

LSC Use Only  
Number: \_\_\_\_\_  
Action: \_\_\_\_\_  
Date: \_\_\_\_\_

UWUCC Use Only <sup>34c</sup>  
Number: \_\_\_\_\_  
Action: \_\_\_\_\_  
Date: \_\_\_\_\_

**CURRICULUM PROPOSAL COVER SHEET**  
**University-Wide Undergraduate Curriculum Committee**

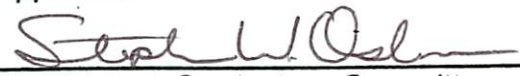
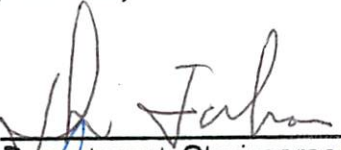
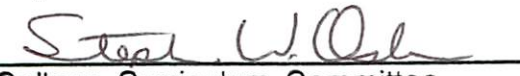

**I. Title/Author of Change**

Course/Program Title: Small Business Planning (ES 403)  
Suggested 20 Character Course Title: \_\_\_\_\_  
Department: Management/Marketing  
Contact Person: Steve Osborne

**II. If a course, is it being Proposed for:**

Course Revision/Approval Only  
 Course Revision/Approval and Liberal Studies Approval  
 Liberal Studies Approval Only (course previously has been approved by the University Senate)

**III. Approvals**

 Department Curriculum Committee	 Department Chairperson
 College Curriculum Committee	 College Dean *

\_\_\_\_\_  
Director of Liberal Studies  
(where applicable)

\_\_\_\_\_  
Provost (where applicable)

\*College Dean must consult with Provost before approving curriculum changes. Approval by College Dean indicates that the proposed change is consistent with long range planning documents, that all requests for resources made as part of the proposal can be met, and that the proposal has the support of the university administration.

**IV. Timetable**

Date Submitted  
to LSC: \_\_\_\_\_  
to UWUCC: \_\_\_\_\_

Semester to be  
implemented:  
Fall 1991

Date to be  
published  
in Catalog:  
Fall 1991

## ES-403 SMALL BUSINESS PLANNING

### PROPOSED COURSE DESCRIPTION

ES-403 Small Business Planning

3C-01-3sh

Prerequisites: Intro to Ent., Small Business Management, Managerial Accounting, Principles of Mgmt., Finance I, Principles of Marketing, Computer Literacy

This course will integrate the content of much of the business core and relate it to business planning for small businesses and entrepreneurial efforts. The student will be introduced to the concepts which will support the development of an effective business plan.

Teaching Method - Text and related Lecture

- Case analysis
- In-class exercises
- Preparation and presentation of a business plan for an existing small business or entrepreneurial concept (small group project)
- Guest speaker(s)

INDIANA UNIVERSITY OF PENNSYLVANIA  
COLLEGE OF BUSINESS

SMALL BUSINESS PLANNING  
ES-403

\_\_\_\_\_ TERM, 199X

REQUIRED TEXT: TBN

OTHER MATERIALS: SBA spreadsheet software  
SBA literature

PREREQUISITES: Intro. to Ent., Small Business Management,  
Managerial Accounting, Principles of Management,  
Prin. of Marketing, Finance I, Computer Literacy

COURSE DESCRIPTION:

Catalog description: "This course will integrate the content of much of the business core and relate it to business planning for small businesses and entrepreneurial efforts. The student will be introduced to the concepts which will support the development, preparation and presentation of an effective business plan."

The business plan is an essential requirement for small businesses and entrepreneurial efforts because they are typically resource limited. Consequently, the business plan serves three critical roles:

- (1) The process of developing a business plan forces the individual/organization to take a critical, objective look at the business opportunity in its entirety.
- (2) The finished product - the business plan - serves as a management tool in developing and operating the business.
- (3) To secure outside financing, whether it be a bank loan or equity investment, in order to create and grow the business.

It is important to focus on both the process of developing a business plan as well as the end product of the process - the completed plan. The plan must be effective both from a content perspective as well as having proper form.

This course will address the process and product (content and form) by relating the concepts of the business core to small businesses and the entrepreneur.

TEACHING METHOD: Text book/lecture/class discussion  
Case analysis  
In-class excercises  
Overhead projector/films/videos  
Guest speaker(s)

STUDENT EVALUATION:

EXAM # 1.....20%  
EXAM # 2.....20%  
CLASS PARTICIPATION.....20%  
FINAL PROJECT (2-3 PERSON GROUPS).....40%

TOPIC OUTLINE

WEEK

1 WHAT IS A BUSINESS PLAN?

WHY IS A BUSINESS PLAN IMPORTANT?

2 HOW DO THE COMPONENTS OF STRATEGIC MANAGEMENT RELATE TO SMALL BUSINESSES AND THE ENTREPRENEUR?

MISSION/BUSINESS CONCEPT  
OBJECTIVES  
STRATEGY  
IMPLEMENTATION  
EVALUATION

3 WHAT ARE THE COMPONENTS OF A BUSINESS PLAN? HOW TO DEVELOP/  
ANALYZE? HOW TO PRESENT?

EXECUTIVE SUMMARY

4 MISSION/BUSINESS CONCEPT  
OBJECTIVES

5 STRATEGY - COMPETITIVE  
- ENTRY (IE ENTREPRENEURIAL START UP, ACQUISITION  
OF EXISTING BUSINESS  
- FRANCHISE  
- MARKET DEFINITION/SEGMENTATION

6 INTERNAL ANALYSIS  
EXTERNAL ANALYSIS/ENVIRONMENTAL ANALYSIS

7 MARKET RESEARCH  
SOURCES OF INFORMATION  
COMPETITOR ANALYSIS

8 CONTINGENCY PLANNING

- 9 PROFORMA DEVELOPMENT (APPLIED SPREADSHEET ANALYSIS)  
CONTROL AND EVALUATION  
ACCOUNTING SYSTEMS  
BUDGETING
- 10 FINANCING PLAN, RISK ANALYSIS, FINANCIAL ANALYSIS
- 11 OPERATIONS PLAN  
ORGANIZATION STRUCTURE/HUMAN RESOURCE PLAN/MANAGEMENT  
PROFILES
- 12 MARKETING PLAN
- 13-
- 14 STUDENT PRESENTATIONS

## COURSE ANALYSIS QUESTIONNAIRS

### SECTION A: DETAILS OF THE COURSE

- A1 The course fills the academic need of preparing the student majoring in Entrepreneurship and Small Business Management Track (E/SB) to develop an effective business plan. While business planning has essentially universal applications in all organizations, the development of such plans is not always a primary function of all members of the organization. By contrast, the business plan is an essential activity of all small business managers and entrepreneurs. There are three essential reasons for this:
- (1) Critical/objective assessment of the business opportunity
  - (2) Create a "blueprint" for development and operation of the enterprise
  - (3) To acquire outside financing

This course will provide the E/SB major with a solid understanding of the business planning process and business plan prior to participating in their internship.

The course is designed only for E/SB majors due to the prerequisites required for the course. Consequently, it will not be appropriate to include the course as a Liberal Studies course option.

- A2 This course does not require changes in the context of existing courses.
- A3 This course will be similar in its approach to several of the advanced level courses in the Management/Marketing Department. The content, of course, will be adapted to the small business and to the entrepreneur.
- A4 This course has not been offered in the past.
- A5 This course will not be dual listed.
- A6 This course will not be offered for variable credit.
- A7 A limited number of regional and national institutions offer E/SB majors this course.
- A8 This course is not required by an accrediting authority. The content of this course is sufficiently comprehensive and critical to a E/SB major that incorporation into another course would be impractical.

SECTION B: INTERDISCIPLINARY IMPLICATIONS

- B1 The course will be taught by one instructor.
- B2 A number of related courses are being proposed in this package to support this new major.
- B3 There is no overlap with courses offered by other departments. There should be no conflicts with other departments to be resolved.
- B4 At this time, no students from the School of Continuing Education will be taking this course.

SECTION C: IMPLEMENTATION

- C1 Resources for this course are currently available in the Management/Marketing Department.
- C2 This course is not intended to be supported by a grant although such support may be available.
- C3 This course will be offered during the Fall and Spring semesters.
- C4 We expect to initially offer 1-2 sections per semester, dependent on student demand.
- C5 The sections of this course will accommodate 20-25 students. This limitation is based on the need to involve the students in group discussions, experiences and projects, not by resource limitations per se.
- C6 Professional societies do not explicitly recommend enrollment limits for this course.
- C7 This course will be required of all E/SB majors. This proposed new major will require the same business core that other business majors are currently taking. The major requirements will equate to the same total credits as current business majors with existing majors. Consequently, the free electives available to the students and the 124 credits required for graduation will not be affected.

SECTION D: MISCELLANEOUS