Incorporating Outcomes Assessment and Rubrics into Case Instruction

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ABSTRACT

Outcomes Assessment (OA) has emerged as the systemic mechanism for academic institutions to demonstrate to their stakeholders their viability as institutions that create and disseminate knowledge. Properly implementing outcomes assessment plans has been of paramount concern to postsecondary academic institutions whose accrediting bodies are requiring that institutions demonstrate that they have in fact achieved their goals and objectives. This study posits a preliminary methodology (a before/after study) for using grading rubrics, an instrument developed through outcomes assessment programs, for analyzing students' oral and written analyses of business cases. Results from the first round of data gathering from students' oral presentations are presented.

Introduction and Background

Outcomes Assessment (OA) has emerged as the systemic mechanism for academic institutions to demonstrate to their stakeholders their viability as institutions that create and disseminate knowledge. Properly implementing outcomes assessment plans has been of paramount concern to postsecondary academic institutions whose accrediting bodies are requiring that institutions demonstrate that they have in fact achieved their goals and objectives. For example, The Middle States Commission on Higher Education in their mission statement indicated that they are "dedicated to quality assurance and improvement through accreditation via peer evaluation. Middle States accreditation instills public confidence in institutional mission, goals, performance, and resources through its rigorous accreditation standards and their enforcement." (Middle States Commission on Higher Education, n.d.) Middle States has in fact produced a brochure that clarifies for these academic institutions Middle States' expectations regarding Institutional Assessment and Assessment of Student Learning entitled *Assessing Student Learning and Institutional Effectiveness: Understanding Middle States Expectations*. (Middle States Commission on Higher Education, 2005)

Outcome Assessment and Schools of Business

Outcome Assessment has not only affected institutions of higher learning as a whole but schools of business administration in particular since their specific supra accrediting bodies have adopted OA as the process in which schools must demonstrate student learning. IACBE, a business accrediting body addressing the needs of teaching institutions, claims that they are

> a leader in outcomes-based assessment and accreditation, in which excellence in business education is evaluated based on the results of the assessment of educational outcomes, rather than on prescriptive input standards. The IACBE believes that educational quality must be measured by outcomes rather than inputs, because inputs do not necessarily correlate with quality outcomes, since the quality of outcomes is dependent not only on inputs, but also on the processes used by the institution and its business programs to convert inputs to outcomes. The only accurate way to measure excellence in business education, therefore, is through the assessment of educational outcomes. (IACBE, n.d.)

AACSB, the oldest accrediting body of business schools, went one step further to more closely connect outcomes measures to performance standards. They

> changed [the standards] to reflect the maturity of the "outcomes assessment" movement and need for improved accountability measures. The 2003 standards place[d] emphasis on direct assessments of student learning. In mandating direct assessment, AACSB expects accredited institutions to formulate specific learning goals and conduct appropriate direct assessments of learning for purposes of improving curricula when deficiencies or opportunities for improvement are found. (AACSB International Accreditation Coordinating Committee, AACSB International Accreditation Quality Committee, November 20, 2007)

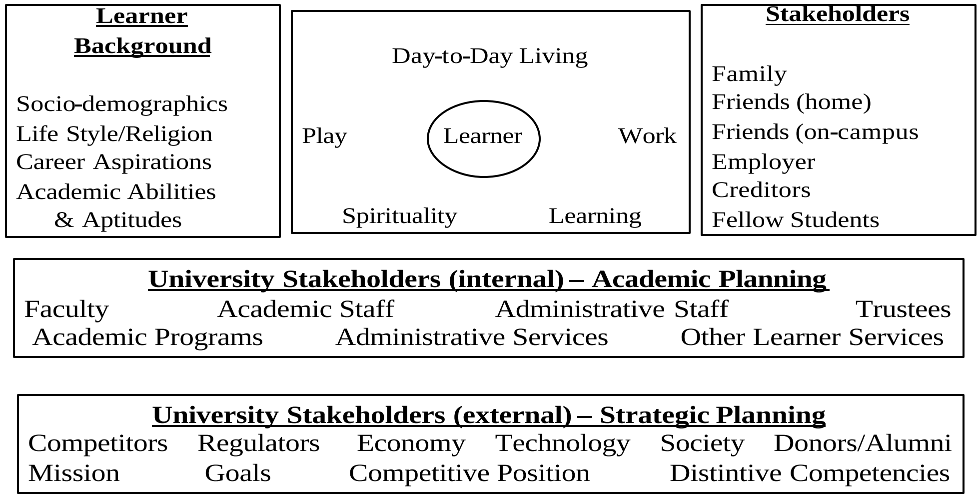
Schools of Business have therefore been charged with the responsibility of not only documenting that student learning has occurred but that the learning has occurred at least in part due to the students' exposure to the college's curriculum and explicitly the specific curriculum for the students' majors in business administration. This raises the question however as to where learning may actually occur in a student's college education and what role does classroom instruction play in their overall education.

A Model of Student Centered Learning in Higher Education

There is a growing acceptance that student learning should be a collaborative effort between the learner, the institution, and other institutional stakeholders; to paraphrase Hillary Clinton, it takes a college community to educate a student. (Clinton, August 27, 1996) Furthermore it is noted that learning can occur within any context. (Rowley and Sherman, 2004) It is therefore important to examine how higher education addresses the needs of the learner and also what is the context in which this learning takes place.

Rowley and Sherman (2004) have depicted the higher educational learning system as a series of building blocks which are necessary in order to construct a *learning community*. See Figure 1, below.

Figure 1
The Higher Education Learning Community



The lower layers of the model, the university's external stakeholders and the university's internal stakeholders, set the organizational context from which the institution's mission and objectives are formulated, implemented, and evaluated. The institution therein creates a strategic plan which enacts the institution's mission and goals, based upon its competitive position, distinctive competencies, and competitive advantage. (Rowley and Sherman, 2001)

The middle layer of the system consists of the faculty, administrators, and the Board of Trustees, who creates and institute academic and administrative services through the academic plan. The top of the system centers on the learner and the aspects of the learner's life during this period of learning (work, play, day-to-day living, learning, and spirituality). The wings connected to the learner, his or her background and his or her stakeholders; define the world of the learner. It is interesting to denote that actual academic "learning" is a small part of the learner's actual college experience, although Rowley and Sherman (2004) argued that it was the center of that experience. This learning includes the academic learners themselves, programs, faculty, administrators, staff, facilities, and equipment dedicated to the creation, dissemination and storage of both raw data and knowledge – in more traditional terms research, instruction, and library services. (Rowley and Sherman, 2003)

This broad-based definition of learning includes what has been categorized as either nontraditional or noncredit learning, and includes off-campus as well as on-campus programs, lecture series, and even high school acceleration programs. No matter in what context, location or learning mode, these activities are considered part of the learning process.

Outcomes Assessment and Learning in Higher Education

It is implied then that outcome assessment should capture the entire learner's experiences both within and outside the traditional learning environment (also known as the classroom – live or on-line); that all of the variables (independent, mediating, and moderating) that impact learning should be accounted for to determine which factors positively or negatively added to the learner's education. More specifically, outcomes assessment must discern what actions directly and indirectly taken by the university had both positive and negative impact on student learning (their abilities and aptitudes) and what actions the university can take both internally and externally to create a nurturing learning community.

The above statement acknowledges the fact that the university has control over some aspects of the learning environment and not others. For example, the university has control over its own curriculum, organizational structure, mission, goals and objectives, infrastructure, and other operational functions as part of the educational system value chain. Public institutions however may have less control over these variables since much of their policies and procedures are imposed by the State. (Burke, 2007) More importantly, numerous aspects of student learning are outside of an institution's direct purview. They may try to exert influence on external university stakeholders, the learner's stakeholders as well as try to influence the learner's career aspirations. (Pfeffer and Salancik, 1978)

Student learning, however, is most directly impacted by the university through course instruction; what the faculty member and the students do in the classroom or on-line. Outcome assessment instruments can therefore be readily applied to this unit of analysis since it is closest to the actual phenomenon being studied (Hitt et. al., 2007) and can be tailored to better fit the specific instructional methodology employed in each and every course. Students can then be directly assessed for course-specific learning while minimizing externalities impacting the learning process. (Campbell and Stanley, 1963) In management training and development this is akin to Boyatzis's (1982) notion of testing managers' competencies (performing a needs assessment prior to learning) to determine which management competencies that the managers lack before enrolling that managers in a training program. One would then provide competency-specific training, and then evaluate the training's impact on the managers' job performance.

Levels of Objectives

According to Bloom's (1956) Taxonomy, human thinking skills can be broken down into the following six categories.

1. *Knowledge*: remembering or recalling appropriate, previously learned information to draw out factual (usually right or wrong) answers. Use words and phrases such as: how many, when, where, list, define, tell, describe, identify, etc., to draw out factual answers, testing students' recall and recognition.
2. *Comprehension*: grasping or understanding the meaning of informational materials. Use words such as: describe, explain, estimate, predict, identify, and differentiate, etc., to encourage students to translate, interpret, and extrapolate.
3. *Application:* applying previously learned information (or knowledge) to new and unfamiliar situations. Use words such as: demonstrate, apply, illustrate, show,

solve, examine, classify, and experiment, etc., to encourage students to apply knowledge to situations that are new and unfamiliar.

4. *Analysis*: breaking down information into parts, or examining (and trying to understand the organizational structure of) information. Use words and phrases such as: what are the differences, analyze, explain, compare, separate, classify, and arrange, etc., to encourage students to break information down into parts.
5. *Synthesis*: applying prior knowledge and skills to combine elements into a pattern not clearly there before. Use words and phrases such as: combine, rearrange, substitute, create, design, and invent, what if, etc., to encourage students to combine elements into a pattern that's new.
6. *Evaluation*: judging or deciding according to some set of criteria, without real right or wrong answers. Use words such as: assess, decide, measure, select, explain, conclude, compare, and summarize, etc., to encourage students to make judgments according to a set of criteria.

Learning objectives, and therefore the related assessment instruments, need to address the differing levels of learning embedded in a course. The classroom as a unit of analysis can therefore be broken down into specific learning objectives for the course by level of objective and specific assessment instruments developed and employed to evaluate those objectives. (Dwyer, 1991) It is suggested that

> What you teach should determine how you need to assess learning. You should tie your objectives with your assessment to achieve the expected results … after writing learning objectives you should think about how to assess the students' achievement of the different learning objectives.
> 1. Different learning objectives define the scope and methods of assessment.
> 2. Relating different levels of objectives with assessment instruments and all items that are graded will make sure you achieve your specific objectives.
> 3. Busy students need to know what they must do to achieve in the course: What are the assignments? What are the projects? How will they be graded? (Anonymous, n.d., March 6, 2008)

Student Grading and Assessment

Student grades are indications of how individual students performed on assessment instruments based upon existing performance standards and are provided to students as a feedback mechanism on prior learning as well as a reward/ punishment for that performance. High scores on assessment instruments should inevitably lead to high grades in order to reinforce such behavior while low scores should act to negatively reinforce poor performance and lead to altered learning patterns.

Objective assessment instruments, those of a quantitative nature (true/false, multiple choice), are easy to score (and hence evaluate performance) but have the inherent flaw of usually addressing lower level learning objectives. These assessments do not depend on the assessor since it is clear to all assessors what the correct answers are. However these instruments are not without flaws: instructors may legitimately disagree about the best answer (sometimes more than one is correct); use of ‘textbook language’ encourages rote learning; the questions may contain irrelevant material; negative terms may be used unnecessarily (i.e. all of the above except) and are not emphasised; and the question provides clues to the correct answer. (Department of Education and Training, n.d.)

Qualitative or subjective assessments present their own problems. (Cashin, 1987) Most faculty members are either not aware of their evaluative criteria when evaluating for example essay exams or are not willing to share their performance expectations with their students. Faculty may have an implicit set of standards which they may or may not evenly apply. Students may be forced to guess as to what those criteria are (assuming that they are aware that this is an issue they need to deal with) even if learning objectives and course grading standards are distinctly listed on your course outline. Most faculty members 'wing' their evaluations, that is, they have their own internal standards, a mental model (Johnson-Laird and Byrne, 2000) so to speak, but never commit it to paper nor inform the students as to what the criteria of evaluation are that the students' works are being compared to. (Leach, Vega, and Sherman, *forthcoming*)

By not specifying evaluating criteria, students are being set up to misinterpret the question as well as possibly provide inappropriate answers. This may be merely due to not giving them enough direction and information about the assessment instruments. Faculty need to develop assessment instruments that can be shared with students so as to minimize their task uncertainty (Galbraith, 1977) and maximize their opportunity for success. Faculty need to give students grades that reflect their knowledge as determined by the course learning objectives rather than their understanding of the assignment and their ability to guess instructor performance criteria. Having students guess at these criteria is counterproductive to the learning experience.

Assuming that clearly identified criteria for students' grades can be determined by the instructor for subjective assessments (based upon the learning objectives that the testing instrument is addressing), grades can also be determined based upon student improvement or creativity so that the student is reinforced for those accomplishments. An evaluative system such as this might result in building enthusiasm for the subject matter and learning in general. (Gopinath, 2004)

Regardless of assessment methodology, for outcomes assessment to be an effective process of continuous improvement for the institution, students must become cognizant of what learning they must demonstrate based upon the nuances of each assessment instrument.

Outcomes Assessment and Grading Rubrics

In order to more closely align learning objectives and student grading (and therein outcomes assessment) grading rubrics are used to guide faculty judgment when evaluating student performance on assessment instruments where there is more than one answer. "Rubrics are a way of explicitly stating the criteria for student work. They may lead to a grade or be part of the grading process. However, they are more specific, detailed, and disaggregated than a grade. Thus they can show strengths and weaknesses in student work." (Walvoord and Ehrmann, n.d.) Rubrics serve as behaviorally-anchored rating scales by clearly indicating what student responses would garner good grades and which responses would be considered unacceptable. See Figure 2, below.

Figure 2
Sample Grading Rubric: Written Assignment Evaluation
(Anonymous, n.d., March 11, 2008a)

Content and Structure

Trait	A	B	C	D
Content	Writing is purposeful with logic maintained throughout.	Maintains clear and logical subject/position.	Subject/position is vague with no unifying statement. Drifts or has lapses in logic. Consists of repetitions and redundancies.	Insufficient writing or quality too poor to judge if criteria are met.
Support	All major points fully developed and supported evenly by specific detail throughout the paper (e.g. explanation, evidence, examples, figures, tables, or graphs). Supporting evidence is understandable and well-organized.	All key points developed and supported by specific detail. Some points may not be as well developed as others (uneven). Supporting evidence for main points, but lacks depth.	Some key points developed by specific detail, some may be too general and/or lack depth. Supporting evidence is minimal.	Insufficient or repetitious writing that fails to develop key points. Lacks supporting evidence and/or supporting evidence is unrelated to key points.
Organization	Structure is clear, appropriate and effective. All paragraphs are appropriate and purposeful. Coherence (paragraph to paragraph) and cohesion (sentence to sentence) are effective throughout paper. All points are logically presented and interrelated.	Structure is clear and appropriate to purpose. Most major points are appropriately paragraphed. Coherence (paragraph to paragraph) and cohesion (sentence to sentence) are demonstrated with appropriate transitions. Most points logically presented and organized.	Structure is evident. May have inappropriate or intrusive transitions that disrupt the progression of ideas. Some major points appropriately paragraphed. Has coherence (paragraph to paragraph) but lacks cohesion (sentence to sentence) or vice versa. May have one or more minor digressions.	Structure is missing or attempted but not obvious to the reader. Limited evidence of appropriate paragraphing. Little structure within paragraphs. May have one or more major digressions.
Focus	Clearly sets purpose of paper through introduction or overview. Effective conclusion that relates to introduction and unifies the writing.	Clearly sets purpose of paper through introduction or overview. Clear conclusion.	Subject/position identified by only a brief, general introductory statement. Conclusion is absent or only a verbatim reiteration of the introduction.	Subject/position (or issue) is unclear.

Writing Mechanics

Trait	A	B	C	D
Sentences and Paragraphs	Usage of sophisticated sentence patterns. Paragraphs indicate shift in thought and are used to make sequence of events clear.	Simple and some complex sentences are used. Some paragraphing to show sequence of events/ideas.	Sentence structure is usually correct. Simple sentences are used. Little attempt made to paragraph writing.	Sentences do not make sense. No paragraphing.
Word Choice	Words are used correctly and precisely.	Acceptable vocabulary. Words are technologically appropriate.	Simple vocabulary.	Incorrect vocabulary.
Spelling	Spelling is correct, including complex and irregular words.	Spelling is generally accurate.	Frequent spelling errors.	Spelling errors interfere with understanding.
Punctuation	A range of punctuation including commas, apostrophes, colons and semicolons is used accurately and effectively.	Periods and capitals are used correctly and punctuation is beginning to be used within sentences.	Frequent punctuation errors.	Insufficient or lacks punctuation. Incorrect use of capital letters.

Note that the above rubric in Figure 2 provides specific guidelines for students to employ both in terms of the organization of the paper's content as well as writing mechanics. More specifically, each criterion is denoted as to those factors that determine the relative quality of a student's writing and each cell for each criterion describes a specific writing behavior with an associated assessment of performance.

The Case Method and Outcomes Assessment

The case method is one of the oldest methods of business instruction and is considered by most to be an excellent instructional methodology for teaching critical thinking and problem-solving skills. (Shugan, 2006) Professors usually use prepared cases, and the students are required to read, analyze, provide a solution and present their analysis and recommendations in written and/or oral form. Preparing a case allows students to practice analyzing a situation, formulating a solution strategy, and developing a preliminary implementation plan. The building blocks of this process are clear, and cases usually come with case notes which provide the analysis and solution to the case for the benefit of the instructor. (Anonymous, n.d., March 11, 2008b) This is mostly problem-based learning, with the work graded and evaluated subjectively by the instructor. (Armandi, Sherman, and Vega, 2004)

The Preliminary Study

While using cases is a valuable method of teaching, it also provides ample additional pedagogical opportunities which this manuscript seeks to explore. It is suggested in this study that the use of outcomes assessment methodologies such as evaluation rubrics, process feedback and peer evaluation will enhance the academic rigorousness of using cases in business courses, in this particular preliminary study, a strategic management class.

In addition to the usual advantages of the case method, students in this study will benefit in various ways given the specific team structure of the learning environment; these benefits include:
1. a deeper understanding of the subject matter
2. improved presentation and team work skills
3. higher level of involvement in the course
4. learning to align their learning efforts more closely to instructor requirements
5. providing an assessment that is more transparent and impartial and
6. a more comprehensive view of management as a whole.

This preliminary study, if successful in showing student performance improvement as well as increased student satisfaction, aims at redesigning the strategic management course so as to include outcomes assessment instruments, more specifically grading rubrics. Results from this beginning study may lead to a more comprehensive investigation of the effectiveness of the proposed pedagogy.

Background and Rationale for the Study

The case method is an extremely rich pedagogical instrument. In a strategy course it may be employed in a team learning environment, where 3-5 students prepare and present their work. The case method's value is in seeing how strategic planning and strategic management techniques actually work in the real world. This aids the learner in mastering the subject matter in various ways. First, through the study of actual business practices, learners are able to see how many of the theoretical underpinnings of the discipline work in affecting the course of organizational growth, prosperity, and survival. Second, it takes theory and tests it in practice. The results of this analysis are often the basis for further introspection and analysis. Third, the case study approach provides the learner with the opportunity to answer such questions as "What would I do in these circumstances? What kinds of decisions would I make to affect a positive difference? How would I know if I was or was not doing the right?" Second-guessing real-world decision makers is not only an interesting process; it is also an important educational process. Finally, case studies bring the subject matter to life. Most case studies are real, and the study of what actually happened makes it more meaningful for the learner. This active learning approach has many benefits over other methods of learning the subject matter (such as pure lecturing), and gives learners the opportunity to engage the studies on a first-person basis. (Naumes and Naumes, 1999)

These advantages brought the case method to the forefront of business education all over the world. Notwithstanding these important strengths, however, we wish to add outcomes assessment as well as a behavioral focus, which goes beyond the solution of the case and explores the challenging process of case analysis. In addition, this study aims to test the use of performance and evaluation rubrics as a pedagogical tool in improving students' learning and skill development. This is a viable enhancement to teaching cases, which could be easily adopted by any instructor. It has value not only to our students and university, but to the business education community as a whole, which uses cases so readily.

Methodology

This study involves an educational experiment that has already commenced, as part of the Long Island University business school's outcomes assessment initiative. MAN 151 "Managerial Planning and Control" is an advanced undergraduate class, which uses case analyses to teach the strategic management process. The students have been divided into teams of 4-5 students each, with each team analyzing and presenting three cases throughout the semester. All teams present the same cases. The students needed to use PowerPoint slides as a visual aid, as well as hand in a written outline of their presentation.

Three performance evaluation rubrics have been employed for these cases analyses (see Appendix A): one assessed the content of the presentation, and corresponds to an outline given to the students as a tool to assist with the case analysis preparation. The content of the first rubric was developed collaboratively between the course instructor and another faculty member who has expertise in strategic management and who has taught a similar course at another comparable institution. They examined the major content areas of the course, the assigned textbook, several other texts in the field, and determined the key areas of analysis which any strategic analysis of a firm should include (see Grant, 2008; Pearce and Robinson, 2005). These content areas also correspond to a highly complex grading rubric posed in Sherman, Rowley, and Armandi (2006).

The second and third rubrics are generic in nature. The second rubric assessed the presentation as a whole: non-verbal and vocal skills, time, visual aids, professionalism and more. The third rubric assessed the written component of the presentation. Both rubrics were developed by The Technology Applications Center for Educator Development, the Texas Center for Educational Technology. (http://www.tcet.unt.edu/START/instruct/general/oral.htm)

Each presentation will be assessed and graded with the use of the rubrics as follows: All students in the audience complete the first two rubrics for each presentation they observe, as "peer evaluators". Besides the instructor, two additional evaluators will grade the presentations and written outlines: one a professor and the other a graduate student. Both professors are full-time employees of LIU, hold a Ph.D. in Management, and have over 10 years experience teaching and grading case presentations. The graduate student is a high-performing MBA student with some experience in grading and in case analysis.

This data will be collected at two points during the semester, namely: at the first and the third presentations. After each presentation, the students will receive the usual feedback relating to the content of the presentation. In addition, we will be providing context feedback (on their presentation skills) as well. Each group will have feedback sessions with each of the participating professors. These sessions will focus on the group's task processes: how well did they perform as a group, how much cohesiveness and unity of performance have they achieved, how well they used verbal and non-verbal communications, how were their slides, and so on. The instructor will also provide as much assistance and additional feedback as each group requires.

At the end of the semester, the students will complete a survey, asking them to evaluate their experience in the class. How much improvement do they recognize in their performance and skill, and which elements of the case methodology have been most useful to them?

Expected and Anticipated Outcomes

This teaching study hopes to accomplish various outcomes, first of which is enhancing teaching outcomes for students in this class. Rather than sufficing with teaching the strategic management process, students are also provided with valuable management skills such as team work, presentation skills, giving and receiving feedback, maintaining working relationships with peers, and seeing the big picture of case analysis; process as well as outcome. It is believed that providing students with such skills would assist them not only in succeeding with their future courses, but also in the corporate world, where such proficiencies are crucial and sought-after.

Second, this study incorporates outcomes assessment as part of the teaching methodology in the classroom. This is an innovative pedagogy, which the authors are very excited about. It enhances an educational tool that is widely used in business schools, and as such would be relevant and valuable to hundreds of instructors worldwide.

Third, in this study evaluation rubrics are developed, utilized and tested. As popular as cases are in business schools, rubrics are seldom used. This teaching initiative develops as well as tests rubrics that, with the publication of this study, could be widely used as another enhancement to the case pedagogy. More importantly for students, developing and testing such rubrics is an important step towards a more transparent, unbiased student evaluation process. Due to the elusive nature of case teaching, students often complain of the vagueness of assessment tools and processes. The more students become familiar with the evaluation tool, the better they can prepare. This study takes an important step towards proving that the use of such rubrics is instrumental in aligning performance and evaluation, as well as providing students with a less frustrating and more fulfilling learning experience.

Fourth, this study provides outcomes assessment for employing such teaching methodologies: both objective and subjective. Objectively, it is hoped that there will be improvement in students' performance between the first and third case presentations. Subjectively, measures of students' perception of their advancement during the semester should allow researchers to assess to what degree students' value these teaching methodologies.

Finally, this research strives to be a first step in a more comprehensive investigation of the case method. While this initiative is innovative and fresh, it lacks empirical elements such as a control group, larger sample size, and a more comprehensive model, hypotheses and so fourth. This is a very modest design, which could be enlarged given positive results from this study as well as grant funding. Once the results show performance enhancement, student satisfaction, and skill development, one could then proceed with a newly designed course as well as a larger study.

Evaluating the Study & Preliminary Results

To assess the achievement of our goals, of building students skills, providing better evaluation tools, testing rubrics and assessing students' satisfaction, students' progress as well as perceptions will be evaluated. First, students' case analysis, presentation and written report on their first and third course presentations will be assessed. As the complexity of the cases increase and the extent of the material grow throughout the semester, demands on the students increase as well. It is hoped that despite this increase, students' performances will improve. By measuring performance in various ways (peer, professor, outside evaluator, graduate student) it is hoped that satisfactory validity for this preliminary investigation is achieved. Analysis, public speaking, writing, team cooperation, coordination and leadership are but a few of the skills this study seeks to enhance in students.

Second, students' progress via self-assessment questionnaires will be evaluated at the conclusion of the semester. The researchers would inquire as to students' perceived progress, as well as the specific elements of the course that helped them most in achieving progress.

Initial data from students' first presentation (see Appendix B) have been collected. An examination of the descriptive statistics indicates that, in general, students scored average to above average (between 3-4 on a 5 point scale) in the content areas of analysis (goals to recommendations) but scored slightly lower (average to below average; between 2-3) in the presentation area. Students seemed to do quite well with industry analysis, internal analysis and SWOT Table and were least successful in vocalization and facial expression. Chi-squares and correlation analysis indicated that the evaluators (instructor, graduate assistant, outside evaluator, and students) in general had statistically significant agreement in evaluations in the content areas but slightly less agreement in the presentation areas, most notably with facial expressions, vocal skills, and time frame.

Conclusions

It is believed that this initiative has already provided value to students in the MAN 151 course. The standard case teaching pedagogy has been enhanced by providing more process training and feedback, by clarifying evaluation scheme, by utilizing outcomes evaluation tools such as peer evaluations and by providing repeated team experiential exercises. It is hoped that this is merely a first step in a groundbreaking educational advancement both within LIU and in business education everywhere.

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Appendix A
Evaluation Rubrics

1. Case evaluating form: evaluating content
2. Oral presentation rubric: evaluating presentation
3. Written assignment evaluation: evaluating written presentation outline

LONG ISLAND UNIVERSITY

School of Business, Public Administration & Information Sciences
Spring 2008

MAN 151 – Managerial Planning & Control
Case Evaluation Form: Strategic Analysis

For each element, assess the content of the presentation between 1-5:

1	2	3	4	5
Non-existent	Poor	Acceptable	Good	Excellent

1. Strategic Direction: Goals and objectives **1 2 3 4 5**

2. Macro Environment: list opportunities and threats **1 2 3 4 5**

(Political/legal, Economic, Technological, Social, International)

3. Industry Environment (5 force analysis) **1 2 3 4 5**

How attractive is the industry? What are the main threats/opportunities there?

4. Internal Environment: **1 2 3 4 5**

(Finance, Marketing, Operations, Human Resources, Other areas in the value chain)

5. What is Cognex's distinctive competence & competitive advantage? **1 2 3 4 5**

6. What is the central problem? **1 2 3 4 5**

7. Summarize your findings in a SWOT table **1 2 3 4 5**

8. What are the strategic options you can see? (pros and cons for each) **1 2 3 4 5**

9. Provide your final strategic recommendation. What are some actions they need to take to implement it? **1 2 3 4 5**

Oral Presentation Rubric

Criteria	1 (Poor)	2 (Fair)	3 (Good)	4 (Excellent)
Nonverbal Skills				
Eye Contact	Does not attempt to look at audience at all, reads notes the entire time	Only focuses attention to one particular part of the class, does not scan audience	Occasionally looks at someone or some groups during presentation	Constantly looks at someone or some groups at all times
Facial Expressions	Has either a deadpan expression of shows a conflicting expression during entire presentation	Occasionally displays both a deadpan and conflicting expression during presentation	Occasionally demonstrates either a deadpan OR conflicting expression during presentation	Gives audience clues to what the content of speech is about; Appropriate expression, never notice a deadpan or conflicting expression
Gestures	No gestures are notices			Natural hand gestures are demonstrated
Posture	Sits during presentation or slumps		Occasionally slums during presentation	Stands up straight with both feet on the ground.
Vocal Skills				
Enthusiasm	Shows absolutely no interest in topic presented	Shows some negativity toward topic presented	Occasionally shows positive feelings about topic	Demonstrates a strong positive feeling about topic during entire presentation
Vocalized Pauses (uh, well uh, um)	10 or more are noticed	6-9 are noticed	1-5 are noticed	No vocalized pauses noticed
Content				
Topic Announced	Audience has no idea what the report is on		Vaguely tells audience what report is over	Clearly explains what the report is covering
Time frame	Presentation is less than minimum time	Presentation is more than maximum time		Presentation falls within required time frame
Visual Aid	Poor, distracts audience and is hard to read	Adds nothing to presentation	Thoughts articulated clearly, but not engaging	Visual aid enhances presentation, all thoughts articulated and keeps interest
Completeness of Content	One or more points left out	Majority of points glossed over	Majority of points covered in depth, some points glossed over	Thoroughly explains all points
Professionalism of Presentation	Mumbles, audience has difficulty hearing, confusing	Thoughts don't flow, not clear, does not engage audience	Thoughts articulated clearly, though does not engage audience	Presentation is organized and the interest level of the audience is maintained

Written Assignment Evaluation

Name ________________________________
Date ____________
Class _______________________________
Assignment ____

	A	B	C	D
Content	An abundance of material Clearly related to topic; Points are clear and all Evidence supports the discussion	Sufficient information that Relates to topic; many good points but uneven balance or little variation	There is a great deal of information not clearly related to the topic	Topic not clearly stated; information insufficient or superfluous
Organization	The assignment is well constructed; it is succinct and provides even transitions; headings and sub-headings are well constructed	Most information in logical sequence but transitions or flow is difficult	Concept and ideas are loosely connected; lacks clear transitions, choppy	Presentation is choppy or disjointed; development of topic is vague; lacks order
Materials	Balanced use of outside sources or graphical material; selection of references adds to the discussion	Sources and graphical material adequate, but not varied or compelling	Sources or graphical material present but do not fully connect to the topic	Few or no outside references or graphical material that add to the topic
Mechanics	Presentation captures the reader's attention; no grammatical or spelling errors; sources are cited correctly	Presentation adequate; few grammatical or spelling errors; style errors in citation	Presentation uninteresting; several grammatical or spelling errors; citation style not correct	Presentation bland; pervasive grammatical or spelling errors; style and citation errors numerous

Evaluation

	A	B	C	D
Content				
Organization				
Materials				
Mechanics				

ASSIGNMENT GRADE _______

Appendix B
Preliminary Data Analysis

This study includes a comparison between two sets of data: one collected during the first presentation (out of three during the semester), and one collecting during the third and last presentation. The first presentation already took place, on February 21, and data were collected with rubrics 1 and 2 from Appendix A above. We have conducted preliminary descriptive statistics:

1. Min, Max, Mean, Std.
2. Summary of Chi-squares, and Pearson Correlations of evaluator and survey variables. (Crosstabs available upon request.)

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
eval	159	1.00	4.00	3.7358	.74164
day	159	1.00	2.00	1.3459	.47717
group#	159	1.00	7.00	3.6918	1.98076
goals	158	1.00	5.00	3.8323	.91277
macroenv	157	2.00	5.00	3.7166	.84024
industenv	156	2.00	5.00	3.8782	.81986
interenv	158	1.00	5.00	3.9146	.79847
competadv	148	1.00	5.00	3.7264	.87157
problem	152	1.00	5.00	3.7171	.93616
SWOTtabl	153	2.00	5.00	3.9314	.84693
options	151	1.00	5.00	3.8675	.88638
recommend	152	1.00	5.00	3.9474	.83022
eyecontact	92	1.00	4.00	2.7772	.86241
facialexpre	91	1.00	4.00	2.6868	.73654
gestures	90	1.00	4.00	2.8278	1.14451
posture	91	2.00	4.00	3.4286	.72866
vocalskills	28	2.00	4.00	3.1071	.56695
enthusiasm	93	1.00	4.00	2.7742	.80594
vocpause	94	1.00	4.00	2.6489	1.04426
content	28	2.00	4.00	3.1429	.59094
topicannou	94	1.00	4.00	3.3989	.68226
timeframe	86	2.00	4.00	3.4651	.82173
visualaid	94	1.00	4.00	3.0904	.69159
completens	94	1.00	4.00	2.9681	.71395
professpres	94	1.00	4.00	2.8989	.79169
unknown	2	3.00	3.00	3.0000	.00000
Valid N (listwise)	0				

Preliminary Results
Summary of Chi-Squares/Pearson Correlations of
"All Evaluators" by all Rubric Variables (N= 159)

	Chi-Square		Pearson Correlation	
Variables	*Value*	*Significance*	*Value*	*Significance*
Group #	.767	1.00	-.056	.485
Goals	43.704	.000	.159	.046
Macro Env	110.011	.000	.383	.000
Industry Env	67.578	.000	.262	.001
Internal Env	31.909	.007	.101	.207
Competit Adv	89.641	.000	.240	.003
Problem	72.747	.000	.154	.059
SWOT Table	72.896	.000	.145	.073
Options	52.490	.000	.103	.206
Recommend	52.882	.000	.198	.014
Eye Contact	50.719	.000	.176	.094
Facial Express	41.494	.001	.131	.216
Gestures	35.980	.000	.243	.021
Posture	39.802	.000	.148	.161
Vocal Skills	3.158	.206	.259	.183
Enthusiasm	86.985	.000	.261	.012
Vocal Pause	18.896	.026	-.031	.764
Content	4.383	.625	.010	.959
Topic Announc	25.418	.013	.224	.030
Time Frame	5.412	.492	-.185	.087
Visual Aid	37.941	.000	.150	.150
Completeness	96.668	.000	.285	.005
Professional	28.863	.004	.308	.003