



**BUSI 4304**  
**Procurement and Contracting**  
**Winter 2017**

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**COURSE MATERIALS:**

Robert M. Monczka, Robert B. Handfield, Larry C. Giunipero, and James L. Patterson, 2011, Purchasing and Supply Chain Management. (5<sup>th</sup> Edition). Cengage South-Western, Mason, OH.

**CALENDAR DESCRIPTION:**

Core supply chain procurement processes in the private and public sectors involved in the acquisition of goods and services, including sourcing, purchasing, contracting, supplier collaboration and relationship development and management. Emphasis on concepts, principles, practices, and techniques.

**PREREQUISITES:**

Third-year standing; BUSI 2301 with a C grade or higher.

**COURSE OBJECTIVE**

The course addresses core supply chain procurement processes in the private and public sectors, including sourcing, purchasing, contracting, supplier collaboration, relationship development and management, etc. Emphasis will be placed on concepts, principles, practices, and techniques related to purchasing and contracting.

**CLASS CONDUCT**

The class time will be taken up by lecturing from the course instructor as well as case studies, exercises, and games. Much of the time will be devoted to the discussion of concepts, cases, and

problems. You are expected not only to attend class, but also to be prepared to discuss the problems and exercises on the day assigned. Be sure to bring a laptop, and your textbook to class with you at all times.

### **ATTENDANCE AND PARTICIPATION**

Attendance and Participation is integral part of this course. Attendance in the class will be recorded. The students need to attend at least 8 classes (excluding the first class) and sign the attendance sheet in order to get full attendance points (5% of the total grade).

**MARKS ALLOCATIONS:** credit for the course will be based on the evaluation items outlined below.

<b><u>Evaluation Item</u></b>	<b><u>Mark</u></b>
Attendance	5
In-class test	15
Group Case write-up	25
Group presentation and response to comment	15
Purchasing policy exercise	5
Supply chain negotiation game	5
Individual case analysis	30
<b>Total</b>	<b>100</b>

### **IN-CLASS TEST**

There will be one in-class tests that cover material related to pricing.

### **IN-CLASS EXERCISE**

There will be one in-class exercise on developing purchasing policy.

### **SUPPLY CHAIN NEGOTIATION GAME**

The supply chain negotiation game is a role-playing game where the retailer and wholesaler roles are assigned to student groups. The groups negotiate supply contracts in a number of rounds during a class period. Each group makes pricing, inventory, and ordering decision concurrently, and competes with others to achieve the highest profit.

### **THE CASE METHOD**

Teams will be assigned at the beginning of the semester and these teams will remain throughout the semester. Each team will be responsible for presenting assigned cases to the class. The members of non-presenting teams need to actively participate in the class discussion.

### Case write-up

To prepare for the case presentations, the team needs to become the "expert" on your assigned case study. As a group, you should prepare a case write-up. The expected length of the write-up is 5-10 pages (in addition to any exhibits). It should be single-spaced, with normal margins and *Times New Roman 12 font*. The cover page should include the names of team members, name of the case, date, and title of the case. While the format of the write-up may vary depending on the nature of the cases, it normally includes (1) A statement of core problems or issues of the case; (2) Analysis of key challenges facing the focal company. And (3) Your recommendation as to which actions should be taken.

To assist the team to write the write-up, the instructor offers several assignment questions for each case. **The team needs to answer these questions in the case write-up.**

The team may book an appointment with the instructor before the case presentation. The instructor will help the team to verify their ideas and answer any questions that may arise when the team prepare for the case presentation.

**The team needs to upload a draft of case write-up to Google drive, under the folder “case write-up”, two days before your presentation (for example, if the presentation date is on Tuesday, you need to submit the draft on Sunday).**

After the case presentation, the instructor will meet with the team to discuss how to improve the write-up. **The final version of case write-up is due one week after the presentation.**

An example of case write-up for the case “Wal-Mart Stores in 2003” (Harvard Business School, case number 9-704-430) could be found at Culearn.

You may also want to refer to the book “The case study handbook: how to read, discuss, and write persuasively about cases” (Author William Ellet). The book is available at library at Floor 2 as Circulation Desk Reserve, with call number [HD30.4 .E435 2007](#). The chapter 10-12 of the book are especially helpful for preparing the case write-up.

According to Professor Doug Allen at University of Denver<sup>1</sup>, some common shortcomings in write-ups include:

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<sup>1</sup> [www.daniels.du.edu/degrees/syllabi/MGMT4240.doc](http://www.daniels.du.edu/degrees/syllabi/MGMT4240.doc)

1. Restating the facts or copying the case material verbatim.
2. A wandering discussion that lacks direction. The use of headings often helps provide structure to your argument. Be specific as to issue, alternatives, and recommendations.
3. Failure to make a decision when the case calls for one. Choose a position and build an argument for it, even if you can see that another position also has merit.
4. Poor spelling, grammar or incomprehensible writing. The effectiveness of your communication can, in this class and in the business world, make an important difference in selling your ideas.

The case write-up will be evaluated based on the following criteria:

Clear explanation of key problems facing the firm	20%
Appropriate analysis for assignment questions	35%
Appropriate conclusion and recommendations	25%
Writing (Proper organization, professional writing, and logical flow of analysis)	20%

#### Case presentation

Your team needs to prepare a powerpoint file to be presented to the class. Specifically, your team needs to explain the case to the class, assuming the class is "top managers" and you are middle managers that reporting the current situation to them. The presentation should includes

1. Summary of the backgrounds and key facts of the company
2. The key points of your case write-up

The presentation should be around 20-30 minutes. The presentation will be evaluated based on the following criteria:

Visual design of the sliders	10%
Quality of ideas/solutions	25%
Appropriate organization of information on sliders	15%
Appropriate organization of verbal presentation	15%
Speaking style/delivery	20%
Appropriate response to comments	15%

#### Case comments

For each presentation, a non-presenting teams will be designated as the Challenger. The

Challenger team should provide a 5-10 minutes comments on the presentation. The comment may challenge the presenting team's analysis or recommendation, demand additional explanation from the team, or offer recommendation. The presenting team has also 5-10 minutes to respond to each comment.

Members of other teams are encouraged to also make comments. Bonus points will be provided for such participation (for the rules of participation bonus, see the next section)

Case comments will be evaluated based on the relevance and importance of the issue raised, and/or quality of recommendation.

### **PARTICIPATION BONUS**

The instructor will give discussion questions during lecture. The students are encouraged to participate in classroom discussion.

The instructor assigns bonus points to the participation. The students will get 1 bonus point each time for (1) answering the discussion questions; or (2) making comments in case discussion (when they are not a member of either the presenting or challenger team). The instructor may double the bonus point for a very insightful comment/solution.

1 bonus point is equivalent to 0.25% of the course evaluation items of your personal performance (attendance, in-class test, and individual case analysis). You can use the bonus points to add a Maximum of 10% to course evaluation items of your personal performance.

The instructor may take photos of students in order to identify students for classroom discussion. The photography taken in BUSI 3301A, which is classified as personal information, is collected in accordance with Sections 38(2) and 41(1) of the *Freedom of Information and Protection of Privacy Act* (FIPPA), R.S.O. 1990, c.F.31 as amended. The information provided will not be used for any purposes other than the evaluation of classroom discussion, unless you provide your consent. Should you have any questions concerning your personal information please contact the Privacy Officer for Carleton University 607 Robertson Hall, 1125 Colonel By Drive, Ottawa, ON K1S 5B6 Telephone: 613-520-2600 Ext. 2047 Email: [university\\_privacy\\_office@cunet.carleton.ca](mailto:university_privacy_office@cunet.carleton.ca). The photos will be confidentially disposed of at the end of the semester. Carleton University is fully compliant with FIPPA and endeavors at all times to treat your personal information in accordance with this law."

By taking this course, you are consent to the photograph.

### **INDIVIDUAL CASE STUDY**

There will be one case (Navistar: supply management, case number: 9A98C020) assigned to the class for students to analyze it individually. Each student needs to independently write answers to

questions for this case.

### MAKE-UP TEST/EXERCISE/CASE DISCUSSION

Make-up test (without penalty to the grade) will be allowed only if you cannot attend a class and provide the instructor with a university-sanctioned excuse for your absence.

For class exercise and case presentation, the student needs to provide the instructor with a university-sanctioned excuse for your absence *before the class*. The weights of the marks will be transferred to other evaluation items. Failure to notify the instructor before the class will result in the loss of the participation mark.

**COURSE SCHEDULE:** The following is a general outline of material to be covered during the semester. Note: the schedule is subject to changes in response to progress and opportunities that may arise in a given semester. Therefore it is imperative for you to attend class and be aware of new developments in the course that may affect the due dates of assignments or scheduling of tests.

	Chapter	Case <sup>1</sup> /exercise
1/10/2017	Introduction/ Chapter 2- purchasing process	
1/17/2017	Chapter 3-Purchasing Policy and Procedures	Exercise-Sprott purchasing policy
1/24/2017	Chapter 6-Supply Management and Commodity Strategy Development.	Case-Eagle Industries: Office supplies sourcing (UVA-OM-1181) <sup>2</sup>
1/31/2017	Chapter 7-Supplier Evaluation and Selection.	Case- Strategic Sourcing at Whirlpool China: Finding the Ideal Supplier (9B12D012)
2/7/2017	Chapter 8- Supplier Quality Management.	Case-Agile electric: quality issues in a global supply chain (9B12D011)
2/14/2017	Chapter 10-Worldwide Sourcing.	Case-Sherwood hockey stickers: global sourcing (9B12M003)
2/21/2017	Winter break	
2/28/2017	Chapter 11-Strategic Cost Management/ Pricing (Slider could be found on Culearn)	
3/7/2017	Chapter 13-Negotiation and Conflict Management.	In-class exam on pricing
3/14/2017		Supply chain negotiation game
3/21/2017	Chapter 19- Performance	Case-Metalcraft Supplier

	Measurement and Evaluation.	Scorecard(9-102-047)
3/28/2017	Chapter14- Contract Management.	Case- City of Sarnia- contract policing proposal (9B11B026)
4/4/2017	Chapter 17-Purchasing Services.	Case-Outsourcing at Office Supply Inc. (5-107-013)

Note: 1. Cases could be purchased from Ivey School of Business's web site:

<https://www.iveycases.com/>

2. The number in parentheses is the case reference number

### Course Sharing Websites

Student or professor materials created for this course (including presentations and posted notes, labs, case studies, assignments and exams) remain the intellectual property of the author(s). They are intended for personal use and may not be reproduced or redistributed without prior written consent of the author(s).

### Required calculator in BUSI course examinations

If you are purchasing a calculator, we recommend any one of the following options: Texas Instruments BA II Plus (including Pro Model), Hewlett Packard HP 12C (including Platinum model), Staples Financial Calculator, Sharp EL-738C & Hewlett Packard HP 10bII

### Group work

The Sprott School of Business encourages group assignments in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, follower-ship and other group skills. Group assignments are also good for learning integrative skills for putting together a complex task. Your professor may assign one or more group tasks/assignments/projects in this course. Before embarking on a specific problem as a group, it is your responsibility to ensure that the problem is meant to be a group assignment and not an individual one.

In accordance with the Carleton University Undergraduate Calendar (p 34), the letter grades assigned in this course will have the following percentage equivalents:

A+ = 90-100    B+ = 77-79    C+ = 67-69    D+ = 57-59

A = 85-89    B = 73-76    C = 63-66    D = 53-56

A - = 80-84    B - = 70-72    C - = 60-62    D - = 50-52

F = Below 50    WDN = Withdrawn from the course

ABS = Student absent from final exam

DEF = Deferred (See above)

FND = (Failed, no Deferred) = Student could not pass the course even with 100% on final exam

## **Academic Regulations, Accommodations, Plagiarism, Etc.**

University rules regarding registration, withdrawal, appealing marks, and most anything else you might need to know can be found on the university's website, here:

<http://calendar.carleton.ca/undergrad/regulations/academicregulationsoftheuniversity/>

## **Requests for Academic Accommodations**

### **Academic Accommodations for Students with Disabilities**

#### *For Students with Disabilities:*

The Paul Menton Centre for Students with Disabilities (PMC) provides services to students with Learning Disabilities (LD), psychiatric/mental health disabilities, Attention Deficit Hyperactivity Disorder (ADHD), Autism Spectrum Disorders (ASD), chronic medical conditions, and impairments in mobility, hearing, and vision. If you have a disability requiring academic accommodations in this course, please contact PMC at 613-520-6608 or [pmc@carleton.ca](mailto:pmc@carleton.ca) for a formal evaluation. If you are already registered with the PMC, contact your PMC coordinator to send me your **Letter of Accommodation** at the beginning of the term, and no later than two weeks before the first in-class scheduled test or exam requiring accommodation (*if applicable*). **Requests made within two weeks will be reviewed on a case-by-case basis.** After requesting accommodation from PMC, meet with me to ensure accommodation arrangements are made. Please consult the PMC website ([www.carleton.ca/pmc](http://www.carleton.ca/pmc)) for the deadline to request accommodations for the formally-scheduled exam (*if applicable*).

- The deadlines for contacting the Paul Menton Centre regarding accommodation for final exams for April 2017 exam period is March 10, 2017.

#### *For Religious Obligations:*

Students requesting academic accommodation on the basis of religious obligation should make a formal, written request to their instructors for alternate dates and/or means of satisfying academic requirements. Such requests should be made during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist, but no later than two weeks before the compulsory event.

Accommodation is to be worked out directly and on an individual basis between the student and the instructor(s) involved. Instructors will make accommodations in a way that avoids academic disadvantage to the student.

Students and instructors can confirm accommodation eligibility of a religious event or practice by referring to the Equity Services website

(<http://carleton.ca/equity/accommodation/religious-observances/>) for a list of holy days and Carleton's Academic Accommodation policies. If there are any questions

on the part of the student or instructor, they can be directed to an Equity Services Advisor in the Equity Services Department for assistance.

*For Pregnancy:*

Pregnant students requiring academic accommodations are encouraged to contact an Equity Advisor in Equity Services to complete a letter of accommodation. The student must then make an appointment to discuss her needs with the instructor at least two weeks prior to the first academic event in which it is anticipated the accommodation will be required.

### **Academic Integrity**

Violations of academic integrity are a serious academic offence. Violations of academic integrity – presenting another’s ideas, arguments, words or images as your own, using unauthorized material, misrepresentation, fabricating or misrepresenting research data, unauthorized co-operation or collaboration or completing work for another student – weaken the quality of the degree and will not be tolerated. Penalties may include; a grade of Failure in the submitted work and/or course; academic probation; a refusal of permission to continue or to register in a specific degree program; suspension from full-time studies; suspension from all studies at Carleton; expulsion from Carleton, amongst others. Students are expected to familiarize themselves with and follow the Carleton University Student Academic Integrity Policy which is available, along with resources for compliance at: <http://carleton.ca/studentaffairs/academic-integrity>.

### **Assistance for Students:**

Student Academic Success Centre (SASC): [www.carleton.ca/sasc](http://www.carleton.ca/sasc)

Writing Tutorial Services: <http://www1.carleton.ca/sasc/writing-tutorial-service/>

Peer Assisted Study Sessions (PASS): [www.carleton.ca/sasc/peer-assisted-study-sessions](http://www.carleton.ca/sasc/peer-assisted-study-sessions)

### **Sprott Student Services**

The Sprott student services office, located in 710 Dunton Tower, offers academic advising, study skills advising, and overall academic success support. If you’re having a difficult time with this course or others, or just need some guidance on how to successfully complete your Sprott degree, please drop in any weekday between 8:30am and 4:30pm. Our advisors are happy to discuss grades, course selection, tutoring, concentrations, and will ensure that you get connected with the resources you need to succeed! <http://sprott.carleton.ca/students/undergraduate/learning-support/>

Be in the know with what’s happening at Sprott: Follow @SprottStudents and find us on Facebook SprottStudents Sprott.

### **Important Information:**

- Students must always retain a hard copy of all work that is submitted.
- All final grades are subject to the Dean’s approval.
- Please note that you will be able to link your CONNECT (MyCarleton) account to other non-CONNECT accounts and receive emails from us. However, for us to respond to your emails, we need to see your full name, CU ID, and the email must be written from your

valid CONNECT address. Therefore, it would be easier to respond to your inquiries if you would send all email from your connect account. If you do not have or have yet to activate this account, you may wish to do so by visiting <https://portal.carleton.ca/>

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