Course Delivered online via M.U. Desire2Learn: [https://mansfield.desire2learn.com/](https://mansfield.desire2learn.com/)

Instructor: [Instructor Name]  
Office: Virtual  
Phone: [Instructor Phone Number]  
Email: [Instructor Email Address]

**Course Description**

Financial acumen is requisite to managerial practice. This course examines essential economic knowledge, challenges the development of skills in reading and interpreting financial statements, and explores the establishment and analysis of budgets. Learners will author a fiscal policy designating performance objectives, a budget technique, originate an original budget, and create a financial model of pro-forma statements based on a what if scenario having assessed a simulated economic environment and set of university provided or designated financial statements.

**Course Learning Objectives (Student Learning Outcomes)**

**Methods of Achievement and Assessment**

The course is designed so students will achieve the following learning objectives:

1. Interpret economic indicators from a variety of primary sources and explain their managerial relevance to organizational leadership (Appendix A: SLOs: 7a, d, g).
   - a. Readings  
   - b. Posted discussions  
   - c. Activity

2. Critique a collection of historical economic indicators assessing the past economic cycle to identify the present state of the economy and author a projection of the next phase of the economic cycle (SLOs: 4, 7g).
   - a. Readings  
   - b. Posted discussions  
   - c. Writing assignment

3. Paraphrase the principles and process of financial statement analysis (SLOs: 2,7a).
   - a. Readings  
   - b. Posted discussions

4. Recommend a course of action regarding an operation after computing and interpreting financial ratios from a set of financial statements (SLOs: 7a, d, g).
   - a. Readings  
   - b. Posted discussions  
   - c. Exercise  
   - d. Writing assignment

5. Discuss and differentiate the five budgeting approaches (SLOs: 7a, e).
   - a. Readings  
   - b. Posted discussions

6. Construct a budget using one of the five budgeting approaches and explain the appropriateness of this one choice relative to all others (SLOs: 2, 4, 7a, d, e, g).
a. Readings
b. Posted discussions
c. Activity
d. Writing assignment

7. Construct a budget using one of the five budgeting approaches and explain the appropriateness of this one choice relative to all others (SLOs: 2, 4, 7a, d, e, g).
   a. Readings
   b. Posted discussions
   c. Group project

8. Integrate knowledge and practice of economic awareness, financial health assessment, and budgeting to author a fiscal policy that establishes expectations, procedures, and rationale as decision making guideline to organizational leaders (SLOs: 2, 4, 7a, d, e, g).
   a. Group project

Course Design
Organizations are systems recognized under the law as created by people and operate or function in society on some relative scale through a fiduciary constituency. As system, James Grier Miller (1978) was the first to acknowledge the organization as one of seven strata of living systems. There are six (6) presuppositions that every leader and manager must know and appreciate about organizations as living systems.

1. The environment in which systems live is competitive.
2. The activity of an organization is economic.
3. The financial strength of an organization measures its health, attractiveness, and potential longevity.
4. The life-blood of an organization is its cash.
5. The blood pressure of an organization is its cash flow.
6. The virility of an organization to sustain, generate, and renew is observable in how it allocates and uses its resources.

This course is an exploration of these presuppositions as interdependent autocatalytic determinants. Understanding the competitive environment requires leaders to read previous outcomes while anticipating future activity. The aggregate past and future dynamics are reported quantitatively as economic indicators. Simultaneously, for a leader to appreciate the organization’s position and potential force within the competitive environment necessitates understanding its financial strength. Ratios are quantifications of relationships between items on individual statements and between two or more financial statements. The balance sheet is a summary of the organization’s resources and obligations. The income statement is a summation of the organization’s economic activity. The statement of cash flows conveys the use of cash as means of competitive interaction. It is through understanding the latter in relation to the former that leaders navigate a course through the planning and decisions of future operations. Communication of this intended navigation is through the budget. Assessment of actual progress and the probability of staying the course are through periodic analysis of the budget in conjunction with a review of economic indicators and the organization’s financial strength. Organization as culture is the recognition of a system of values that govern and guide managerial decision selection and action. Policies are the expression of an organization’s respective value systems. Organizational leaders author and sanctify policy.
As aspiring or practicing leaders, this course will challenge you to demonstrate competence regarding these presuppositions as experiential reality. You will be introduced to the key economic indicators to which prudent leaders pay regular attention. You will learn and exercise the skills of financial statement interpretation, budget creation, and budget analysis. The culminating practice deliverable is a financial policy and budget for an organization based on an assessment of economic indicators and the firm’s financial health.

**Required**


**Supplements**
Students will regularly access outside resources contributing to the course content and collective understanding and assist in implementing course assignments. Digital subscriptions are recommended but not required. This list is in no way exhaustive; the sole intent here is to offer a starting point of possible resources students may seek to locate through the Mansfield Library or Internet based search engine of one’s choosing.

**References**
Selected aspects of these readings were used to write unit overviews and course materials. These resources will help deepen your understanding of the course topics and to assist you in implementing your course assignments. Unit overviews and weekly readings can, may, and will include these selections.

**Recommended Explorations**
Appendix B is a bibliography of readings offered as a starting place for further inquiry and exploration.

**Topic Index:**
Balance of payments
Balance Sheet
Budget analysis
Budget controls
Budget efficiencies
Budget procedures
Budget systems
Budgeting
Budgets
Cost Budget
CPI
Credit Analysis
EBIT
Economics
Employment
Equity Analysis
Financial Statement Analysis
Flexible Budget
Forecasting
GDP
Income Statement
Income, Disposable
Income, Personal
Indicators
Industry
Investment
Master Budget
Monetary policy
National Debt
Population
Prices
Pricing
Pro-Forma Statements
Ratios
Statement of Cash Flows
Unemployment
Wages
Zero-base budget

Tentative Topic, Discussion, and Assignment Schedule

Unit 1 Economic Indicators (1/21/2014 – 2/16/2014)

Week 1: Fundamentals
Economist Chs 1, 2, & 3

Week 2: Totality & Policy
Economist Chs 4, 6, & 12

Week 3: Productivity, Payments, & Prices
Economist Chs 9, 10, & 13
Article Review #1 Due 2/9/2014

Week 4: Main Street
Economist Chs 5, 7, & 8
Economic Forecast Due 2/16/2014

Week 5: The Balance Sheet
Fridson & Alvarez, p. 29 – 33, 40 – 45
Fridson & Alvarez, p. 266 – 274
Balance Sheet Ratios and Interpretation Due Sunday

Week 6: The Income Statement
Fridson & Alvarez, p. 47 – 76
Fridson & Alvarez, p. 162 – 166
Fridson & Alvarez, p. 275 – 280
Income Statement Ratios and Interpretation Due Sunday

Week 7: The Statement of Cash Flows
Fridson & Alvarez, p. 79 – 81, 87 – 106
Fridson & Alvarez, p. 280 – 283
Fridson & Alvarez, p. 171 – 176
Cash Flow Ratios and Interpretation Due Sunday

Week 8: Forecasting & Pro-Forma Statements
Fridson & Alvarez, p. 225 – 246, 253 – 263
Fridson & Alvarez, p. 283 – 290
Fridson & Alvarez, p. 307 – 328
Combination Ratios and Interpretation Due Sunday
Du Pont Formula and Interpretation Due Sunday

Week 9: Semester Break (3/17 – 3/23)
Financial Statement Analysis w/ Pro Forma Statements Due Sunday


Week 10: Traditional Budget Model
Bragg, Ch 1, 22, & 25

Week 11: Budgeting Systems
Bragg, Ch 2 & 24
Budget Analysis Due

Week 12: Flexible
Bragg, Ch 17

Week 13: Cost
Bragg, Ch 18

Week 14: Zero-Base
Bragg, Ch 19

Week 15: Operating Without
Bragg, Ch 20
Article Review #2 Due 5/4/2014
Major Assignments and Performance Measures
During the course you will have the following assignments and responsibilities:

I. **Discussion Boards** – Each week of the course will have an assigned discussion forum of one to three questions relating to the provided course materials.

II. **Economic Forecast** – report of key economic indicators for the last 3/5 years with a projection of what the economy will do in the coming two to three years.

III. **Financial Statement Analysis** – A three (3) page opinion about the health of an organization based on a review of a set of financial statements. The opinion will be supported by a set of spreadsheets of each of the three statements and one sheet calculating ratios.

IV. **Article Reviews** – 350-500 words (2 paragraphs) offering a synopsis of a scholarly (peer-reviewed) piece of literature relating to a course leadership topic selected from the Mansfield University Library’s electronic databases.

V. **Budget Analysis** – Learners will complete an analysis of an organizational budget and offer a set of recommendations.

VI. **Policy Manual** – Teams will determine and author a set of policies relating to the three topics i.e., economic forecast, financial health, and budgeting.

VII. **Budget** – Each team will decide on a budget method as part of the policy and develop an example budget for an organization as part of the Policy Manual.

Each assignment will have detailed instructions posted on the course site in Desire2Learn (D2L). The due date for each assignment appears in the Tentative Topic, Discussion and Assignment Schedule. All formal assignment reports should be submitted using APA style with a cover page, an appropriate header and pagination, 1” margins, and so on. A sample format will be provided on D2L (courtesy of the Psychology Department). To facilitate this expectation, a Writing Rules document, project template document, and sample paper are all provided through D2L. The Writing Rules document expositions basic rules and advice on formal writing and APA guidelines and examples. The project template document is formatted for APA compliance and may be saved and edited by students for the purpose of completing a project. The sample paper is provided by the Psychology Department and is intended to convey compliance with expectations. Each of these assignments should be suitable for inclusion in your collected Portfolio for the M.A. in Organizational Leadership Program. Written assignments that require extensive field work or collaboration among students will be announced with sufficient lead time to allow you to do that work.

**Discussion postings:** A "threaded discussion" is a discussion forum that allows one user to begin a discussion by entering a message that can be read by other users (original post), who can then add their own comments in response to the original message. Other users can then add their responses to these comments. Thus, the discussion is "threaded" as one comment leads to another and another. Unlike chat rooms and other "real-time" interaction forums, threaded discussions are asynchronous; that is, they do not require
different users to be logged on at the same time. Instead, an individual can enter and contribute to a threaded discussion at any time, responding to a message posted a day or even weeks earlier.

Contributions to discussion questions should be posted to the appropriate “forum” and “topic” within the forum on the Discussions tab within D2L. Discussion questions will be visible the Friday prior to the beginning of the week. Discussion posting will be open for response Tuesday of each week at 7:00 PM EST the week the material is being covered. Each student is expected to complete an original post before the close of the Wednesday following (the next calendar day). At least two replies to separate classmates and any additional follow-up posts are to be posted no earlier than 7:00 PM EST Thursday (the next calendar day). Discussion boards will remain open and available until 5:00 AM EST on the Tuesday of the following week. Week 3 is exampled in the Table below. This pattern will repeat through the duration of the course.

<table>
<thead>
<tr>
<th>Week</th>
<th>Sunday</th>
<th>Monday (Day 1 of each Week)</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td></td>
<td>7:00 PM W3 DQ Forum unlocked.</td>
<td>11:59 PM Initial Responses to W3 DQs Due</td>
<td>11:59 PM Secondary Responses (to class) Due</td>
<td>W3 DQs visible</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>4</td>
<td></td>
<td>5:00 AM W3 DQ Forum locked.</td>
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</table>

The goal is to have meaningful discussion and feedback among students as defined here:

**Original Response:** Each original response must be a minimum of 250 words in APA formatting and incorporating course materials, outside references, and or experience properly cited both in text and at the end of the posting.

**Secondary Responses/Postings:** From Wednesday to Tuesday, each student must post a secondary response of a minimum of 150 words incorporating course materials, outside references, and or experience to at least two of his/her colleagues properly cited both in text and at the end of the posting.

This discussion thread is student-driven, and thus it is the professor’s role to facilitate the discussion and not lead it. The professor will post questions, comments, and other substantive information to help guide the dialogue. The minimum number of postings for each week will be the number of discussion questions plus two (2) responses i.e., 3 dqs + 2 sr = 5 postings minimum. Posting the minimal number required, assuming exemplary quality, will earn a maximum 75% grade. Students are encouraged to engage in collaborative discussions in addition to the required secondary postings throughout the week. You should strive to dialogue with as many students as possible over the course of the term.
Assessment is via the Threaded Discussion Rubric (Appendix C).

**Economic Forecast** – Examine your employer and consider the business from the CEO’s chair. Project what the economy will do in the coming two to three (2 - 3) years with respect to economic indicators that are of primary interest to your industry and business based on a review and analysis of the same economic indicators for the last three to five (3 – 5) years. As part of your projection, explain why the identified economic indicators are of primary interest or key to your business and industry.

See _______ Rubric (Appendix _) for evaluation criteria.

**Financial Statement Analysis** – In the role of CEO, write a three (3) page opinion about the health of an organization based on a review of a set of financial statements explaining how the use of this data applies to your daily responsibilities. The opinion will be supported by a set of spreadsheets of each of the three statements and one sheet calculating ratios. The instructor will either distribute a set of financial statements or direct students to access the Edgar Database at [www.sec.gov](http://www.sec.gov) and pull a 10K report of a publicly traded company.

See _______ Rubric (Appendix _) for evaluation criteria

**Article Review** – Learners will select a peer-reviewed journal article from the North Hall Library’s electronic databases for review. The review, headed by APA formatted reference will be concise and consist of two paragraphs containing the following information.

AuthorLastName, AuthorFirstNameInitial. (YEAR). Article title. *Journal Title, Vol*(Issue), page numbers.

1. Paragraph 1
   a. A synopsis of the article.
   b. Relationship of the topic(s) discussed in the article to topic(s) discussed in class.

2. Paragraph 2
   a. Value of the article with respect to learning.
   b. Value of the article with respect to practice.

See the Article Review Rubric (Appendix _) for evaluation criteria.

**Budget Analysis** – In the role of CFO, complete an analysis of an instructor supplied organizational budget and offer a set of recommendations highlighting a course of action. The opinion will be supported by a set of pro-forma spreadsheets that numerically illustrate the changes in the budget and the anticipated impact of each recommendation. Students are expected to explain their rationale for each recommendation.

See _______ Rubric (Appendix _) for evaluation criteria.
Policy Manual – This team project emphasizes strategic thinking. Teams will determine and author a set of policies relating to the three topics i.e., economic forecast, financial health, and operational budget, that guide the decision making of the managerial ranks of an organization within an instructor selected industry.

The basic structure of each policy:
Ø Synopsis
Ø Rule/ Guideline
Ø Logic/Rationale
   Ø Identify and define the topic, tool, technique, parameter, etc.
   Ø Explain how it is to be used/ practiced
   Ø Justify the why
   Ø Based on peer-reviewed literature and empirical data
Ø Consequence

The Fiscal Policy will detail how the three subsequent sets of policies are intended to be congruent and work in concert to optimize the financial decision making rules of the firm.

The Economic Forecast Policies will, (a) identify which economic indicators are of importance to the competitive position and capacity of the organization; (b) delineate why these indicators are attention warranted; (c) explain how these indicators inform organizational leaders and managers; (d) state how often these indicators are to be noted and communicated throughout the firm; and (e) describe how they are to be used in strategic and project planning and decision selection.

The Financial Health Policies will, (a) establish a range and target for all twenty-three ratios; (b) justify the targets and ranges; (c) explain how these ratios establish the health, attractiveness, and longevity of the firm; (d) describe how they are to be used in strategic and project planning and decision selection; and (e) describe how financial statement analysis acumen will be determined and used in managerial candidate selection and succession planning.

The Operational Budget Policies will, (a) establish a budget method; (b) explain the process for completing the budget according to the method established; (c) identify who will be responsible for budget development and tracking; and (d) how organizational management will be accountable for budgetary compliance.

See Paper/Presentation Rubric (Appendix _) for evaluation criteria.

Citation
The ORL program has adapted as its standard the American Psychological Association’s (APA) Sixth (6th) Edition. All formal assignment will comply with APA form and style with a cover page, an appropriate headers and subheadings, 1” margins, 12 pt. type san serif font e.g., Times Roman, Arial, Helvetica. Article Reviews are excepted. In-text and reference list citation is expected in all narrative (e.g., WORD documents), presentation (e.g., PowerPoint), and spreadsheets (e.g., Excel). In-text citation in Powerpoint presentations are to be in speaker notes. Please refer to Writing Rules (provided by the instructor on D2L) for guidance related to APA format and style standards.
Assignments Posted within the Desire to Learn (D2L) Course Site: Check the Content tab within D2L to see each week’s assignment. Instructions for written assignments and discussion posts will be visible there by 9:00 p.m. on the previous Thursday. Content is organized into “modules” with specific components called “topics” within each module. After the introductory module, most modules correspond to a week’s assignments.

Dropbox: Written assignments beyond simple discussion topics and directed at the instructor are to be deposited in the appropriately labeled Dropbox.

Grading: Letter grades will be assigned based on student performance in the course. Grades are earned on a 60/40 split. Sixty percent (60%) of the course grade is individual work. Forty percent (40%) of the grade is group work. Leadership/Group projects are also split 60/40. Sixty percent (60%) of the grade is assigned by the instructor. Forty percent (40%) of the grade is peer assigned. The following table shows the percentage weighting of the final grade earned in the course.

<table>
<thead>
<tr>
<th>Graded Assignments</th>
<th>Percent of Final Grade</th>
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<tr>
<td>Online Discussions</td>
<td>20</td>
</tr>
<tr>
<td>Economic Forecast</td>
<td>10</td>
</tr>
<tr>
<td>Financial Statement Analysis</td>
<td>10</td>
</tr>
<tr>
<td>Budget Analysis</td>
<td>10</td>
</tr>
<tr>
<td>Policy Manual (Group Work)</td>
<td>30</td>
</tr>
<tr>
<td>Budget (Group Work)</td>
<td>10</td>
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<tr>
<td>Article Reviews (2)</td>
<td>10</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
</tr>
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</table>

Letter grades will be assigned according to the following scale. Grades are calculated to two decimal places. Grades in ORL courses are NOT rounded.

<table>
<thead>
<tr>
<th>Start Value</th>
<th>Upper Value</th>
<th>Symbol</th>
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<tbody>
<tr>
<td>96</td>
<td>100</td>
<td>A</td>
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<tr>
<td>90</td>
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<td>A-</td>
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<td>C-</td>
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<tr>
<td>67</td>
<td>69</td>
<td>D+</td>
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<tr>
<td>63</td>
<td>66</td>
<td>D</td>
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</table>
**“Publication” of Written Work and Assignments:**
By continuation in this course and by submitting written assignments and work, students understand that they are granting the instructor permission under the Federal Education Records Act and a limited license to publish that work for the purposes of grading the work. That limited license extends to submission, within the instructor’s sole discretion, to various electronic grading tools (e.g., grading books, cite checkers, originality verification, etc.) and to other faculty members.

**Etiquette.** It is assumed and expected that all of us will communicate using standard writing forms and avoid slang or offensive language and the use of “texting” style abbreviations and shortcuts. We should expect that we will treat each other with respect, challenging ideas and analyses as appropriate but avoiding and personal attacks or criticisms. We are here to help each other think about these issues and to jointly learn. None of us deserves to be ridiculed or attacked for our thinking, our work efforts or even our confusion.

**Leadership Portfolio.** Students in all ORL courses are expected to keep an ongoing portfolio of their work and other saved material that hold the most power for them in terms of shaping the way they actually practice leadership. The research proposal developed in this course is an example of the learner’s critical thinking skills.

**Statement on Academic Integrity**
As participants in the MA/ORL learning community, each of us expects that we all will adhere to the principles and commitments of the Mansfield Creed (Character, Scholarship, Culture, Service) the Academic Integrity Policy. We should expect to treat each other with respect and adhere to the highest standards of academic integrity, openness, diversity of opinion, and fairness. Each of us is accountable for making a good faith effort to ensure that the course goes well.

The focus in any advanced graduate program such as ours is on learning, not on grading. However, all text and Internet sources must be cited, even if paraphrased. Any essay or written assignment copied from an undocumented source or paraphrased without proper citations will not count toward credit. Sometimes plagiarism and cheating occur because of a general lack of knowledge about copyright laws and “fair use” regulations. Once students are aware that they can quote passages of up to 50 words with proper citations, the incidence of plagiarism is quite reduced.

Students are expected to do their own academic work and submit original work. Where resources and sources of information are used, credit must be given to the original source.

Additional information concerning academic dishonesty can be found in the Graduate Bulletin, which outlines the procedures faculty will use to initiate disciplinary action in cases of academic dishonesty.
Learning Support
The University offers a variety of support services including tutoring, a writing center, resources for improving study and time management skills. Contact the Learning Center (570-662-4767) or e-mail kslusser@mansfield.edu for more information about these resources.

Counseling
MU provides FREE counseling for students. Contact the Counseling Center (570-662-4695) for more information: http://mansfield.edu/counseling-center/

Exceptionalities
Students with documented learning disabilities, physical challenges, or other significant medical conditions that may affect their learning in this course should meet with the University’s Disability Advisor in the Department of Academic and Human Development (141 South Hall, Phone: 662-4436) as soon as possible. The Disability Advisor will arrange to provide your professors with an appropriate letter so that we may serve your particular needs more effectively. If you have a disability that requires classroom or testing accommodations, the advisor will also clarify appropriate arrangements.
APPENDIX A

PROGRAM IN ORGANIZATIONAL LEADERSHIP STUDENT LEARNING OUTCOMES

Graduates of the Organizational Leadership Program will demonstrate:

1. An integrated knowledge of leadership theory, organizational behavior theory, change theory, and communication theory to demonstrate best practices in organizational leadership.
2. Knowledge of organizational planning, management of change, oversight of human resources, and leadership consistent with ethical, legal, and regulatory expectations.
3. Self-awareness of personal leadership style, strengths and skills, and how these impact others in an organization and a personal plan for leadership development.
4. Scholarly inquiry to evaluate the unique needs, challenges and opportunities of organizations.
5. Understanding and application of the values of diversity, social justice, integrity, ethical analysis and accountability, and change to promote the common good.
6. Analysis of the impact of social, ethical, cultural, economic, and political influences on organizational behavior in local, national and global communities.
7. Practical leadership skills:
   a. communicating effectively with others within and outside an organization;
   b. interpersonal problem solving and conflict resolution;
   c. group participation and facilitation;
   d. planning and decision making;
   e. budgeting;
   f. evaluating internal and external environmental forces on an organization and developing a plan to manage change;
   g. using current technology, statistical tools and information resources to assist in effective decision making;
   h. implementing needs assessments and evaluations of program and organizational performance;
   i. leading and managing human resources in diverse organizational environments;
   j. analyzing legal and ethical issues as applied to organizational leadership.
   k. communicating and working effectively in global communities
8. Specialty organizational leadership knowledge as a result of focused electives that serve students’ needs to be effective in their organizational practice arena.
9. Completion of supervised community experience where they have participated in the application of the knowledge base, values and skills outlined above.
APPENDIX B

BIBLIOGRAPHY

This list of recommended readings is offered as beginning points to further explore and learn.
## APPENDIX C: THREADED DISCUSSIONS RUBRIC

<table>
<thead>
<tr>
<th>Assessment Area</th>
<th>Does Not Meet Expectations</th>
<th>Meets Expectations</th>
<th>Exceeds Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quality</strong> {60%}</td>
<td>Postings are simple, not relevant and/or do not stay on topic. Does not express opinions or ideas clearly. Shows little original thought. -- Author reported gleanings of the course material without interpretation or application. Author failed to support ideas and/or opinions with course material, observations, and/or experience; or included outside references that are questionable or require explanation in terms of relevance to the topic. Terms used inappropriately and/or incorrectly. Characterized by poor spelling, poor grammar, and/or APA errors in most posts; posts appear “hasty.”</td>
<td>Postings demonstrate consideration of the question(s) relative to the unit material. Ideas and opinions are clear, concise, and definitive. Shows some original thought. -- Author interprets material accurately and communicates relevant application. Author anchors contribution in course material and observations or experience triggering further discussion. Uses technical vocabulary accurately. Some grammatical errors, spelling errors, and/or APA errors are noted in posts.</td>
<td>Writes in scholarly style – with breadth, depth. Uses language in a way that expands the discussion. Ideas and opinions are clear, concise, and open to reconsideration/modification. Shows original thought. -- Author interprets material accurately and either cogently explains the validity of the author’s ideas or cogently challenges author(s) assumptions. Uses graduate level vocabulary well. Author anchors contribution in course material and supplements with outside references, observations and/or experience advancing learning for all involved. No grammar, spelling, or APA errors.</td>
</tr>
<tr>
<td><strong>Objectivity / Complexity of Analysis (O / C A) {20%}¹</strong></td>
<td>Declarative symbolic level processing – concrete things in symbolic terms without having to use specific examples presented Declarative: explanation of position by bringing reasons forward separately without connection.</td>
<td>Cumulative: explaining one’s position by offering a number of different ideas when taken together are sufficient to make one’s case to Serial processing – concrete things in symbolic terms without having to use specific examples presented in Serial: a sequential/chained line of reasoning.</td>
<td>Parallel: a number of possible positions each held in parallel and are linked to each other and may condition each other.</td>
</tr>
<tr>
<td><strong>Contribution to the Learning Community</strong> {20%}</td>
<td>Shows lack of respect for other’s points of view. Postings lack netiquette. Fewer than required to minimum number required. Posting are tardy. Posting is infrequent.</td>
<td>Is courteous, respectful, positive, professional. Postings lack netiquette. Minimum number of required postings. Postings are on-time according to due dates. Posting is frequent 3+ days out of 7.</td>
<td>Engages others insightfully. Encourages others. Assists others with learning the material. Exceeds minimum number. Postings are no more than one day early. Posting is frequent &gt;=5 days out of 7.</td>
</tr>
</tbody>
</table>

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² The total and element scores are calculated fields. The present numbers are for verification that the calculations are correct and illustrative of how it will be presented to students when the rubric is copied and completed at the end of a paper. Actual scores can, may, and are likely to vary.

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Master of Arts Program in Organizational Leadership, Mansfield University of Pennsylvania, Mansfield PA 16933. Course Author:
APPENDIX D: RUBRIC, WRITING – ADVANCED

<table>
<thead>
<tr>
<th>Area</th>
<th>Does Not Meet Expectations</th>
<th>Meets Expectations</th>
<th>Exceeds Expectations</th>
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</thead>
<tbody>
<tr>
<td><strong>Form &amp; Style (F &amp; S) [15%]</strong></td>
<td>Did not follow instructor guidelines for writing. Poor grammar, punctuation / spelling – six (6) or more errors. Failed to use / comply with APA guidelines – six (6) or more citation rules violations evident.</td>
<td>Followed instructor guidelines for writing. Three (3) to five (5) errors in grammar, punctuation, and spelling. Uses / complied with APA guidelines attempted. Understanding of basic citation rules evident; three (3) to five (5) citation rules violations evident.</td>
<td>Followed instructor guidelines for writing. The content has a consistency in style characterized as a natural flow and well-constructed sentences that enhance the presentation of the material with thoughtful transitions, logical sequencing, appropriate elaboration, and a satisfying conclusion. Fewer than two (2) errors in grammar, punctuation, and spelling. Used / complied with APA guidelines exemplary. Fewer than two (2) citation rules violations evident.</td>
</tr>
<tr>
<td><strong>Problem / Opportunity Statements (P / O S) [15%]</strong></td>
<td>The problem is unidentified or lacks clarity. Context information contains irrelevant information. Diagnosis is characterized by incomplete thought development. The paper is disproportionately focused on the purpose/opportunity statement or obfuscates the issue.</td>
<td>Wordy identification of the problem / opportunity. Clarity of context information needs revision. Systemic diagnosis attempted; some information is extraneous or missing. The purpose/opportunity statement addresses the problem in a verbose manner.</td>
<td>The problem is clearly and succinctly identified in one sentence. The problem is cogently and concisely supported by requisite context information and systemic diagnosis. The purpose/opportunity statement stated with brevity addresses the problem.</td>
</tr>
<tr>
<td><strong>Literature (Lit) [20%]</strong></td>
<td>Author failed to conduct a literature search; failed to include peer-reviewed literature; or included references that are questionable or require explanation in terms of relevance to the topic.</td>
<td>Author conducted a literature search and included a moderate amount of peer-reviewed and practitioner narrowly focused references relevant to the topic.</td>
<td>Author conducted a literature search and included an extensive, comprehensive, and diverse set of interdisciplinary references relevant to the topic. All included references are appropriate.</td>
</tr>
<tr>
<td><strong>Content (Cnt) [20%]</strong></td>
<td>Is not focused on topic. More than one-tenth of the content is material out of the expected scope. Little discussion. Incomplete thought development / irrelevant information. Appears hastily written.</td>
<td>Focused on the topic required. All content material is within the expected scope. Thoughtful discussion -- Careful exposition of author selected content and explanation of its relevance. Well-planned and organized development of entries with relevant information.</td>
<td>Focused on the topic. The content material balances breadth and depth of scope. Insightful discussion -- Deliberate exposition of author selected content that adds to the learning and conversation. Raises and answers substantive questions about the topic.</td>
</tr>
<tr>
<td><strong>Objectivity / Complexity of Analysis (O / C A) [30%]</strong></td>
<td>Declarative to cumulative symbolic level processing -- concrete things in symbolic terms without having to use specific examples presented as Declarative: explanation of position by bringing reasons forward separately without connection to Cumulative: explaining one’s position by offering a number of different ideas when taken together are sufficient to make one’s case.</td>
<td>Serial to parallel symbolic level processing -- concrete things in symbolic terms without having to use specific examples presented in Serial: a sequential / chained line of reasoning to presented in Parallel: a number of possible positions each held in parallel and are linked to each other and may condition each other.</td>
<td>Abstract conceptual level processing -- using abstract concepts to address problems; demonstrates multi-variable awareness and interdisciplinary consideration; exercises system thinking at a meta-level ranging from declarative to cumulative to serial, to parallel processing.</td>
</tr>
</tbody>
</table>

Actual and final score calculation is recorded for each element below

<table>
<thead>
<tr>
<th>SCORE</th>
<th>F &amp; S</th>
<th>P / O S</th>
<th>Lit</th>
<th>Cnt</th>
<th>O / C Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>15</td>
<td>15</td>
<td>20</td>
<td>20</td>
<td>30</td>
</tr>
</tbody>
</table>


Master of Arts Program in Organizational Leadership, Mansfield University of Pennsylvania, Mansfield PA 16933. Course Author:
## APPENDIX E: RUBRIC, FINANCIALS

<table>
<thead>
<tr>
<th>Area</th>
<th>Does Not Meet Expectations</th>
<th>Meets Expectations</th>
<th>Exceeds Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Content (Cnt) [25%]</strong></td>
<td>The thesis is unidentified or lacks clarity. Context information contains irrelevant information. Diagnosis is characterized by incomplete thought development. Is not focused on topic. More than one-tenth of the content is material out of the expected scope. Little discussion. Incomplete thought development / irrelevant information. Appears hastily written. Author failed to support ideas and or opinions with peer-reviewed, professional, or news media related literature; or included references that are questionable or require explanation in terms of relevance to the topic.</td>
<td>Wordy thesis statement. Clarity of context information needs revision. Systemic diagnosis attempted; some information is extraneous or missing. Focused on the topic required. All content material is within the expected scope. Thoughtful discussion -- Careful exposition of author selected content and explanation of its relevance. Well-planned and organized development of entries with relevant information. Author supported ideas and or opinions with appropriate peer-reviewed, professional, or news media related literature.</td>
<td>The thesis is clearly and succinctly identified in one sentence. The thesis is cogently and concisely supported by requisite context information and systemic diagnosis. Focused on the topic. The content material balances breadth and depth of scope. Insightful discussion -- Deliberate exposition of author selected content that adds to the learning and conversation. Raises and answers substantive questions about the topic. Author supported, extended, or challenged ideas and or opinions with appropriate peer-reviewed, professional, or news media related literature.</td>
</tr>
<tr>
<td><strong>Form &amp; Style (F &amp; S) [15%]</strong></td>
<td>Did not follow instructor guidelines for writing. The wording and presentation are NOT audience appropriate. The content has irregularity of style characterized as awkward or difficult to follow flow, grammatically inaccurate sentence composition, lacking transitions and or headings, difficult sequencing within paragraphs, inadequate exposition, and or no conclusion to a conclusion that contains new information. Poor grammar, punctuation / spelling – six (6) or more errors. Failed to use / comply with APA guidelines – six (6) or more citation rules violations evident.</td>
<td>Followed instructor guidelines for writing. Up to ¼ of the wording and presentation are audience appropriate. The content has some irregularity of style characterized other than awkward flow, grammatically accurate sentence construction, headings and subheading or some transitions may require revision or are absent, acceptable sequencing, mixed exposition, and or a wordy to enticing conclusion. Three (3) to five (5) errors in grammar, punctuation, and spelling. Uses / complied with APA guidelines attempted. Understanding of basic citation rules evident; three (3) to five (5) citation rules violations evident.</td>
<td>Interpreted instructor guidelines for writing. The wording and presentation are audience appropriate. The content has a consistency in style characterized as a natural flow, well-constructed sentences, uses headings and subheadings judiciously or has thoughtful transitions, logical sequencing, appropriate exposition, and or a succinct satisfying conclusion. Fewer than two (2) errors in grammar, punctuation, and spelling. Used / complied with APA guidelines exemplary. Fewer than two (2) citation rules violations evident.</td>
</tr>
<tr>
<td>**Objectivity / Complexity of Analysis (O / C A) [20%]**³</td>
<td>Declarative to cumulative symbolic level processing – concrete things in symbolic terms without having to use specific examples presented as Declarative; explanation of position by bringing reasons forward separately without connection to Cumulative; explaining one’s position by offering a number of different ideas when taken together are sufficient to make one’s case.</td>
<td>Serial to parallel symbolic level processing – concrete things in symbolic terms without having to use specific examples presented in Serial; a sequential / chained line of reasoning to presented in Parallel; a number of possible positions each held in parallel and are linked to each other and may condition each other.</td>
<td>Abstract conceptual level processing – using abstract concepts to address problems; demonstrates multi-variable awareness and interdisciplinary consideration; exercises system thinking at a meta-level ranging from declarative to cumulative to serial, to parallel processing.</td>
</tr>
</tbody>
</table>

### RUBRIC, FINANCIALS cont.

| Spreadsheet {40%} | Layout of spreadsheet is poor characterized as difficult to read or follow; does not model that found in practice. All work is done on one worksheet or too few worksheets. Calculation(s) are incomplete, incorrect Key calculated items do not stand out. Bolding, italics, underlining and other formatting techniques inhibit readability. | Layout of spreadsheet is appropriate characterized as readable, similar, or acceptable to what would be found in practice. Uses one work sheet per purpose e.g., financial statement, task, set of calculations, or graphs/graphics. Calculations are correct Calculations are readily discernible. Bolding, italics, underlining and other formatting techniques help with readability. | Layout of spreadsheet is professional quality presentation; key information is easily read. Uses one work sheet per purpose e.g., financial statement, task, set of calculations, or graphs/graphics with worksheets connected via formulas. Calculations are correct with appropriate notation Key calculations are highlighted in some way to draw reader attention. Bolding, italics, underlining and other formatting techniques enhance readability. |
|---|---|---|

**Actual and final score calculation is recorded for each element below**

<table>
<thead>
<tr>
<th>SCORE</th>
<th>Content</th>
<th>F &amp; S</th>
<th>O / C Analysis</th>
<th>Spreadsheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>100.00</td>
<td>25.00</td>
<td>15.00</td>
<td>20.00</td>
<td>40.00</td>
</tr>
</tbody>
</table>
APPENDIX G: RUBRIC, ARTICLE REVIEW

<table>
<thead>
<tr>
<th>Area</th>
<th>Does Not Meet Expectations</th>
<th>Meets Expectations</th>
<th>Exceeds Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summation / Relevance Statements (S / R S) [90%]</td>
<td>The article is unidentified.</td>
<td>The article is identified by its bibliographic information.</td>
<td>The article is APA accurately identified by its bibliographic information.</td>
</tr>
<tr>
<td></td>
<td>The summary is the Author’s words; or is an unclear summary is &gt; 350 words.</td>
<td>The summary is 300-350 words and written from the learner’s point of view. The synopsis is clear.</td>
<td>The summary is 200-250 words and written from the learner’s point of view. The synopsis is clear and conveys the critical components of the article – premise, research question and or hypothesis, method, and conclusions</td>
</tr>
<tr>
<td></td>
<td>The review lacks a statement of relevance; or the relevance is verbose (&gt;250 words) and is uninteresting and or unappreciable to the reader.</td>
<td>The review offers a statement of relevance of 200-250 words that informs the reader.</td>
<td>The review offers a statement of relevance of 100-250 words that persuades the reader to seek the article.</td>
</tr>
<tr>
<td>Form &amp; Style (F &amp; S) [20%]</td>
<td>Did not follow instructor guidelines for writing.</td>
<td>Followed instructor guidelines for writing.</td>
<td>Followed instructor guidelines for writing.</td>
</tr>
</tbody>
</table>

Actual and final score calculation is recorded for each element below

<table>
<thead>
<tr>
<th>SCORE</th>
<th>S / R S</th>
<th>F &amp; S</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>100</td>
<td>80</td>
<td>20</td>
</tr>
</tbody>
</table>

The total and element scores are calculated fields. The present numbers are for verification that the calculations are correct and illustrative of how it will be presented to students when the rubric is copied and completed at the end of a paper. Actual scores can, may, and are likely to vary.

---

The Master of Arts Program in Organizational Leadership, Mansfield University of Pennsylvania, Mansfield PA 16933. Course Author:
APPENDIX L: RUBRIC, PEER ASSESSMENT RUBRIC

<table>
<thead>
<tr>
<th>Area</th>
<th>Does not Meet Expectations</th>
<th>Meets Expectations</th>
<th>Exceeds Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>responsibilities 40%</td>
<td>Does not fulfill responsibilities and relies on others to do their work</td>
<td>Fulfills responsibilities</td>
<td>Fulfills responsibilities and helps others</td>
</tr>
<tr>
<td></td>
<td>Performs some duties assigned by group</td>
<td>Performs all duties agreed to/assigned.</td>
<td>Performs all duties and helps others</td>
</tr>
<tr>
<td></td>
<td>Missed more than one team meeting without advanced notice</td>
<td>Absent from one meeting; reason is acceptable/ understandable</td>
<td>Never missed or was tardy for even one meeting.</td>
</tr>
<tr>
<td></td>
<td>Makes/ offers excuses for absences and or lack of contribution.</td>
<td>Contributes materials and in conversations in a timely manner.</td>
<td>Contributes materials early and participates in conversation in a professional manner.</td>
</tr>
<tr>
<td></td>
<td>Does not participate even after encouragement OR only marginally participates</td>
<td>Participates without having to be encouraged.</td>
<td>Role model level participation; encourages others by his/ her example.</td>
</tr>
<tr>
<td>contributions 30%</td>
<td>Needs to follow the team’s plan</td>
<td>Follows the team’s plan</td>
<td>Helps create the team’s plan and helps others stay on track</td>
</tr>
<tr>
<td></td>
<td>Fails to contribute to collects information that does not relate to the topic</td>
<td>Collect some basic information which mostly relates to the topic</td>
<td>Collects a lot of information that relates to the topic</td>
</tr>
<tr>
<td></td>
<td>Was not to minimally active in the creation, development, and proofing of the final deliverable</td>
<td>Contributes to the creation, development, and proofing of the final deliverable</td>
<td>Actively and consistently contributes to the creation, development, and proofing of the final deliverable</td>
</tr>
<tr>
<td>interactions with team mates 30%</td>
<td>Always monopolizes the conversation and does not listen to others</td>
<td>Listens to other’s ideas but sometimes talks too much</td>
<td>Listens to other’s ideas and speaks courteously when appropriate</td>
</tr>
<tr>
<td></td>
<td>Does not cooperate and argues with teammates</td>
<td>Cooperates with teammates and sometimes argues</td>
<td>Cooperates well with others and constructively disagrees</td>
</tr>
<tr>
<td></td>
<td>Usually does not respect opinions of others and wants things his/her way</td>
<td>Usually respects opinions of teammates and supports their decisions</td>
<td>Respects opinions of teammates</td>
</tr>
<tr>
<td></td>
<td>Does not ask or discuss questions with teammates</td>
<td>Asks and discusses questions with some teammates</td>
<td>Asks and discusses questions with all teammates</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Your name here</th>
<th>SCORE</th>
<th>Responsibilities</th>
<th>Contributions</th>
<th>Interactions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100.00</td>
<td>100</td>
<td>30.00</td>
<td>30.00</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Team member 2</th>
<th>SCORE</th>
<th>Responsibilities</th>
<th>Contributions</th>
<th>Interactions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100.00</td>
<td>40.00</td>
<td>30.00</td>
<td>30.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Team member 3</th>
<th>SCORE</th>
<th>Responsibilities</th>
<th>Contributions</th>
<th>Interactions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100.00</td>
<td>40.00</td>
<td>30.00</td>
<td>30.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Team member 4</th>
<th>SCORE</th>
<th>Responsibilities</th>
<th>Contributions</th>
<th>Interactions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100.00</td>
<td>40.00</td>
<td>30.00</td>
<td>30.00</td>
</tr>
</tbody>
</table>

6 Adapted from www.ece.utexas.edu/bell/newlegacy/files/peerassment.rtf
7 Enter names in the boxes
8 The total and element scores are calculated fields. The present numbers are for verification that the calculations are correct and illustrative of how it will be presented to students when the rubric is copied and completed at the end of a paper. Actual scores can, may, and are likely to vary.
9 Scores are entered for each team member in the box directly below the label. The faculty member will update the calculated cell.

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Course Author: