Stephen	September 1, 2018	Ph D, 1988	348 sch		UT, MT, RES and SER	100					Peer Reviewed Journals Academic Presentations
Ladd, Donald	September 1, 2015	MS, 1999	300 sch		UT, MT, ADM and SER				100		Professional Certification (CMA)/Continuing Education to Maintain Licensure
Passarelli, Joseph	January 1, 2007	MBA, 1999		36 sch	MT				12.5		Full-time employment relevant to area of teaching

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Roy, Marc	September 1, 2018	MS, 2010		129 sch	MT				25		Full-time employment relevant to area of teaching
Sanders, John	September 1, 1982	MBA, 1977	273 sch		UT and SER		100				Professional Certification (CPA, CMA, CFE)/Consulting activities
Yousefvand Mansouri, Rozhin	September 1, 2018	Ph D, 2018	393 sch		UT, MT, RES and SER	100					PhD in discipline within the last five years/Peer Reviewed Journals/Academic Presentations
Total Accounting			2361 sch	165 sch		300 (47.1%)	100 (15.7%)	0 (0.0%)	237.5 (37.3%)	0 (0.0%)	
			P ≥ 60% guideline for AACSB met (93.5%)			SA ≥ 40% guideline for AACSB met (47.1%) SA + PA + SP ≥ 60% guideline for AACSB met (62.7%) SA + PA + SP + IP ≥ 90% guideline for AACSB met (100.0%)					
Business Analytics											
Suleiman, James ¹	September 1, 2002	Ph D, 1998	372 sch		UT, MT, RES and SER	37.5					Peer Reviewed Journals/Grants

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Takeda, Hirotochi ²	September 1, 2018	Ph D, 2015	405 sch		UT, MT, RES and SER	25					PhD in discipline within the last five years/Peer Reviewed Journals/Academic Presentations
Total Business Analytics			777 sch	0 sch		62.5 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
			P ≥ 60% guideline for AACSB met (100.0%)			SA ≥ 40% guideline for AACSB met (100.0%) SA + PA + SP ≥ 60% guideline for AACSB met (100.0%) SA + PA + SP + IP ≥ 90% guideline for AACSB met (100.0%)					
Finance											
DiBartolomeo, Jeffrey	September 1, 2018	Ph D, 2018	459 sch		UT, MT, RES and SER	100					PhD in discipline within last five years
Fernandez, Mark	January 1, 2019	MBA, 1979		36 sch	UT				12.5		Full-time employment relevant to area of teaching
Moore, Michael		BBA, 1994		111 sch					12.5		Full-time employment relevant to area of teaching

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Smoluk, Bert	September 1, 1998	Ph D, 1997	87 sch		UT, MT, RES and SER	100					Peer Reviewed Journals/Media Hits Sabbatical Fall 2018
Tharp, Derek	September 1, 2018	Ph D, 2017	483 sch		UT, MT, RES and SER	100					PhD in discipline within the last five years/Peer Reviewed Journals/Academic Presentations
Tibbetts, Racquel	January 1, 2018	Ph D, 2015		189 sch	UT and SER		25				PhD in discipline within the last five years Full-time employment relevant to area of teaching
Total Finance			1029 sch	336 sch		300 (85.7%)	25 (7.1%)	0 (0.0%)	25 (7.1%)	0 (0.0%)	
			P ≥ 60% guideline for AACSB met (75.4%)			SA ≥ 40% guideline for AACSB met (85.7%) SA + PA + SP ≥ 60% guideline for AACSB met (92.9%) SA + PA + SP + IP ≥ 90% guideline for AACSB met (100.0%)					
General Management											
Banks, Shannon	January 1, 2017	MS, 2002		186 sch	UT				37.5		Full-time employment relevant to area of teaching

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Benoit Norris, Catherine	January 1, 2018	Ph D, 2015		195 sch	UT		25				PhD in discipline within the last five years/Full-time employment relevant to area of teaching
Bilodeau, Richard ³	September 1, 2015	MBA, 1998	402 sch		UT, MT and SER				87.5		Sustained professional responsibilities. Consulting Activities
Canarie, David	September 1, 2008	JD, 1981		336 sch	UT				50		Full-time employment relevant to area of teaching/Leads professional workshops and seminars
De Oliveira, Eduardo	January 1, 2017	MBA, 2013		111 sch	UT				25		Full-time employment relevant to area of teaching
El-Taha, Muhammad ⁴	September 1, 1987	Ph D, 1987		159 sch	UT	25					Peer Reviewed Journals/Full Professor in Mathematics and Statistics
Gold, Joel	September 1, 1973	Ph D, 1990		282 sch	UT		37.5				Full-time employment relevant to area of teaching/Retired Full Professor

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Healy, Jennifer	September 1, 2015	MA, 2013		231 sch	UT				25		Full-time employment relevant to area of teaching
Heiser, Bob ⁵	September 1, 2005	Ph D, 2005	513 sch		UT, MT, RES and SER	12.5					Peer Reviewed Journals/Academic Presentations
Kerr, Dana	September 1, 2008	Ph D, 2002	336 sch		UT, MT, RES and SER	100					Peer Reviewed Journals/Media Hits
Kohli, Amarpreet	September 1, 2006	Ph D, 2005	477 sch		UT, MT, RES and SER	100					Peer Reviewed Journals/Academic Presentations
Li, Jie	September 1, 2018	Ph D, 2012	477 sch		UT, MT, RES and SER	100					Peer Reviewed Journals/Academic Presentations/Editorial Board
Manny, Carter	September 1, 1986	JD, 1975	558 sch		UT, MT, RES and SER	100					Peer Reviewed Journals/Academic Presentations
Nelson, Janet	June 1, 2010	MA, 2005		39 sch	UT and MT				12.5		Full-time employment relevant to area of teaching/ABD Weatherhead School of Management, Case Western University

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Palin, Gary ⁶	September 1, 2015	MBA, 1986	240 sch		UT, MT and SER			37.5			Peer Reviewed Journals/Consulting activities that are material in terms of time and substance
Pao, Roger	September 1, 2018	JD, 2006		36 sch	MT					12.5	Part-Time Instructor
Rasmussen, Tove ⁷	September 1, 2016	MBA, 1992		282 sch	UT				25		Full-time employment relevant to area of teaching
Roderick, Jonathan	January 1, 2004	MBA, 2003		270 sch	UT				37.5		Full-time employment relevant to area of teaching
Suleiman, James ¹	September 1, 2002	Ph D, 1998	372 sch		UT, MT, RES and SER	62.5					Peer Reviewed Journals/Grants
Sussman, Lori	September 1, 2018	MS, 1984		228 sch	UT				25		Full-time employment relevant to area of teaching
Takeda, Hirotoshi ²	September 1, 2018	Ph D, 2015	405 sch		UT, MT, RES and SER	75					PhD in discipline within the last five years/Peer Reviewed Journals/Academic Presentations

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Thibodeau, Anne Marie	September 1, 2018	Ph D, 2002		138 sch	UT					25	Part-Time Instructor
Voyer, John	September 1, 1987	Ph D, 1986	459 sch		UT, MT, RES and SER	100					Peer Reviewed Journals/Academic Presentations/Editorial Board
Total General Management			4239 sch	2493 sch		675 (59.3%)	62.5 (5.5%)	37.5 (3.3%)	325 (28.6%)	37.5 (3.3%)	
			P ≥ 60% guideline for AACSB met (63.0%)			SA ≥ 40% guideline for AACSB met (59.3%) SA + PA + SP ≥ 60% guideline for AACSB met (68.1%) SA + PA + SP + IP ≥ 90% guideline for AACSB met (96.7%)					
Marketing											
Bilodeau, Richard ³	September 1, 2015	MBA, 1998	402 sch		UT, MT and SER				12.5		Sustained professional responsibilities. Consulting Activities
Griffin, Patricia	September 1, 2015	Ph D, 2013	666 sch		UT and SER	100					Peer Reviewed Journals/Academic Presentations
Hawkins, Ellen	September 1, 2010	MBA, 2010		33 sch	UT				12.5		Full-time employment relevant to area of teaching

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Heiser, Bob ⁵	September 1, 2005	Ph D, 2005	513 sch		UT, MT, RES and SER	87.5					Peer Reviewed Journals/Academic Presentations
Palin, Gary ⁶	September 1, 2015	MBA, 1986	240 sch		UT, MT and SER			62.5			Peer Reviewed Journals/Consulting activities that are material in terms of time and substance
Rasmussen, Tove ⁷	September 1, 2016	MBA, 1992		282 sch	UT				12.5		Full-time employment relevant to area of teaching
Rowean, James	May 1, 2006	MA, 1972		366 sch	UT				50		Full-time employment relevant to area of teaching (retired 2016)
Xu, Zhenning	September 1, 2015	Ph D, 2016	609 sch		UT, MT, RES and SER	100					PhD in discipline within the last five year/Peer Reviewed Journals/Academic Presentations
Total Marketing			2430 sch	681 sch		287.5 (65.7%)	0 (0.0%)	62.5 (14.3%)	87.5 (20.0%)	0 (0.0%)	
			P ≥ 60% guideline for AACSB met (78.1%)			SA ≥ 40% guideline for AACSB met (65.7%) SA + PA + SP ≥ 60% guideline for AACSB met (80.0%)					

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
						SA + PA + SP + IP ≥ 90% guideline for AACSB met (100.0%)					
Sport Management											
Moore, Mark	September 1, 2017	Ph D, 1987		45 sch	UT	12.5					Peer Reviewed Journals/Academic Presentations/Editorial Board
Newell, Emily	September 1, 2018	Ph D, 2016	315 sch		UT, MT, RES and SER	100					PhD in discipline within the last five years Peer Reviewed Journals/Academic Presentations
Parker, Heidi	September 1, 2010	Ph D, 2007	327 sch		UT, MT, RES and SER	100					Peer Reviewed Journals/Academic Presentations/Editorial Board
Shelton, Lori		MS, 2005		87 sch	UT				12.5		Full-time employment relevant to area of teaching
Williams, Joanne ⁸	September 1, 2007	D.PE., 1998			ADM	100					College Dean, Peer Reviewed Journals/Academic Presentations

Faculty Sufficiency by student credit hours, September 1, 2018 – May 31, 2019

Faculty Portfolio			Faculty Sufficiency Related to Teaching (Std. 5)		Normal Professional Responsibilities ³	Percent of Time Devoted to Mission for Each Faculty Qualification Group ⁵ (Std. 15)					Brief Description of Basis for Qualification
Faculty Member's Name	Date of First Appointment to the School	Highest Degree, Year Earned	Participating Faculty Teaching Productivity (P) ²	Supporting Faculty Teaching Productivity (S) ²		Scholarly Academic (SA) ⁴	Practice Academic (PA) ⁴	Scholarly Practitioner (SP) ⁴	Instructional Practitioner (IP) ⁴	Other (O) ⁴	
Total Sport Management			642 sch	132 sch		312.5 (96.2%)	0 (0.0%)	0 (0.0%)	12.5 (3.8%)	0 (0.0%)	
			P ≥ 60% guideline for AACSB met (82.9%)			SA ≥ 40% guideline for AACSB met (96.2%) SA + PA + SP ≥ 60% guideline for AACSB met (96.2%) SA + PA + SP + IP ≥ 90% guideline for AACSB met (100.0%)					
Grand Total			11478 sch	3807 sch		1937.5 (65.7%)	187.5 (6.4%)	100 (3.4%)	687.5 (23.3%)	37.5 (1.3%)	
			P ≥ 75% guideline for AACSB met (75.1%)			SA ≥ 40% guideline for AACSB met (65.7%) SA + PA + SP ≥ 60% guideline for AACSB met (75.4%) SA + PA + SP + IP ≥ 90% guideline for AACSB met (98.7%)					
Faculty Sufficiency Indicators ¹ :						Faculty Qualifications Indicators ¹ :					
<ul style="list-style-type: none"> Overall guideline: $P/(P+S) \geq 75\%$ By discipline, location, delivery mode, or program: $P/(P+S) \geq 60\%$ 						<ul style="list-style-type: none"> SA guideline: $SA/(SA + PA + SP + IP + O) \geq 40\%$ SA + PA + SP guideline: $(SA + PA + SP)/(SA + PA + SP + IP + O) \geq 60\%$ SA + PA + SP + IP guideline: $(SA + PA + SP + IP)/(SA + PA + SP + IP + O) \geq 90\%$ 					

- This summary information is useful in assisting the peer review team in its initial assessment of alignment with Standards 5 and 15. The summary information allows the team to effectively focus its in-depth review of individual faculty vitae or other documents supporting the conclusions presented in the table. List all faculty contributing to the mission of the school including participating and supporting faculty, graduate students who have formal teaching responsibilities, and administrators holding faculty rank. For faculty not engaged in teaching, leave columns 4 and 5 (Faculty Sufficiency) blank. Faculty who left during the time frame represented in the table should not be included. Faculty members who joined the school for any part of the time frame are to be included. The school must explain the "normal academic year" format/schedule. Peer review teams may request documentation for additional years; for individual terms; or by programs, location, delivery mode, and/or discipline.

2. The measure of "teaching productivity" must reflect the operations of the business school, e.g. student credit hours (SCHs), European Credit Transfer Units (ECTUs), contact hours, individual courses, modules, or other designations that are appropriately indicative of the teaching contributions of each faculty member. Concurrence of the metric must be reached with the peer review team early in the review process. If a faculty member has no teaching responsibilities, he or she must be listed and reflected in the qualifications section of the table. Online courses should use the same teaching metric being used for in-person courses and the manner in which this is calculated should be described.
3. Indicate the normal professional responsibilities of each faculty member using the following guide: UT for undergraduate teaching; MT for master's level teaching; DT for doctoral level teaching/mentoring; ADM for administration; RES for research; ED for executive education; SER for other service and outreach responsibilities. A faculty member may have more than one category assigned. Individuals who teach only in non-credit executive education programs should not be listed in this table.
4. For faculty qualifications based on engagement activities, faculty members may be Scholarly Academic (SA), Practice Academic (PA), Scholarly Practitioner (SP), Instructional Practitioner (IP), or Other (O). Faculty members should be assigned one of these designations based on the school's criteria for initial qualifications and continuing engagement activities that support currency and relevance in the teaching field and to support other mission components. Faculty may meet the school's criteria for more than one category (e.g. SA and PA), but must be listed in only one category. Doctoral students who have obtained ABD status are normally considered SA or PA (depending on the nature of the doctoral degree) for 3 years. Faculty who have earned a doctoral degree will normally be considered SA or PA (depending on the nature of the doctoral degree) for 5 years from the date the degree is awarded. The "Other" category should be used for those individuals holding a faculty title but whose qualifications do not meet the criteria established by the school for SA, PA, SP, or IP status.
5. The "percent of time devoted to mission" reflects each faculty member's contributions to the school's overall mission during the period of evaluation. Reasons for less than 100 percent might include part-time employment, shared appointment with another academic unit, or other assignments that make the faculty member partially unavailable to the school. A full-time faculty member's percent of time devoted to mission is 100 percent. For doctoral students who have formal teaching duties, the percent of time devoted to mission should reflect their teaching duties only and not any other activities associated with their roles as a student, e.g. work on a dissertation. For example, a doctoral student who teaches one class over the normal academic year and a part-time faculty member whose responsibilities are limited to the same level of activity should be assigned the same "percent of time devoted to mission." A faculty member teaching in more than one discipline may be listed multiple times, but the percent of time devoted to mission should be reflected proportionally in each discipline and not be more than 100 percent. For part-time faculty the expected percentage is less than 100 percent and should reflect the amount of time devoted to the mission. If a school used a full-time equivalent (FTE) human resources system then the FTE may be a reasonable approximation for "percent of time devoted to mission." In the absence of an FTE system, the school should have a rational manner of assigning the percentage to part-time faculty that is agreed to by the Peer Review Team well in advance of the submission of the report.

¹ Suleiman, James

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

² Takeda, Hirotochi

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

³ Bilodeau, Richard

Note: In 2018-2019 had interdisciplinary responsibilities in Marketing.

⁴ El-Taha, Muhammad

Note: In 2018-2019, had a joint appointment.

⁵ Heiser, Bob

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

⁶ Palin, Gary

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

⁷ Rasmussen, Tove

Note: In 2018-2019 had interdisciplinary responsibilities in Marketing.

⁸ Williams, Joanne

Note: In 2018-2019, did not teach any course.

APPENDIX 15: TABLE 15-2 DEPLOYMENT OF FACULTY BY QUALIFICATION

Percent of teaching by degree program (measured by student credit hours)						
Date range: September 1, 2018 – May 31, 2019						
	Scholarly Academic (SA) %	Practice Academic (PA) %	Scholarly Practitioner (SP) %	Instructional Practitioner (IP) %	Other (O) %	Total %
Bachelor's	59.88%	7.52%	1.92%	29.72%	0.96%	100%
	Scholarly Academic (SA) (7476 Student Credit Hours)					
	Belik, Barbara (420 Student Credit Hours)					
	DiBartolomeo, Jeffrey (411 Student Credit Hours)					
	El-Taha, Muhammad (159 Student Credit Hours) ¹					
	Griffin, Patricia (666 Student Credit Hours)					
	Hansen, Stephen (348 Student Credit Hours)					
	Heiser, Bob (447 Student Credit Hours) ²					
	Kerr, Dana (336 Student Credit Hours)					
	Kohli, Amarpreet (441 Student Credit Hours)					
	Li, Jie (477 Student Credit Hours)					
	Manny, Carter (516 Student Credit Hours)					
	Moore, Mark (45 Student Credit Hours)					
	Newell, Emily (315 Student Credit Hours)					
	Parker, Heidi (327 Student Credit Hours)					
	Smoluk, Bert (42 Student Credit Hours)					
	Suleiman, James (336 Student Credit Hours) ³					
	Takeda, Hirotooshi (399 Student Credit Hours) ⁴					
	Tharp, Derek (447 Student Credit Hours)					
	Voyer, John (393 Student Credit Hours)					
	Xu, Zhenning (558 Student Credit Hours)					
	Yousefvand Mansouri, Rozhin (393 Student Credit Hours)					
	Practice Academic (PA) (939 Student Credit Hours)					
	Benoit Norris, Catherine (195 Student Credit Hours)					
	Gold, Joel (282 Student Credit Hours)					
	Sanders, John (273 Student Credit Hours)					
	Tibbetts, Racquel (189 Student Credit Hours)					
	Scholarly Practitioner (SP) (240 Student Credit Hours)					
	Palin, Gary (240 Student Credit Hours) ⁵					
	Instructional Practitioner (IP) (3711 Student Credit Hours)					
	Banks, Shannon (186 Student Credit Hours)					
	Bilodeau, Richard (402 Student Credit Hours) ⁶					
	Canarie, David (336 Student Credit Hours)					
	De Oliveira, Eduardo (111 Student Credit Hours)					
	Dunbar, Lisa (618 Student Credit Hours)					
	Fernandez, Mark (36 Student Credit Hours)					
	Hawkins, Ellen (33 Student Credit Hours)					
	Healy, Jennifer (231 Student Credit Hours)					
	Ladd, Donald (285 Student Credit Hours)					

	Moore, Michael (111 Student Credit Hours)					
	Rasmussen, Tove (282 Student Credit Hours) ⁷					
	Roderick, Jonathan (270 Student Credit Hours)					
	Rowean, James (366 Student Credit Hours)					
	Roy, Marc (129 Student Credit Hours)					
	Shelton, Lori (87 Student Credit Hours)					
	Sussman, Lori (228 Student Credit Hours)					
	Other (O) (120 Student Credit Hours)					
	Thibodeau, Anne Marie (120 Student Credit Hours)					
MBA	75.98%	0%	0.49%	14.71%	8.82%	100%
	Scholarly Academic (SA) (465 Student Credit Hours)					
	Belik, Barbara (9 Student Credit Hours)					
	DiBartolomeo, Jeffrey (48 Student Credit Hours)					
	Heiser, Bob (66 Student Credit Hours) ²					
	Kohli, Amarpreet (36 Student Credit Hours)					
	Li, Jie (24 Student Credit Hours)					
	Manny, Carter (42 Student Credit Hours)					
	Smoluk, Bert (45 Student Credit Hours)					
	Suleiman, James (36 Student Credit Hours) ³					
	Takeda, Hirotohi (6 Student Credit Hours) ⁴					
	Tharp, Derek (36 Student Credit Hours)					
	Voyer, John (66 Student Credit Hours)					
	Xu, Zhenning (51 Student Credit Hours)					
	Scholarly Practitioner (SP) (3 Student Credit Hours)					
	Palin, Gary (3 Student Credit Hours) ⁵					
	Instructional Practitioner (IP) (90 Student Credit Hours)					
	Ladd, Donald (15 Student Credit Hours)					
	Nelson, Janet (39 Student Credit Hours)					
	Passarelli, Joseph (36 Student Credit Hours)					
	Other (O) (54 Student Credit Hours)					
	Pao, Roger (36 Student Credit Hours)					
	Thibodeau, Anne Marie (18 Student Credit Hours)					

¹ El-Taha, Muhammad

Note: In 2018-2019, had a joint appointment.

² Heiser, Bob

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

³ Suleiman, James

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

⁴ Takeda, Hirotohi

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

⁵ Palin, Gary

Note: In 2018-2019 had interdisciplinary responsibilities in General Management.

⁶ Bilodeau, Richard

Note: In 2018-2019 had interdisciplinary responsibilities in Marketing.

⁷ Rasmussen, Tove

Note: In 2018-2019 had interdisciplinary responsibilities in Marketing.

APPENDIX 16: REVISED SCHOOL OF BUSINESS CURRICULUM

Approved: May 18, 2018

CURRICULUM OVERVIEW

Pre-Business Core

Algebra
Statistics
Microeconomics
Financial/Managerial Accounting
+ Microsoft Excel Certification Badge

*Must complete all above requirements before taking any additional business courses.

Business Core

Marketing
Business Law
Business Analytics
Organizational Behavior
Financial Management
Production/Operations Management

Thematic Core

Technology Management
Entrepreneurial Thinking
Strategic Management of Technology & Innovation
Entrepreneurial Thinking or Technology Course
+ Entrepreneurial Thinking and/or Technology Badge(s)

Students must take 27 credit hours of upper level business courses beyond the core including 3-credits of global business. All students must select a major.

Majors: (15 Credit Hours)

Marketing
Sport Management
Accounting
Finance
Business Analytics
Business Management

Concentrations: (9 Credits Hours)

Entrepreneurship
Risk Management & Insurance
Global Business
Advanced Accounting
Potential for others

*Majors will integrate entrepreneurial thinking and technology content into courses.

PRE-BUSINESS CORE DETAILS

Pre-Business Requirements: (15 credits + Badge)

Algebra (4 credits)—*USM Quantitative Core Requirement*

Stats (4 credits)

Microeconomics (3 credits)—*USM SCA Core Requirement*

Combo Financial/Managerial Accounting (4 credits)

+Microsoft Excel Certification (0 credits)

Criteria for admission into Business School Majors & Minors

- Completion of at least 24 credit hours
- Minimum Overall GPA of 2.75
- Minimum Grade of C+ in All Pre-Business Courses
- Transfers must have a minimum of 24 credit hours; a minimum overall GPA of 2.75 from transferring school; a C+ or better in all Pre-Business courses; and, Microsoft Excel Certification

*All recruitment courses should be at the 100 level

*Students can't take any 200+ level School of Business courses unless they have completed the pre- business core.

BUSINESS CORE & THEMATIC CORE DETAILS

Business Core: (18 credits)

Marketing

Finance Operations Business Analytics

Law—*Potential USM EISRC Core Requirement*

OB

Thematic Core: (12 credits + Badge)

Technology Management Entrepreneurial Thinking

Strategic Management of Technology & Innovation—*USM Capstone Core Requirement*

Technology or Entrepreneurial Thinking Course (can't be major required and cannot double count with major requirements)

+Technology or Entrepreneurial Thinking Badge(s)

MAJORS & CONCENTRATIONS DETAILS

27 Credits:

All students must take 27-credits of upper level business courses (300 or above). All students must select a major. All student must take a global business course--this can be as part of a major, concentration, or as business elective credits. All students can choose to take a concentration or use those additional credits as business electives. No 'double dipping' between majors and concentrations.

Global course (3 credits)—*USM International Core Requirement*

Majors (15 credits-all majors must include/provide at least one 3-cr Technology or Entrepreneurial Thinking designated course as a requirement—*does not double count in the theme*)

- Accounting
- Finance
- Marketing
- Business Analytics
- Sport Management
- Management (admissions suspended until hires to support)—Management major will include two required courses and then the choice of a 9-credit management area concentration

Concentrations (9 credits and open to all majors)

- Entrepreneurship
- Risk Management
- Global Business
- Advanced Accounting

MINOR DETAILS

Entrepreneurship Minor (Only for Non-Business Students)

Pre-Business Core (see credit hour, GPA, and course grade requirements on P. 5)

+

15 Credits

Required Courses:

- Bus 260—Marketing
- Bus 385—Venture Creation
- Bus 485—Managing the Entrepreneurial Venture

Choose two more courses from:

- Bus 386—Creative Strategies
- Bus 383—Social Entrepreneurship Bus 3xx—Entrepreneurial Thinking
- Bus 388—Launching a Global Social Enterprise

Criteria for degree progress and graduation (applies to all major and minor students)

- Students must earn a C+ or better in all Business School courses
- Students must maintain an overall 2.75 GPA
- Students whose GPA falls into the 2.5-2.74 range will be placed on probation with one semester to bring the GPA back above 2.75. Students can still enroll in Business School courses while on the one-semester probation.
- Students whose GPA falls below 2.5 will be dismissed from the Business School majors and minors and not be allowed to enroll in Business School courses. Students can re-enter the school once a 2.75 GPA is achieved.

CERTIFICATE DETAILS

To enroll in a certificate program, students must either:

- Have previously completed an undergraduate degree program, or

- Have successfully completed the pre-business core (see credit hour, GPA, and course grade requirements on P. 5)

PREREQUISITE STRUCTURE

Students must successfully complete the Pre-Business Core and be admitted to the School of Business prior to enrolling in any of the below courses:

Bus 260—Marketing (*C+ required*)

Bus 280—Law (*C+ required*)

Bus 301—Business Analytics (*C+ required*)

Bus 3xx—Entrepreneurial Thinking (*C+ required*)

Bus 340—OB (*C+ required*)

Bus 345—Technology Management (*C+ required*)

Fin 320—Finance (*C+ required*)

Bus 375—Operations (*C+ required—Prerequisite: Bus 301*)

Bus 450—Strategic Management of Technology & Innovation (*C+ required—Prerequisites: Bus 340, Bus 375, Fin 320, 2.75 overall GPA, junior standing*)

NEW COURSE DESCRIPTION DRAFTS

Bus 345—Technology Management

The class will be a mixture of using technology and understanding the business value and transformative impact of technology on business. We will have consistency in tools used and concepts covered.

Learning objectives will include:

- Students will be exposed to programming by participating in the [Hour of Code](#).
- Hands-on exposure to powerful, high-level tools for making computers do amazing things, without the need for conventional programming languages.
- Explain the role of data, information, and knowledge in informing an organization's strategy.
- Identify the components of enterprise information architecture and its strategic role in the organization.
- Understand the transformative impact of technology on standard business practices.

Bus 450—Strategic Management of Technology and Innovation

Focuses on the strategic management of technology-based innovation in the firm. Specific topics include assessing the innovative capabilities of the firm, managing the corporate R&D function, managing the interfaces between functional groups in the development process, managing the new business development function in the firm, understanding and managing technical entrepreneurs, building technology-based distinctive competencies and competitive advantages, technological leadership versus followership in competitive strategy, institutionalizing innovation, and attracting and keeping corporate entrepreneurs.

Bus 3xx—Entrepreneurial Thinking

This course provides students an inside view of how entrepreneurial thinking can be applied in many environments including social ventures, corporations, venture capital and new ventures. Students will develop a basic knowledge of identifying opportunities, assessing required resources, planning and executing an entrepreneurial venture while developing an understanding of value propositions and risks.

NEW LEARNING OUTCOMES DRAFTS

- Students will be able to apply technology to solve a business problem.
- Students will be able to identify and deliver a value proposition.
- Students will understand the opportunities and threats presented by technological disruption.

MICROSOFT EXCEL CERTIFICATION

All students will be required to obtain their Microsoft Excel Certification prior to being admitted to the School of Business. Free online Excel training courses will be recommended to students for preparation. The certification test is administered through Certiport and the cost is \$95. A small review committee should be formed who will obtain their Excel Certification and review online Excel courses for recommendation. The USM School of Business should also become a Certiport testing location.

BADGING

Students will be required to earn at least one entrepreneurial thinking or technology badge and will have the opportunity to earn additional badges. Sample badges might include: Digital/Information Literacy, Career Readiness, Business Writing, Innovation, Internships, Excel, etc. Badges can consist of both academic assessments and co-curricular activities and can be leveled up.

Digital badging is now common within business organizations and a well crafted badging program can increase interest, engagement, and learning; help learners track their progress toward a goal; and enable learners to display their skills and accomplishments for peers and/or employers. See [this article](#) for more detailed explanation of how badging systems can be used effectively.

The badging systems currently being explored integrate with Blackboard and the earned badges can be displayed on student LinkedIn profiles. In addition to faculty created assignments and co-curricular activities, the UMS Academy has content which can be imported into Blackboard for use within classes or as standalone modules to be completed. For instance, UMS Academy offers a Business Writing course which could be completed by students as part of a Business Writing Badge.

The badging systems also provide access to student badging data/metrics which could help support our AOL effort

Badging Examples:

- UMaine is currently using a badging system and offers a badge for [Career Readiness](#) which has three levels.
- [Temple Fox School of Business webinar](#) on how they are integrating and using badging to increase student engagement.
- [Illinois State webinar](#) on their career readiness badging program.

SAP

The School of Business will participate in the SAP University Alliance beginning at the Associate Membership level and transitioning to the Full Membership level within a couple of years. Once transitioned to the Full Membership level, the membership cost will be paid for by charging a lab fee on the courses using the system (~\$8-10 per student).

SAP is one of the major ERP (Enterprise Resource Planning - ERP) software application suites that help organizations integrate their information flow and business processes. What makes this software unique is that it links all the divisions of a company or functional areas such as operations, accounting, human resources management, quality management, and distribution/material management together into one database.

The SAP University Alliances program opens up the world of SAP to more than 3,300-member institutions in 111 countries worldwide, and aims to develop highly qualified graduates with critical skills for the 21st century workforce. Through a community of over 8,000 faculty members, as well as engagement at over 1000+ events annually, the SAP University Alliances Program has inspired over 250,000 students with hands-on experience with SAP solutions annually. In partnership with SAP's 6 University Competence Centers around the world, universities and schools gain access to an ever-expanding range of SAP software and curriculum; enabling faculty to help students better connect business and IT concepts to practice.

Associate Membership:

This is a fast and free way to begin an academic partnership with SAP.

- Access eLearning and desktop software such as SAP Lumira and SAP Predictive Analytics
- Participate in [Idea Place](#) and take advantage of [co-innovation contests and SAP events](#) where students showcase their creativity and skills with SAP, customers, and partners
- Enroll in Massive Open Online Courses (MOOCs) offered by [openSAP](#), such as Introduction to Software Development on SAP HANA
- Use state-of-the-art system demos to underline the use cases taught during lectures using [SAP Business ByDesign](#), [SAP Business One](#) and other Cloud based SAP solutions
- Download and review [University Alliances curriculum](#) to enhance lectures.
- Attend faculty training to experience the curriculum hands-on and to assess the potential for integration in your courses
- Offer the [SAP Learning Hub - Student Edition](#) on your campus, preparing students for today's careers in the SAP ecosystem.

To learn more about the associate membership program, please listen to this presentation: [SAP University Alliances Associate Membership](#).

Full Membership:

If your campus wishes to implement hands-on SAP curriculum in the classroom, then full membership is for you. You get all the benefits of Associate membership plus a free software license for classroom learning, free faculty training, and free hands-on curriculum.

- Students gain hands-on experience with SAP applications, analytics, mobile, database & technology, cloud, and SAP HANA solutions.
- Hosted systems access is provided by a peer University Competence Center. The hosting fee is \$8,000 per year.

To learn more about the full membership program, please listen to this presentation: [SAP University Alliances Full Membership](#).

Value Proposition for Faculty

- Access to world class enterprise applications to use in college courses and programs with no systems administration overhead
- Access to free faculty training and networking opportunities
- Knowledgeable technical and curriculum support
- Ability to integrate curriculum silos through integrated business processes and datasets

Value Proposition for Administrators

- Keeps faculty on leading edge of enterprise technology with shortened learning curve
- Offer students competitive advantage in the job market
- Opportunities to build strong corporate relationships

Value Proposition for Students

- SAP software training, which is used on 80% of all products in the world
- Develop enhanced problem-solving skills
- See process linkages among various functions of a business
- Gain knowledge as to how business processes work
- Be prepared for working with other ERP systems because of similar technology
- Become more marketable to employers because of exposure to SAP applications

Current/new (*) courses that may provide integrated experience:

- Principles of Marketing
- MIS/Technology Management
- Operations/Supply Chain Management (*)
- Combo Accounting
- Accounting Information Systems
- Business Intelligence (*)
- ERP (Enterprise Resource Planning) Systems (*)
- Data Mining for Business Analysts
- Human Resource Management
- Cost Management Systems
- Basic Financial Management

- Sales Order Management (*)
- Customer Relationship Management (CRM)
- Strategic Enterprise Management

SAP America, Inc. and the Member Institution may jointly award a “Student Recognition Award” to students who complete a program of study supported by the mySAP Business Suite.

ADDING MAJORS, MINORS, AND CONCENTRATIONS

Major Criteria

- All majors must be able to make AACSB faculty ratios
- All majors must include at least one entrepreneurial thinking or technology designated course which is required (cannot double count in the theme area)

Minor Criteria

- All minors must be mission focused
- All minors must be built on the pre-business core
- All minors are for non-business majors only

Concentration Criteria

- Cannot be an already existing major (i.e., no general marketing concentration allowed but a specific and focused aspect of marketing would be allowed—sales, digital marketing)
- No ‘double dipping’ between concentrations and majors

EXAMPLES OF POTENTIAL NEW CONCENTRATIONS

- Professional Selling Concentration—9 Credits
- Concentration in Supply Chain & Operations Management—9 Credits

TIMELINE & CHECKLIST

- [x] Create criteria for entrepreneurial thinking and technology designations (May 2018).
- [x] Form small Excel committee (May 2018)
- [x] Form small badging committee (May 2018)
- [x] Decide on badging software—RFP if required (Summer 2018)
- [x] Vote on proposals for new concentrations & minors (October 2018)
- [x] Approve course descriptions for new and changing courses (October 2018)
- [x] Recommend online Excel training course(s) (December 2018)
- [x] Recommendation of 2-3 badges (December 2018)
- [x] Approve any curriculum changes in majors, minors, concentrations (January 2019)
- [x] Become a Certiport testing center (Summer/Fall 2019)
- [] Approve entrepreneurial thinking and technology designated courses from each major (February 2020)
- [] Vote on line requests to support new curriculum—management major and any new concentrations (Fall 2019)
- [] Badging system soft roll out (Spring 2020)
- [] Submit curriculum materials for addition to catalog (February 2020)
- [] Update advising materials—Check Sheet, Graduation Planner, Title IV Forms, Curriculum Map (2019-2020)
- [] Additional 2-3 badge recommendations (2019-2020)
- [] Form small curriculum/academic action committee (May 2020)
- [] Launch new curriculum (September 2020)