

California State University Channel Islands
BUS/ECON/SOC 301 Social Business Planning
Course Syllabus

Instructor: Maria Ballesteros-Sola, DBA, MBA
Class Meetings: Thursday 9:00 am – 11:50 am
Office: Sage Hall 2153
Visiting Hours: Thursday 8.00 am – 9.00 am or by appointment
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"There is certainly no conflict between the responsible pursuit of profit and the service of social goals [...]. The choice is yours."
M. Yunus

Business Program Learning Goals (PLG)

1. Critical Thinking
2. Oral Communication
3. Written Communication
4. Collaboration
5. Conduct (Ethics)
6. Competency in Discipline

Student Learning Outcomes

Social business is a cause-driven business. It is as social as it is a business and that requires the convergence and adaptation of traditional fields of study. Due to the "under construction" nature of the subject I see this class as exploratory in nature and I envision myself as a facilitator or a coach to help you move your business idea forward. The focus in this class changes from the conceptual understanding of a social business (203 class) to the practical approach of planning and building a social enterprise. You will have to roll your sleeves up!

We will develop the skills and perspective that enable a social entrepreneur or nonprofit organization to identify and understand a social problem, to generate creative earned income ideas to address it, and to build a realistic social business plan.

We will introduce the basics of business planning using a hands-on methodology. Students will learn to move a social business idea from conception to market.

After successfully completing the course, the students should be able to:

- Outline the major steps in the diagnosis of a social problem. (PLG 1,6)
- Explain the elements of a social business plan. (PLG 1,6)
- Critique a social business plan based on concepts learned in the course. (PLG 1,6)
- Understand and use specific business planning vocabulary (PLG 1,6, 2,3,6)
- Propose and develop a unique social business plan (PLG 1,6)
- Understand current affairs in the social business arena (PLG 1,6)

Other critical course objectives are team building, focused and precise business writing, public speaking and presentation skills, and proficiency in Microsoft Power Point, Excel and Word or alternative Google Docs. (PLG 1,2,3,4)

These objectives will be achieved through a mix of lectures and discussion, writing assignments, guest speakers and a semester-long service learning group project.

Required materials

“Managing the Double Bottom Line: A business planning reference guide for social enterprise” by Sutia Kim Alter (2000). Free digital copy at: <http://www.virtueventures.com/resources/mdbl>

“Business Model Canvas for Social Enterprise Design” Ingrid Burkett (2015) Free digital copy at: <https://mbs.edu/getmedia/91cc0d01-3641-4844-b34c-7aee15c8edaf/Business-Model-for-SE-Design-Burkett.pdf>

“Strategic Tools for Social Entrepreneurs” Dees, Emerson, Economy, (2002). Wiley & Sons - only Chapter 9 – available in CI Learn

“Building Social Business” by M. Yunus (2010), Public Affairs. NY.

“Creating a World without Poverty” by M. Yunus (2007), Public Affairs. NY.

Additional readings as posted on CI Learn and handed out in the classroom.

Optional reading

- “Business Planning for Enduring Social Impact” by Andrew Wolk & Kelley Kreitz (2008). Root Cause, Cambridge, MA. Free digital copy at:
 - <http://www.rootcause.org/resources2/business-planning-for-enduring-social-impact-a-how-to-guide>
- “Enterprising Nonprofits” by Gregory Dees (2001). Wiley Nonprofit series.
- “The Social Entrepreneurs’ Playbook” by MacMillan and Thompson (2013). Wharton Digital Press
- “The Young Entrepreneur’s Edge” by Jennifer Kushell (1999). Random House, Inc.
- “Managing the Non-Profit Organization” by Peter Drucker (1990). HarperCollins.
- International Journal of Social Business (JISB)
- Stanford Social Innovation Review (SSIR)

Prerequisites: BUS/ECON/SOC 203 Intro to Social Business

Grading

Attendance (individual)	50
Class Participation (individual)	75
Homework (25 x3)	75
Pop – up Quiz (individual)	25
Mid-Term (individual)	125
Final Exam (individual)	250
Term Project (group)	350
Journal (individual)	50
	1000

Grading related issues

Final grade will be calculated on the weighted value of all components. Final grades will be given on the basis of the guidelines provided by school. The professor reserves the right to change the method for determining course evaluation at any time.

A+: 1000-980	A: 979-930	A-: 929-900
B+: 899-880	B: 879-830	B-: 829-800
C+: 799-780	C: 779-730	C-: 729-700

D: 699-600	F: <600	
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General CSUCI policy on grades. (<http://senate.csuci.edu/policies/2012-2013/senate-policy-12-07.pdf>)

A	Student performance has been outstanding and indicates an exceptional degree of academic achievement in meeting learning outcomes and course requirements
B	Student performance has been at a high level and indicates solid academic achievement in meeting learning outcomes and course requirements
C	Student performance has been adequate and indicates satisfactory academic achievement in meeting learning outcomes and course requirements
D	Student performance has been less than adequate and indicates deficiencies in meeting the learning outcomes and/or course requirements
F	Student performance has been unacceptable and indicates a failure to meet the learning outcomes and/or course requirements

Attendance

Grading for this section will be based on **attendance** and **punctuality**.

Only one undocumented absence will be allowed during the semester.

Each additional undocumented absence will result in a 10-point penalty deduction from your attendance grade up to three unexcused absences (-30 points). Students that miss more than 4 classes without proper documentation will not pass the class.

Missed Classes: When you miss a class, you are responsible for obtaining any notes, handouts, additional reading materials, or assignment changes from your classmates or from CI Learn. Please check first with them.

For absences with extenuating circumstances related to a medical condition or disability for which you may require reasonable accommodation, please refer to the Disability Statement.

Students are expected to arrive to class on time. Three late arrivals will count as one undocumented absence.

Class Participation

You are expected to come to class with the assigned readings completed and fully prepared to participate in the discussion. Therefore **preparedness, your contributions** toward advancing class discussion, and generally **fostering learning among peers**, will count toward your class participation grade.

Class participation¹ provides the opportunity to practice speaking and

¹ Note: I obtained these guidelines directly from Dr. Caserta-IE Business School (source: Caserta, 2013 – Quantitative Methods – Syllabus). In turn, these have been learned from someone else. Although the original

persuasive skills, as well as the ability to listen. Comments that are vague, repetitive, unrelated to the current topic, disrespectful of others, or without sufficient foundation will be evaluated negatively. What matters is the quality of one's contributions to the class discussion, not the number of times one speaks.

Outstanding Contributor: Contributions in class reflect exceptional preparation. Ideas offered are always substantive; provide one or more major insights as well as direction for the class. Challenges are well substantiated and persuasively presented. If this person were not a member of the class, the quality of discussion would be diminished markedly. **Grade: 75 points**

Good Contributor: Contributions in class reflect thorough preparation. Ideas offered are usually substantive; provide good insights and sometimes direction for the class. Challenges are well substantiated and often persuasive. If this person were not a member of the class, the quality of discussion would be diminished. **Grade: 60 points**

Adequate Contributor: Contributions in class reflect satisfactory preparation. Ideas offered are sometimes substantive, provide generally useful insights but seldom offer a new direction for the discussion. Challenges are sometimes presented, fairly well substantiated, and are sometimes persuasive. If this person were not a member of the class, the quality of discussion would be diminished somewhat. **Grade: 50 points**

Non-Participant: This person says little or nothing in class. Hence, there is not an adequate basis for evaluation. If this person were not a member of the class, the quality of discussion would not be changed. **Grade: 10 points**

Unsatisfactory Contributor: Contributions in class reflect inadequate preparation. Ideas offered are seldom substantive; provide few if any insights and never a constructive direction for the class. Integrative comments and effective challenges are absent. If this person were not a member of the class, valuable airtime would be saved. **Grade: 0 point**

Students are expected to bring their laptops, tablets or smartphones to class and use exclusively for class activities.

Homework

attribution for the guidelines has been lost, they continue to be so useful to so many.

Homework will be assigned during the semester and will be graded as pass or fail. Failure to submit a homework assignment will result in a 25-point penalty deduction from your homework grade (per missed assignment).

Homework will be uploaded to CI Learn the night **before class (11.59 pm)**. If you attach a file be sure to include your last name in the name of the file and the class (for instance: BUS301_ballesteros_HW1). If you are not attending the class, be sure you submit it via CI Learn **prior to the class**. No exceptions, **late assignments are not accepted**.

Exams & Quizzes

The Mid-Term will serve as a check-up of your progress. Also it will give you an idea of what to expect on the Final. The format will be a mix of multiple choice questions, topic questions and mini-case analysis. No make ups exams will be given.

Quizzes may be given randomly through the semester with or without notice. If you do not come to class that day your score will be 0.

Journal – Self Reflection Analysis

Writing the Self Reflection Journal will help you to document your growing knowledge of social business and planning and your service learning experience. I encourage you to write your online journal entry right after each class.

The journal can be used to capture ideas about the social business plan that you are developing. You will also find it helpful for recording group dynamics, main obstacles found, reflections about your entrepreneurial experience and the service learning component, etc.

It should become a personal lesson learned exercise that will help you to prepare for the Final, and also in future projects.

I will be the only person who will read the journals. I expect you to be open, honest and provide constructive feedback.

Journal entries will be written weekly on the designated area in CI Learn. Students with 12 entries or more will be awarded full points. No partial credit. If you miss a class, just write so in that week entry.

Service Learning Team Project: The Social Business Plan

In the “Introduction to Social Business” class you learned about different organizations using market- based solutions to address social issues (recall our weekly “SB in the News” exercise). In this service-learning project, you would have the opportunity to work with a local Community Partner (CP) and write a business plan that analyzes the viability of a social enterprise.

Is this your first service learning experience? No worries but please check this URL <http://www.csuci.edu/servicelearning/studentresources.htm>

Objective

The core objective is to build a social business plan based on previous or new earned income idea. Working with a Community Partner, each team will analysis the social problem there are trying to address and the feasibility of the proposed new social enterprise. The teams will also design the strategy and related tactics in order to move it from idea to reality.

Students are expected to have the hands-on experience that entrepreneurs go through, and to apply the learning and insights gained in the classroom. It gives you an opportunity to advance your understanding of social problems, to develop a viable solution and to design a marketing strategy and a financial model. It will also help you to understand the differences between a traditional business planning and social business planning. Basically, you will think and act as a social entrepreneur while helping our Community Partners to advance their social enterprises.

As in the “Intro to Social Business” class, the project should be also used as an opportunity to build upon “soft” skills that will always be useful in different aspects of your future career, such as

- team building & team management
- running effective meetings
- developing leadership skills
- using effective feedback
- speaking in public
- writing effectively: remember in this class you will be generating business documents so business writing will be required.

I expect the students to work hard on the project, but also to have fun and enjoy the experience. I will be looking for opportunities to submit your social business plans to (social or not) business plan competitions. Stay tune!

Team Size: Teams will be self-formed of 3-4 per team. I reserve the right to make changes in the team compositions if there is not a good balance of backgrounds and skill sets amongst the teammates.

Deliverables

Deliverables will be submitted at the beginning of the class that they are due, except the team composition. Submit printed documents with your name shown prominently. Each team will have 3 minutes to do an "Elevator Pitch" of the deliverable. This oral presentation will not be graded.

Details of each deliverable will be provided in CI Learn during the semester.

Team Project deliverables are identified on the Tentative Schedule Section in this syllabus with the initials **TP**. The Final Deliverable's grade will be adjusted based on **peer-review**.

	Deliverables	Points
0.	Team Proposal : Team members & team coordinator (names, emails and phones). Get a catchy team name.	0
1.	First Deliverable : CP's profile, social issue, business concept, vision/ mission, environment/industry analysis, market research (5-page max. + appendices) Elevator Pitch	50
2.	Second Deliverable : Product/ Services, Marketing, Operations. <u>Max 10 pages</u> . Elevator Pitch	100
3.	Final Report (Executive Summary on PowerPoint "The Deck" + Word Document including reviewed Deliverable 1, 2 + Management, Financial Plan, Legal, Social Impact Measurement - <u>Max 25 pages</u>)	200

Final Presentation

The team will present their Executive Summary (Power Point) in front of the class on the day assigned. Oral presentation should not be longer than 15 minutes. All team members are expected to speak in the presentation. After the presentation, a 5-minute Q&A will be opened. Community Partners have been invited to attend the final presentation.

Final Report: The Social Business Plan

The final Social Business Plan will include a Word document, no more than 25 pages long plus the Executive Summary plus any additional exhibits.

Part of the content has been developed through the semester so I expect that by the end of the semester the biggest workload will be on the financials, legal aspects and social impact measurement.

Peer-review

After the final presentation, each team member will grade each of his/her team members in a scale from 0-100%. The objective is to evaluate your teammates' work. You will consider each of your teammate's efforts, commitment to the success of the project, and contribution to the final results, critical thinking, availability, dependability to get their work completed on time, assistance to other team members, conflict mediation and any other variables you believe were critical during the semester for a successful outcome.

Your final grade for your final Social Business Plan will be adjusted with your peers' score, but I will also seek formal feedback from our Community Partners' project managers.

The following schedule of assignments is subject to change with notice.

TENTATIVE SCHEDULE

Legend:

- **MDBL:** Managing the Double Bottom Line
- **BSB:** Building Social Business
- **HW:** Homework
- CWWP:** Creating a World Without Poverty
- TP:** Team Project

#	DAY	SUBJECT AREA	REQUIRED READINGS	DELIVERABLE BEFORE CLASS	IN – CLASS ACTIVITIES
1	08/30	Introductions & Course Overview UNIT 1: Review YSB & overlapping concepts Focus on NPO/EIS	CWWP: Chap. 1 & 2 (re-read) Alter's Paper		Ice breaker Review SE, CSR and Nonprofit/EIS "Business" Planning for Social Enterprise" – Alter Dissecting a SBP
2	09/06	UNIT 2: Planning Overview	Dees: Chap. 9 (e-reserves) MDBL: Ch.1 BSB: Ch. 3 (re-read)	Readings summaries Journal entry HW 1: Entrepreneur Interview TP: groups due	Community Partners Presentations
3	09/13	UNIT 3: Market Research (I) Target Market/ Market Opportunity	MDBL: Ch. 3	Readings summaries Journal entry HW 2 (A): Questionnaire	
4	09/20	UNIT 3: Market Research (II)			
5	09/27	UNIT 4: Vision/ Mission/ Environment / Industry Analysis / Competition	MDBL: Ch. 2 & 4	Readings summaries Journal entry	
6	10/04	Professor in conference – online class HW 3: Industry Analysis & Journal entry			
7	10/11	UNIT 5: Marketing Strategy (I)	MDBL: Ch. 3 & 5	HW 2 (B): Market Research Report Journal entry Readings summaries	
8	10/18	MIDTERM & Team Project: Deliverable I Public Speaking – Coaching Session & Elevator Pitch K.I.S.S. – Feedback exercise			
9	10/25	UNIT 6: Operations Plan UNIT 7: Management Plan	MDBL: Ch. 6&7	Journal entry Readings summaries	
10	11/01	UNIT 8: Financial Plan & Funding	MDBL: Ch. 5 (pricing) & 8	Journal entry Readings summaries	
11	11/08	UNIT 8: Financial Planning & Funding (II)	MDBL: Ch. 5 (pricing) & 8	Journal entry Readings summaries TP: Deliverable II Elevator Pitch	
12	11/15	UNIT 9: Legal	BSB: Ch. 5 Article on CI Learn	Journal entry Readings summaries	
13	11/22	THANKSGIVING DAY – Campus Closed			

14	11/29	UNIT 10: Action Plan	Journal entry
15	12/06	TEAM PRESENTATIONS: "The Deck" - Final Business Plan, Peer Review,	
16	12/13	FINAL EXAM & Final (DEAL) Journal entry	

In- Class Protocol: Cell phones and pagers are allowed in class only when they are silent/vibrate. If you need to answer an urgent call please leave the room. If your cell phone disturbs any part of the class you will be asked to leave the class and lose any points associated to that day. No exceptions.

Laptops are not allowed in the class unless you are using it to take class notes or to do in-class exercises or research. Students using a laptop to take class notes must **sit in the front row**. No exceptions.

No-headphones allowed in class.

Cheating, Plagiarism and Other Forms of Academic Dishonesty

All work that students submit, as their own work must, in fact, be their own work. In accordance with CSU Channel Islands policy on academic dishonesty, students in this course who submit the works of others as their own (plagiarize), cheat on tests and examination, help other students cheat or plagiarize, or commit other acts of academic dishonesty will receive appropriate academic penalties, up to including failing the course.

Papers with plagiarized ideas or language will be graded "F" and must be rewritten with proper use of quotations and referencing. The grade of "F" (=0) will remain the recorded grade on the assignment.

The Internet is a great source of information and I encourage you to use it for research. However, do not copy another author's writing word for word, except for brief passages to support your thesis. When using another writer's work, accurately identify it with a proper citation and footnote.

Plagiarism or cheating on test and exams will results in an "F" (0 points) on the test or exams, very likely resulting in a lower or possibly a failing final grade in the course. To complete course requirements, students must retake the test or exam during the instructor's scheduled office hours.

Plagiarism on homework or project deliverables will result in 0 point grade for that document. Be aware that plagiarism on one of the project deliverables will be result in a 0 for the whole team so please be sure to

review the deliverable accordingly and do not tolerate any doubts on the authenticity of the submitted materials by any team member.

In case where the cheating or plagiarism was premeditated or planned, students may receive and “F” for the course.

Disabilities Accommodations

If you are a student with a disability requesting reasonable accommodations in this course, please visit Disability Accommodations and Support Services (DASS) located on the second floor of Arroyo Hall, or call 805-437-3331. All requests for reasonable accommodations require registration with DASS in advance of need. You can [apply for DASS services here](#). Faculty, students, and DASS will work together regarding classroom accommodations. Please discuss approved accommodations with me ASAP!

Campus Tutoring Services

You are encouraged to make regular use of campus tutors and/or peer study groups, beginning in the second week of the semester. For campus tutoring locations, subjects and hours, go to: <http://go.csuci.edu/tutoring>.

Civil Discourse Statement

All students, staff and faculty on our campus are expected to join in making our campus a safe space for communication and civil discourse. In 2016, CI faculty (through the Academic Senate) voted to approve Resolution SR 16-01 titled, “Commitment to Equity, Inclusion, and Civil Discourse within our Diverse Campus Community.” If you are experiencing discomfort related to the language you are hearing or seeing on campus (in or out of classes), please talk with a trusted faculty or staff member. Similarly, please consider whether the language that you are using (in person or on canvas) respects the rights of others to “engage in informed discourse and express a diversity of opinions freely and in a civil manner.”

Emergency Intervention and Basic Needs Statement

As CI’s website points out, “a recent study commissioned by the CSU Chancellor’s Office shows that nearly 25 percent of CSU students either regularly skip meals for financial reasons or lack access to toiletries and sufficiently nutritious food options. In addition, more than 10 percent are displaced from their homes due to things like an unexpected loss in

income or personal safety issues." If you recognize yourself, or someone you know from this description, please know that there are resources on campus to help, including the **Dolphin Food Pantry** for students which offers free food, toiletries and basic necessities. The Dolphin Pantry is currently located in Arroyo Hall, Room 117 and is open Monday – Friday 8:30 – 4:30 (please check <https://www.csuci.edu/basicneeds/> for updates). **Emergency housing and funds** are also available.

Finally, I am personally involved with our **Career Closet**. If you need free business clothes for an interview or networking event please contact me via email.

Disclaimer

Information contained in this syllabus, other than the mandated by the University, may be subject to change with advance notice.

Final Thoughts

This class and all that we strive to accomplish are about you and for you! Class is the safest laboratory that you will experience in your career. Make the most out of it! Work hard and have fun! Thank you for choosing this class. I am looking forward to working with you.

"Inspiration exists, but it has to find you working."

Pablo Picasso