

E-MOMENTUM

THE SMALL BUSINESS INSTITUTE® ASSOCIATION NEWSLETTER

MAY 2004

The President's Corner - Message to all Members

Greetings SBI Members and Friends!

As I indicated, in the last issue of E-Momentum, your SBI Board is working on a number of programmatic and procedural improvements. Leo Simpson, VP Case Competition, is spearheading one of the key improvements and you should have received a questionnaire about the Case of the Year (COY) program. If not, the key questions are discussed in this issue of E-Momentum. I would ask each of you to take some time to read, consider the questions, and respond to Leo about the program. The COY program is one of the signature elements of the SBI program and we need to consistently strive for improvement in program participation and quality.

Additional changes and improvements will be presented to the membership, within the next few months. As indicated at this year's conference, the Executive Board will be meeting to review and revise Board position descriptions and to review and propose updates & amendments to the SBI bylaws. It has been several years since the organization has had a thorough review of Board position descriptions and the bylaws and the time is right for us to conduct that review.

In the last E-Momentum, I indicated that your Board was taking steps to make several contact regarding gaining sponsorship(s) and/or financial support for the SBI program. As a status report, we are actively working on identifying appropriate governmental and private sources and will a select number of Members will be making visits to those sources within the next few weeks. I will include another status update in the next edition of the E-Momentum.

And last, by now you should have received the flyer for the 2005 USASBE/SBI Joint Conference. I know that Shawn Carraher and Howard Van Auken are working very hard to put together an exciting and informative conference. Please plan on submitting a paper or workshop proposal and by all means, register early!

As always, my thanks for your participation in and support of the SBI!

Enthusiastically,

J.N. Bradley

Membership Update:

*As of May 1, 2004, the SBI Association is 135 members strong and growing! If your courses involve a field case pedagogy, you owe it to yourself to be involved in the organization that focuses on your issues. **Join the Small Business Institute® Association today.** See the membership form on page 4 in this issue of E-Momentum.*

Reminders: Go to the SBI Association website, www.smallbusinessinstitute.org, for a list of current officers, past issues of E-momentum, and much more. Have info for the September issue? Contact Ron Cook at cookr@rider.edu.

Important Deadlines:

- 1) August 13, 2004 - 2005 Conference submissions due (see page 5)
- 2) Last Friday in August 2004 - COY submissions due to Leo Simpson (see page 2)
- 3) August 30, 2004- End of Year SBI reports due (see page 3)

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SOLICITATION FOR INPUT ON CASE OF THE YEAR COMPETITION (COY)

The COY competition has always been an opportunity for our students to receive recognition for their excellence in preparing their reports. The Executive Committee is soliciting your feedback to improve the competition. It is our goal to improve some elements for this year's competition, and any major changes will be announced this year for implementation in next year's competition.

If you wish to offer suggestions as to how the competition should be held, we would appreciate your input. We need your comments by **May 31, 2004**. As we will classify your input into a topical area, it would help if you could put your suggestion into this topical area as you submit it.

We will do our best to include all opinions, but we know that some opinions are diametrically opposed. Our intent is to increase the number of participants, provide a fair and equitable process, and make the awards rewarding to our students, directors, and stakeholders. If your idea does not fit into a category, please use the final "Other" category and define the issue as well as your suggestion. Thank you for your participation.

Category 1 Standards

The criteria for excellence do not seem to represent the true value we are trying to provide the business and our students. What are we trying to achieve and how can we measure it?

- Criteria
- Priorities
- Evaluation Form
- Other Standards

Category 2 Categories for Judging

Graduate Comprehensive (two or more major functional areas)

- Graduate Specialized (specific topic to comprehensive analysis of one functional area)
- Undergraduate Comprehensive (see above)
- Undergraduate Specialized (see above)
- Other

Rookie (first submission within 4 years unless prior national 1st or 2nd place award ever won)

Community Development or Economic Development (some studies are not for specific businesses)

Category 3 Judges

There have been criticisms regarding the ethics of judging our own projects as we might not objectively evaluate cases impartially based on the criteria, etc.

Potential Sources for Judges—SCORE; Business Leaders; Consultants; SBDCs; SIFE; NFIB; YEO (Denver based consultants or something like this)—other

- Procedures for selection
- Procedures for judging

Category 4 Methodology

There have been some discussions about the efficacy of continuing the district structure for competition. Some have suggested we move away from district competition and have a national competition with more awards—such as first, second, third and honorable mention if the case achieves an established minimum level of quality. Many universities would regard an honorable mention at the national level ahead of a district win for example. Also, the competition within districts is uneven, and changes over time as the SBIA membership changes. Another area of discussion involves the number of categories and number of awards a single university can win.

Category 5 Awards

This category involves the actual process of giving the awards. Early notification to allow more student participation at the National Conference, more recognition for award sponsors such as SIFE, other.

Category 6 Timing

Since our conference will be held with USASBE for the next few years at least, the national SBI conference and the presentation of the awards will be one month earlier. If we do not have district competitions, we could still hold to the current submission deadline in August. If we decide to continue the district competitions, the date for submission will have to be moved up.

Category 7 Process Issues

There has always been the issue of to what extent did the students actually do the report. Should the process certify that the students did the report with the oversight of their professor, and did not receive help from consultants, graduate assistants, or other professors directly in the writing of the report. Actual phrasing of this and what to include to make this statement complete is open to suggestion.

Category 8 Enforcement

There needs to be a mechanism in place to impose penalties or disqualification in situations of violation of the rules. Suggestions?

Category 9 Other Issues Not Fitting Into Categories 1-8

Please send your comments to Leo Simpson, VP of Case Competition, Leo.simpson@wku.edu
Thank you for your input!

(Reminder: Submit cases completed in 2003-04 academic year for the COY competition to Leo Simpson by the last Friday in August.)

Certified Small Business Counselor Program (CSBC)

The CSBC was approved by the SBI Association in 1999, and is administered by the VP for Quality Assurance. CSBC is good for a 4 year period.

The Certified Small Business Counselor program is designed to raise the standards of its members, enhance performance of Small Business Institute® Directors and Case Supervisors, and recognize those who have reached a higher level of knowledge within the small business counseling field. The CSBC Counselor program has these main goals:

- 1) To create a common body of knowledge and standards of performance for small business counselors
- 2) To enhance the professionalism of SBI members/small business counselors
- 3) To offer members a self-directed venue for taking an active role in their own professional development

In brief, the SBI Association awards Professional Development Units (PDUs) for learning experiences that increase the skills and abilities of participants. Participants

accumulate 50 PDUs from six required categories during the 4-year certification period, as follows:

- at least 8 PDUs from the category of Conferences and Workshops;
- at least 3 PDU's from the category of Field Case Supervision and/or Small Business Consulting;
- at least 4 PDUs from the category of Professional Membership;
- at least 6 PDUs from the category of Professional Development;
- and at least 2 PDUs from either the category of Presentations OR Publications/Articles.

The first class of CSBCs was awarded certification at our national conference in 2001. This is a reminder to all original CSBC counselors that 2004 is their renewal year and if they wish to be renewed, they need to submit the CSBC information, per our website. For further details, contact the current VP of Quality Assurance, Bruce Kemelgor, bhkeme01@louisville.edu

Small Business Institute® End-of Year Report

Please assist your national SBI organization in gathering data on how we are helping economic development in our communities and regions. This annual report is one way that the Small Business Institute® can advocate for support from policy makers/government. We can also reflect upon the quality of our programs by seeking your cooperation in reporting your program's activity to SBI each year. Thank you, in advance, for your assistance. This year's report should be completed by 8/30/04 for SBI projects completed from July 1, 2003 through June 30, 2004.

University/College: _____

SBI Director: _____ Phone: _____

SBI Case/Project Data:

Number of total firms/organizations served: _____

Number of total SBI Cases completed: _____

Total number of students participating in SBI projects: undergraduate _____ graduate _____

Total student hours generated for all completed SBI projects: _____

SBI Case Documentation: Please initial that the following documents are maintained in your records as specified in the SBI Program Guidelines

_____ A written case report, signed by the client, for each completed SBI project noted above.

_____ A project proposal/letter of engagement for each completed SBI project noted above.

_____ A confidentiality agreement signed by both the client and students for each SBI project.

_____ An activity log of student hours for each completed SBI project as noted above.

_____ A signed client acknowledgement form for each completed SBI project report as noted above.

Please check all that apply:

Cases were addressed through:

_____ a course devoted to SBI fieldwork

_____ a joint effort with a local SBDC

_____ an assignment as part of another course

_____ a joint effort with an entrepreneurship center

_____ a faculty team (2 or more) collaborative effort with each SBI team

Signature of SBI Director: _____ ,

PLEASE submit this form by August 30, 2004 to the V.P. of Quality Assurance, Bruce Kemelgor, bhkemeol@louisville.edu
(email Bruce or see the website, www.smallbusinessinstitute.org, if you have questions)

SBI Association Membership Form

Name _____

Institution _____

Address: Street _____

City _____

State / zip code _____

Is this address your **Office** or your **Home** ? (check the appropriate box)

Phone: _____

FAX: _____

Email Address _____

www site: _____

Primary Teaching Area(s) _____

Secondary-Teaching Area(s) _____

Research Interest: _____

Newspaper (school) _____ (local) _____

Small Business Case Writing Interest? Yes No Mentor Interest? Be one Use one

Does your institution have an active SBI program? Yes No

If yes, do you use undergraduate students

Graduate students

Both

Membership Fee

United States and territories \$100.00

International \$125.00

Emeritus/Student \$ 50.00

Membership Category

serve as SBI Director

serve as SBI Case Supervisor

do not work with SBI, but interested in small business

Membership Status

(please indicate whether membership is ...)

Full (faculty, retired faculty, small business

employee or owner, government employee)

Associate (student)

Membership Type:

First time

Renewal

Renewal with changes (i.e. address, etc.)

Please return this form and your membership fee (check made payable to SBIDA) to

SBI Membership Office

P.O. Box 10175

Conway, AR 72034.

Call For Papers and Workshops



USASBE/SBI National Conference
January 13-16, 2005
Renaissance Esmeralda Resort & Spa
Indian Wells, California

Deadline for Submissions: August 13, 2004

ENTREPRENEURSHIP IN A DIVERSE WORLD

We invite you to submit papers, case studies, workshop or symposia proposals that deal directly or indirectly with:

- Entrepreneurship Education
- Individual Entrepreneurship
- Minority and Women Entrepreneurship
- Small Business
- Technology Entrepreneurship
- Family Business
- Corporate Entrepreneurship
- International Entrepreneurship
- Entrepreneurship in the Arts
- Entrepreneurship Across the Curriculum
- Entrepreneurial Support Organizations
- Accounting and Finance Issues
- Community Development, Outreach and Fundraising Issues
- E-Business, Information Systems, and Technology Issues
- Free Enterprise Issues
- Management and Marketing Issues
- Entrepreneurial Consulting
- Social Responsibility, Legal and Environmental Issues
- Teaching Cases
- Poster Sessions (for Works-In-Progress)

Plus other topics of interest and value to the membership of USASBE/SBI. Keep in mind the "so what" question in relation to your contribution to the field. We encourage electronic submissions.

Contact Information

Workshop/Symposium Chair
Dr. Jon Richards
Southwestern Oregon
Community College
Business Development Center
2455 Maple Leaf Lane
North Bend, OR 97459
Phone: 541-756-6445
Fax: 541-756-5735
Email: jonbdc@uci.net

2005 Program Chair
Dr. Howard Van Auken
Iowa State University
300 Carver Hall
Ames, IA 50010
Phone: 515-294-2478
Fax: 515-294-2534
E-mail: vanauken@iastate.edu

Competitive Papers
Chair/SBI Chair
Dr. Shawn Carraher
Texas A&M University
Commerce
Dept Of Marketing & Mgmt
PO Box 3011
Commerce, TX 75429
Phone: 903-886-56%
Fax: 903-886-5702
Email:
shawncarraher@tamucommerce.edu