

Graduate Certificate in Family Business Management and Advising

Syllabi

Instructor and Course Information

Instructor:	Tomasz A. Fediuk, Ph.D.
E-mail:	tomasz.fediuk@louisville.edu
Office Location:	College of Business U of L
Phone:	xxx
Office Hours:	By Appointment – we can use any platform (teams, zoom, skype, Google Hangouts)
Class Website:	BlackBoard (https://blackboard.louisville.edu)
Course Availability:	XXX
Course Start Date:	XXX
Course Ending Date:	XXX

I will respond to email and phone calls within 24 hours in most cases, 48 hours on weekends or holidays. If you do not receive a response within that time period, please reach out again.

Course Description:

The purpose of this course is to introduce students to family enterprises and their management. Throughout this course, students will develop a general understanding of family enterprises, how they are unique, and the different challenges that they face to remain a family owned. The emphasis of the course is on the development of a set of tools, vocabulary, knowledge, and skills needed to understand the world of family enterprises. The course emphasizes the benefits and challenges inherent in managing, owning, working, and advising these types of organizations.

Prerequisite: **No pre-requisites.**

Required Materials

Leach, P. (2015). *Family Enterprises: The Essentials (4th Edition)*. Profile Books. ISBN: 978-1781255483.

Additional readings provided through class website.

Course Learning Objectives:

By the end of this course students will be able to:

1. Describe the manager's environment, functions and responsibilities within family enterprises.
2. Identify the different benefits and challenges that family enterprises face based on their degree of development.
3. Explain the factors that influence the survival and continuity of family enterprises
4. Analyze the interconnections between the family, business and ownership system in family enterprises.

5. Illustrate family and business logics can influence the management of a family enterprise.
6. Articulate the unique practices necessary to successfully manage a family business.
7. Apply evidence-based decision-making tools and techniques for the execution of planning, organizing, leading, and controlling management functions within family businesses

Taking an Online Class

Taking an online class is different than taking a face-to-face class. Without lectures, you will be teaching yourself to learn. That's what life-long learning is all about. You will also do most of your communicating by writing. As a result, there will likely be more writing than in face-to-face classes.

Class communication is largely asynchronous, which means that everyone is not participating in the class at the same time. You can access the course any time, day or night, from anywhere that you have an internet connection.

The roles of the teacher and the student are different than you may be used to. I am a facilitator, guide, coach, or resource. My job is to create an effective learning environment. Your job is to use that environment to learn – interact with the materials, construct and share information, manage your time effectively, and use that time for critical thinking, reflection and application. You are in control and responsible for your own learning.

My role as the instructor is to be here to support and help you, but it is up to you to ask for help when you need it. Unlike face-to-face classes, I cannot see the confused look on your face when something doesn't make sense.

Make sure that you are setting aside enough time for this course. Many students expect to spend about 3.5 hours per module, since that is what they usually spend attending a face-to-face course. However, they don't consider the time they spend outside of class reading, studying, and doing assignments. With this in mind, you should plan to spend between 6 and 7 hours per module on average.

Technology Expectations

Because this course is held completely online, you will need to have access to a computer and reliable high speed internet. If you do not have access at home, you may be able to use a public library or come to campus to use computers in the library or one of the IT student computer labs. Make sure that you will have access several hours per week and that the computer allows you to upload and download files as well as play audio and video.

You must be able to use internet search tools, access Blackboard, use email, and know how to download and upload documents. You must also be able to play videos and have headphones or speakers.

All written assignments should be completed using Microsoft Word. Please use a virus checker on all documents before submitting them. As a student, you can get a free copy of Word and other Microsoft software. Visit [Microsoft Office365 Pro Plus for Students](https://louisville.edu/email/office-365-proplus-for-students/microsoft-office-365-proplus-for-students/) (<https://louisville.edu/email/office-365-proplus-for-students/microsoft-office-365-proplus-for-students/>) for more information.

For your privacy and security, *only* your official U of L email account will be used for email communication. No information will be sent to personal email accounts. Please check your U of L email daily.

Teaching Methods & Evaluation:

This course is held completely online through Blackboard. The course is divided into 5 sections, or “Modules”. For each module, you will have required reading assignments, recorded lectures to watch, some practice activities, a journal post, a discussion board activity, and case analysis. In addition, you will have activities during each Module that build on each other, resulting in a final project due at the end of the course.

Each Module has a due date, and you cannot move on to the next Module until you have submitted all activities for the previous one. However, if you finish a Module early, you may move on and work ahead on the next Module.

All assignments will be submitted within Blackboard.

Your grade in this course will be determined by your performance in the following areas:

Course Requirement	Points Per Module	Total Points
Reading Brief	10	50
Discussion Boards	20	100
Mini Case Analysis	20	100
Personal Journal	10	50
Student Interaction	10	50
Final Comprehensive Case		50
Total		400

- ***Reading Brief:*** Students will prepare a reading brief based on the reading assignments for each module. The reading brief answers the following questions:
 - What are your key takeaways from the assigned readings?
 - How does the information from the readings help you better understand family firms?
 - Given the readings:
 - What do you believe are key knowledge areas that you need to have to work with family firms? - Explain why.
 - What are key skills and abilities that you need to be able to work with family firms? – Explain why?
 - What are three questions that come to your mind after these readings?
 - What are two ways that you can use the information you learned when interacting with family firms?

The brief is intended to help you summarize in your own words the key takeaways from each module and their application.

- ***Discussion Board Participation:*** Each module will have two discussion questions for you to address. These questions are designed to help students apply the content of the module into everyday experiences and interaction.
- ***Mini-Case Analysis:*** Each module will present students with a mini-case for them to read and analyze so they can answer four application questions based on the content of the module.

- **Personal Journal:** Students will complete a set of self-assessments and then write a short analysis of how their results would influence their capability to work with their family or with other family business.
- **Student Interaction:** The interaction of students in the discussion board and other activities will be graded to ensure the development of a learning community. Students are expected to interact with others.
- **Final Case Analysis:** There will be one comprehensive case analysis that will act as your final exam. This case will be provided with Module 3.

Grading

The final grade is based on the following scale:

Grade	Percentage	Grade	Percentage	Grade	Percentage
A+	97 to 100	A	93 to 96	A-	90 to 92
B +	87 to 89	B	83 to 86	B-	80 to 82
C +	77-79	C	73-76	C-	70-72
D	60-69	F	0-59		

Note: *The grading scale cutoffs have already been rounded. Thus, there will be no negotiation regarding final grades – even for grades that are .5 points from the next higher grade.*

Course Policies

- **Netiquette:** Netiquette is a set of rules for behaving properly online. Something about cyberspace makes it easy for people to forget that they are interacting with other real people. The following bullet points cover some basics to communicating online:
 - Be sensitive to the fact that there will be cultural and linguistic backgrounds, as well as different political and religious beliefs, plus just differences in general.
 - Use good taste when composing your responses in Discussion Forums. Swearing and profanity is also part of being sensitive to your classmates and should be avoided. Also consider that slang can be misunderstood or misinterpreted.
 - Don't use all capital letters when composing your responses as this is considered "shouting" on the Internet and is regarded as impolite or aggressive. It can also be stressful on the eye when trying to read your message.
 - Be respectful of your others' views and opinions. Avoid "flaming" (publicly attacking or insulting) them as this can cause hurt feelings and decrease the chances of getting all different types of points of view.
 - Be careful when using acronyms. If you use an acronym it is best to spell out its meaning first, then put the acronym in parentheses afterward, for example: Frequently Asked Questions (FAQs). After that you can use the acronym freely throughout your message.
 - Use good grammar and spelling, and avoid using text messaging shortcuts.

- **Academic Integrity Policy:** Academic dishonesty is prohibited at the University of Louisville. It is a serious offense because it diminishes the quality of scholarship, makes accurate evaluation of student progress impossible, and defrauds those in society who must ultimately depend upon the knowledge and integrity of the institution and its students and faculty.

A plea of ignorance is not acceptable as a defense against the charge of academic dishonesty.

When students submit work purporting to be their own, but which in any way borrows ideas, organization, wording or anything else from another source without appropriate acknowledgement of the fact, the students are guilty of plagiarism. Plagiarism includes reproducing someone else's work, whether it be a published article, chapter of a book, a paper from a friend or some file, or something similar to this. Plagiarism also includes the practice of employing or allowing another person to alter or revise the work, which a student submits as his/her own, whoever that other person may be.

When a student's assignment involves research using outside sources of information, the student must carefully acknowledge exactly what, where and how he/she employed them. If the words of someone else are used, the student must put quotation marks around the passage in question and add an appropriate indication of its origin. Making simple changes while leaving the organization, content and phraseology intact is plagiaristic.

- **Accessibility Needs:** The university of Louisville is committed to providing access to programs and services for qualified students with disabilities. If you are a student with a disability and require accommodation to participate and complete requirements in this class, notify me immediately and contact the Disability Resource Center (119 Stevenson Hall, 502-852-6938) for verification of eligibility and determination of specific accommodations. Please also review information at:

- <https://louisville.edu/disability>
- **Grade Appeals:** If you feel that an inadvertent error has been made in the grading of an individual assignment, or in assessing an overall course grade, please submit a request to have that grade re-evaluated. Such request should be submitted in writing to me within 7 days of receiving the grade, including a brief argument for why you believe an error in grading has been made. I will then reevaluate the contested material and your grade may increase or decrease as a result.

University Guidelines and Policies

- **Title IX/Clergy Act Notification:** Sexual misconduct (including sexual harassment, sexual assault, and any other nonconsensual behavior of a sexual nature) and sex discrimination violate University policies. Students experiencing such behavior may obtain confidential support from the PEACC Program (852-2663), Counseling Center (852-6585), and Campus Health Services (852-6479). To report sexual misconduct or sex discrimination, contact the Dean of Students (852-5787) or University of Louisville Police (852-6111).

Disclosure to **University faculty or instructors** of sexual misconduct, domestic violence, dating violence, or sex discrimination occurring on campus, in a University-sponsored program, or involving a campus visitor or University student or employee (whether current or

former) is **not confidential** under Title IX. Faculty and instructors must forward such reports, including names and circumstances, to the University's Title IX officer.

For more information, see the Sexual Misconduct Resource Guide found at:

- <http://louisville.edu/hr/employeerelations/sexual-misconduct-brochure>

- **Religious Holy Days and Observances:** Federal law and university policy prohibit discrimination on the basis of religious belief. It is the policy of the University of Louisville to accommodate students, faculty, and staff who observe religious work-restricted holy days.

Students: Students who observe work-restricted religious holy days must be allowed to do so without jeopardizing their academic standing in any course. Faculty are obliged to accommodate students' request(s) for adjustments in course work on the grounds of religious observance, provided that the student(s) make such request(s) in writing during the first two (2) weeks of term.

Deans and department chairs must investigate and resolve student complaints arising from alleged faculty failure to make reasonable accommodations under these guidelines.

- **Statement on Diversity:** The University of Louisville strives to foster and sustain an environment of inclusiveness that empowers us all to achieve our highest potential without fear of prejudice or bias.

We commit ourselves to building an exemplary educational community that offers a nurturing and challenging intellectual climate, a respect for the spectrum of human diversity, and a genuine understanding of the many differences-including race, ethnicity, gender, gender identity/expression, sexual orientation, age, socioeconomic status, disability, religion, national origin or military status-that enrich a vibrant metropolitan research university.

We expect every member of our academic family to embrace the underlying values of this vision and to demonstrate a strong commitment to attracting, retaining, and supporting students, faculty and staff who reflect the diversity of our larger society.

Student Success

- **Office Hours:** The instructor offers office hours between Monday and Friday. Feel free to visit my office hours (appointments are *recommended*, though not required). Or, you can email me to schedule a conference.
- **Resources**
 - **The Writing Center.** The University Writing Center is committed to supporting the writing of distance education students. If you are taking a distance education course and cannot make a face-to-face appointment at the Writing Center, you can schedule an online consultation through their Virtual Writing Center. They provide both online live chat sessions and, when that's not possible, they can respond to your draft in writing through an eTutoring session. Learn more at the [Writing Center](#) website.
 - **Library Services.** Library services are available for students in distance education-online courses, including off-campus access to online databases and Electronic Course Reserves. The UofL librarians are available to assist you with library services. For more information view the [Library Services for Distance Education and Online Courses page](#).

- **Technical Support.** If you need technical support with your university account, unlocking your password, accessing wireless, Blackboard or other technical issues, contact the HelpDesk at (502) 852-7997. You can chat with a support expert or submit an email by visiting the [HelpDesk Resources](#) website. Many useful videos can be found at the [Blackboard 9.1 Help](#) page

Course Organization

Module	Start Date	Topic	Activities/Assignments	Due Date
Introductions		Introductions and Expectations	BlackBoard Becomes Available Complete all Orientation Activities	
Module 1		Understanding the Functions of Management in family businesses: The Planning Function		
Module 2		Understanding the Functions of Management in family businesses: The Organizing Function		
Module 3		Understanding the Functions of Management in family businesses: The Leading Function		
Module 4		Understanding the Functions of Management in family businesses: The Controlling Function		
Module 5		Helping Family Business Managers Succeed.		

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Instructor and Course Information

Instructor: Isabel C. Botero, Ph.D.
E-mail: isabel.botero@louisville.edu
Office Location: W 212 College of Business U of L
Phone: +1-502-852 4782
Office Hours: By Appointment – we can use any platform (teams, zoom, skype, Google Hangouts)
Class Website: BlackBoard (<https://blackboard.louisville.edu>)
Course Availability: XXX
Course Start Date: XXX
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Course Description:

This course provides an overview of the multiple definitions of family, and it explains how family dynamics (e.g., parenting, cohesion, communication) affects the business functioning and vice versa.

Prerequisite: No pre-requisites.

Required Materials

Dyer, G. (2019). The Family Edge: How your biggest competitive advantage in business isn't what you've been taught. Familius: USA

Additional readings provided through class website.

Course Learning Objectives:

By the end of this course students will be able to:

1. Outline what a family is and the different typologies used to classify families.
2. Develop a family Genogram
3. Identify critical family dynamics that can influence the continuity of a family business
4. Describe how family conflict can translate into the business and the consequences of this.
5. Explain how family norms and expectations can help or harm a business family
6. Determine how to assess a family to understand their dynamics and their working relationships.
7. Understand the importance of communication in the family system and how it can help the family develop important competencies to work together.

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Technology Expectations

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on each other, resulting in a final project due at the end of the course.

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 - **Library Services.** Library services are available for students in distance education-online courses, including off-campus access to online databases and Electronic Course Reserves. The UofL librarians are available to assist you with library services. For more information view the [Library Services for Distance Education and Online Courses page](#).
 - **Technical Support.** If you need technical support with your university account, unlocking your password, accessing wireless, Blackboard or other technical issues, contact the HelpDesk at (502) 852-7997. You can chat with a support expert or submit an email by visiting the [HelpDesk Resources](#) website. Many useful videos can be found at the [Blackboard 9.1 Help](#) page

Course Organization

Module	Start Date	Topic	Activities/Assignments	Due Date
Introductions		Introductions and Expectations	BlackBoard Becomes Available Complete all Orientation Activities	
Module 1		Understanding the nature of families and their relationships.	Chapter Reading	
Module 2		Family Dynamics and their influence in the business.	Chapter Reading	
Module 3		Family conflict and its effect on the business and the family	Chapter Reading	
Module 4		The importance of family norms and expectations	Chapter Reading	
Module 5		Assessing the family and their working relationships	Chapter Reading	

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Instructor and Course Information

Instructor: Isabel C. Botero, Ph.D.
E-mail: isabel.botero@louisville.edu
Office Location: W 212 College of Business U of L
Phone: +1-502-852 4782
Office Hours: By Appointment – we can use any platform (teams, zoom, skype, Google Hangouts)
Class Website: BlackBoard (<https://blackboard.louisville.edu>)
Course Availability: XXX
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Course Ending Date: XXX

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Course Description:

This course provides a general understanding of the succession process including: (1) how to prepare the next generation to enter and become an active member of the firm, (2) how to help multiple generations work together, and (3) how to prepare the older generations to exit the company or transition to another part of the family business.

Prerequisite: No pre-requisites.

Required Materials

Gust, G. (2019). *The Secrets to Succession: The PIE Method to transitioning your family business*. Gust Publishing. ISBN: 978-1999546007.

Additional readings provided through class website.

Course Learning Objectives:

By the end of this course students will be able to:

1. Explain the transition process in family firms and all of its elements.
2. Describe the different aspects of preparing the next generation to be an active member of the family business.
3. Identify the multiple components involved in a succession process.
4. Help family businesses formulate the different stages of their transition process
5. Recognize the challenges that business families can face during transition and identify how to help families navigate these challenges.
6. Explain the importance of transition planning in family businesses.
7. Develop a basic plan for management transitions within a family business.

Taking an Online Class

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For your privacy and security, *only* your official U of L email account will be used for email communication. No information will be sent to personal email accounts. Please check your U of L email daily.

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Final Comprehensive Case		50
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 - What are your key takeaways from the assigned readings?
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 - What do you believe are key knowledge areas that you need to have to work with family firms? Explain why.
 - What are key skills and abilities that you need to be able to work with family firms? – Explain why?
 - What are three questions that come to your mind after these readings?
 - What are two ways that you can use the information you learned when interacting with family firms?

The brief is intended to help you summarize in your own words the key takeaways from each module and their application.

- **Discussion Board Participation:** Each module will have two discussion questions for you to address. These questions are designed to help students apply the content of the module into everyday experiences and interaction.
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interact with others.

- **Final Case Analysis:** There will be one comprehensive case analysis that will act as your final exam. This case will be provided with Module 3.

Grading

The final grade is based on the following scale:

Grade	Percentage	Grade	Percentage	Grade	Percentage
A+	97 to 100	A	93 to 96	A-	90 to 92
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C +	77-79	C	73-76	C-	70-72
D	60-69	F	0-59		

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 - Don't use all capital letters when composing your responses as this is considered "shouting" on the Internet and is regarded as impolite or aggressive. It can also be stressful on the eye when trying to read your message.
 - Be respectful of your others' views and opinions. Avoid "flaming" (publicly attacking or insulting) them as this can cause hurt feelings and decrease the chances of getting all different types of points of view.
 - Be careful when using acronyms. If you use an acronym it is best to spell out its meaning first, then put the acronym in parentheses afterward, for example: Frequently Asked Questions (FAQs). After that you can use the acronym freely throughout your message.
 - Use good grammar and spelling, and avoid using text messaging shortcuts.
- **Academic Integrity Policy:** Academic dishonesty is prohibited at the University of Louisville. It is a serious offense because it diminishes the quality of scholarship, makes accurate evaluation of student progress impossible, and defrauds those in society who must ultimately depend upon the knowledge and integrity of the institution and its students and faculty.

A plea of ignorance is not acceptable as a defense against the charge of academic dishonesty.

When students submit work purporting to be their own, but which in any way borrows ideas, organization, wording or anything else from another source without appropriate acknowledgement of the fact, the students are guilty of plagiarism. Plagiarism includes reproducing someone else's work, whether it be a published article, chapter of a book, a paper from a friend or some file, or something similar to this. Plagiarism also includes the practice of employing or allowing another person to alter or revise the work, which a student submits as his/her own, whoever that other person may be.

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 - <https://louisville.edu/disability>
- **Grade Appeals:** If you feel that an inadvertent error has been made in the grading of an individual assignment, or in assessing an overall course grade, please submit a request to have that grade re-evaluated. Such request should be submitted in writing to me within 7 days of receiving the grade, including a brief argument for why you believe an error in grading has been made. I will then reevaluate the contested material and your grade may increase or decrease as a result.

University Guidelines and Policies

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Disclosure to **University faculty or instructors** of sexual misconduct, domestic violence, dating violence, or sex discrimination occurring on campus, in a University-sponsored program, or involving a campus visitor or University student or employee (whether current or former) is **not confidential** under Title IX. Faculty and instructors must forward such reports, including names and circumstances, to the University's Title IX officer.

For more information, see the Sexual Misconduct Resource Guide found at:

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Students: Students who observe work-restricted religious holy days must be allowed to do so without jeopardizing their academic standing in any course. Faculty are obliged to accommodate students' request(s) for adjustments in course work on the grounds of religious observance, provided that the student(s) make such request(s) in writing during the first two (2) weeks of term.

Deans and department chairs must investigate and resolve student complaints arising from alleged faculty failure to make reasonable accommodations under these guidelines.

- **Statement on Diversity:** The University of Louisville strives to foster and sustain an environment of inclusiveness that empowers us all to achieve our highest potential without fear of prejudice or bias.

We commit ourselves to building an exemplary educational community that offers a nurturing and challenging intellectual climate, a respect for the spectrum of human diversity, and a genuine understanding of the many differences-including race, ethnicity, gender, gender identity/expression, sexual orientation, age, socioeconomic status, disability, religion, national origin or military status-that enrich a vibrant metropolitan research university.

We expect every member of our academic family to embrace the underlying values of this vision and to demonstrate a strong commitment to attracting, retaining, and supporting students, faculty and staff who reflect the diversity of our larger society.

Student Success

- **Office Hours:** The instructor offers office hours between Monday and Friday. Feel free to visit my office hours (appointments are *recommended*, though not required). Or, you can email me to schedule a conference.
- **Resources**
 - **The Writing Center.** The University Writing Center is committed to supporting the writing of distance education students. If you are taking a distance education course and cannot make a face-to-face appointment at the Writing Center, you can schedule an online consultation through their Virtual Writing Center. They provide both online live chat sessions and, when that's not possible, they can respond to your draft in writing through an eTutoring session. Learn more at the [Writing Center](#) website.
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Course Organization

Module	Start Date	Topic	Activities/Assignments	Due Date
Introductions		Introductions and Expectations	BlackBoard Becomes Available Complete all Orientation Activities	
Module 1		Preparing and Managing Organizational Transition	Chapter Reading Discussion Board Minicase	
Module 2		Preparing and helping Next Generations Members find their role in the family business	Chapter Reading	
Module 3		The current generation and their exit planning.	Chapter Reading	
Module 4		Understanding Succession and the succession planning process.	Chapter Reading	
Module 5		Tools that can help families manage the Transition Process	Chapter Reading	

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Instructor and Course Information

Instructor:	Vaughan Scott, MBA
E-mail:	vaughan.scott@louisville.edu
Office Location:	College of Business U of L
Phone:	xxx
Office Hours:	By Appointment – we can use any platform (teams, zoom, skype, Google Hangouts)
Class Website:	BlackBoard (https://blackboard.louisville.edu)
Course Availability:	XXX
Course Start Date:	XXX
Course Ending Date:	XXX

I will respond to email and phone calls within 24 hours in most cases, 48 hours on weekends or holidays. If you do not receive a response within that time period, please reach out again.

Course Description:

This course outlines the system structures, processes, and policies that family business can use to diminish the problems that can arise from a conflict of interest between stakeholders of the firm. Students will learn about the different types of governance that family businesses can use, and how these can help in the continuity of the family and the business.

Prerequisite: **No pre-requisites.**

Required Materials

Aronoff, C.E., & Ward, J. L. (2011). *Family Business Governance: Maximizing Family and Business Potential*. Palgrave Macmillan. ISBN: 978-0230111066.

Additional readings provided through class website.

Course Learning Objectives:

By the end of this course students will be able to:

1. Explain why governance is important for family enterprises.
2. Describe the different types of governance practices available to family enterprises.
3. Identify the benefits and challenges of each governance practice.
4. Match different governance practice with family business needs.
5. Assess the governance needs of business owning families.
6. Explain the role of governance in the sustainability of family firms.

Taking an Online Class

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 - **Technical Support.** If you need technical support with your university account, unlocking your password, accessing wireless, Blackboard or other technical issues, contact the HelpDesk at (502) 852-7997. You can chat with a support expert or submit an email by visiting the [HelpDesk Resources](#) website. Many useful videos can be found at the [Blackboard 9.1 Help](#) page

Course Organization

Module	Start Date	Topic	Activities/Assignments	Due Date
Introductions		Introductions and Expectations	BlackBoard Becomes Available Complete all Orientation Activities	
Module 1		Role of Governance in the Continuity of Family Enterprises	Chapter Reading BlackBoard Activities	
Module 2		Business Governance	Chapter Reading BlackBoard Activities	
Module 3		Family Governance	Chapter Reading BlackBoard Activities	
Module 4		Ownership Governance	Chapter Reading BlackBoard Activities	
Module 5		Developing and Managing Family Business Governance mechanisms.	Chapter Reading BlackBoard Activities	

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Instructor and Course Information

Instructor: Vaughan Scott, MBA
E-mail: xxx
Office Location: xxx
Phone: xxx
Office Hours: By Appointment – we can use any platform (teams, zoom, skype, Google Hangouts)
Class Website: [BlackBoard](https://blackboard.louisville.edu) (<https://blackboard.louisville.edu>)
Course Availability: XXX
Course Start Date: XXX
Course Ending Date: XXX

I will respond to email and phone calls within 24 hours in most cases, 48 hours on weekends or holidays. If you do not receive a response within that time period, please reach out again.

Course Description:

This course discusses how families can plan to manage and retain their wealth. It will outline tools that can be considered in this process and identifies the challenges and opportunities that these tools provide to the business family. The emphasis of the course is on the development of a set of tools, vocabulary, knowledge, and skills needed to understand and plan for the management of the family and business wealth. The course emphasizes the importance of wealth management for the continuity of the family enterprise.

Prerequisite: No pre-requisites.

Required Materials

Lansky, D. (2016). *Family Wealth Continuity: Building a Foundation for the Future*. Springer.
ISBN: 978-1137576392.

Additional readings provided through class website.

Course Learning Objectives:

By the end of this course students will be able to:

1. Understand the unique wealth needs of business owning families.
2. Explain the how family and business goals influence the approach to family wealth that business families use.
3. Identify the different tools and practices available for business families to plan for and manage their wealth.
4. Describe the role of family offices in helping the wealth needs of business owning families.

5. Assess what the wealth needs of the family are.
6. Identify which wealth management practices business owning families should use based on their needs.

Taking an Online Class

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My role as the instructor is to be here to support and help you, but it is up to you to ask for help when you need it. Unlike face-to-face classes, I cannot see the confused look on your face when something doesn't make sense.

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For your privacy and security, *only* your official U of L email account will be used for email communication. No information will be sent to personal email accounts. Please check your U of L email daily.

Teaching Methods & Evaluation:

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Each Module has a due date, and you cannot move on to the next Module until you have submitted all activities for the previous one. However, if you finish a Module early, you may move on and work ahead on the next Module.

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Discussion Boards	20	100
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Personal Journal	10	50
Student Interaction	10	50
Final Comprehensive Case		50
Total		400

- ***Reading Brief:*** Students will prepare a reading brief based on the reading assignments for each module. The reading brief answers the following questions:
 - What are your key takeaways from the assigned readings?
 - How does the information from the readings help you better understand family firms?
 - Given the readings:
 - What do you believe are key knowledge areas that you need to have to work with family firms? - Explain why.
 - What are key skills and abilities that you need to be able to work with family firms? – Explain why?
 - What are three questions that come to your mind after these readings?
 - What are two ways that you can use the information you learned when interacting with family firms?

The brief is intended to help you summarize in your own words the key takeaways from each module and their application.

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- ***Personal Journal:*** Students will complete a set of self-assessments and then write a short

analysis of how their results would influence their capability to work with their family or with other family business.

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Grading

The final grade is based on the following scale:

Grade	Percentage	Grade	Percentage	Grade	Percentage
A+	97 to 100	A	93 to 96	A-	90 to 92
B +	87 to 89	B	83 to 86	B-	80 to 82
C +	77-79	C	73-76	C-	70-72
D	60-69	F	0-59		

Note: *The grading scale cutoffs have already been rounded. Thus, there will be no negotiation regarding final grades – even for grades that are .5 points from the next higher grade.*

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 - Be sensitive to the fact that there will be cultural and linguistic backgrounds, as well as different political and religious beliefs, plus just differences in general.
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 - Don't use all capital letters when composing your responses as this is considered "shouting" on the Internet and is regarded as impolite or aggressive. It can also be stressful on the eye when trying to read your message.
 - Be respectful of your others' views and opinions. Avoid "flaming" (publicly attacking or insulting) them as this can cause hurt feelings and decrease the chances of getting all different types of points of view.
 - Be careful when using acronyms. If you use an acronym it is best to spell out its meaning first, then put the acronym in parentheses afterward, for example: Frequently Asked Questions (FAQs). After that you can use the acronym freely throughout your message.
 - Use good grammar and spelling, and avoid using text messaging shortcuts.
- **Academic Integrity Policy:** Academic dishonesty is prohibited at the University of Louisville. It is a serious offense because it diminishes the quality of scholarship, makes

accurate evaluation of student progress impossible, and defrauds those in society who must ultimately depend upon the knowledge and integrity of the institution and its students and faculty.

A plea of ignorance is not acceptable as a defense against the charge of academic dishonesty.

When students submit work purporting to be their own, but which in any way borrows ideas, organization, wording or anything else from another source without appropriate acknowledgement of the fact, the students are guilty of plagiarism. Plagiarism includes reproducing someone else's work, whether it be a published article, chapter of a book, a paper from a friend or some file, or something similar to this. Plagiarism also includes the practice of employing or allowing another person to alter or revise the work, which a student submits as his/her own, whoever that other person may be.

When a student's assignment involves research using outside sources of information, the student must carefully acknowledge exactly what, where and how he/she employed them. If the words of someone else are used, the student must put quotation marks around the passage in question and add an appropriate indication of its origin. Making simple changes while leaving the organization, content and phraseology intact is plagiaristic.

- **Accessibility Needs:** The university of Louisville is committed to providing access to programs and services for qualified students with disabilities. If you are a student with a disability and require accommodation to participate and complete requirements in this class, notify me immediately and contact the Disability Resource Center (119 Stevenson Hall, 502-852-6938) for verification of eligibility and determination of specific accommodations. Please also review information at:
 - <https://louisville.edu/disability>
- **Grade Appeals:** If you feel that an inadvertent error has been made in the grading of an individual assignment, or in assessing an overall course grade, please submit a request to have that grade re-evaluated. Such request should be submitted in writing to me within 7 days of receiving the grade, including a brief argument for why you believe an error in grading has been made. I will then reevaluate the contested material and your grade may increase or decrease as a result.

University Guidelines and Policies

- **Title IX/Clergy Act Notification:** Sexual misconduct (including sexual harassment, sexual assault, and any other nonconsensual behavior of a sexual nature) and sex discrimination violate University policies. Students experiencing such behavior may obtain confidential support from the PEACC Program (852-2663), Counseling Center (852-6585), and Campus Health Services (852-6479). To report sexual misconduct or sex discrimination, contact the Dean of Students (852-5787) or University of Louisville Police (852-6111).

Disclosure to **University faculty or instructors** of sexual misconduct, domestic violence, dating violence, or sex discrimination occurring on campus, in a University-sponsored program, or involving a campus visitor or University student or employee (whether current or former) is **not confidential** under Title IX. Faculty and instructors must forward such reports, including names and circumstances, to the University's Title IX officer.

For more information, see the Sexual Misconduct Resource Guide found at:

- <http://louisville.edu/hr/employeerelations/sexual-misconduct-brochure>
- **Religious Holy Days and Observances:** Federal law and university policy prohibit discrimination on the basis of religious belief. It is the policy of the University of Louisville to accommodate students, faculty, and staff who observe religious work-restricted holy days.
Students: Students who observe work-restricted religious holy days must be allowed to do so without jeopardizing their academic standing in any course. Faculty are obliged to accommodate students' request(s) for adjustments in course work on the grounds of religious observance, provided that the student(s) make such request(s) in writing during the first two (2) weeks of term.
Deans and department chairs must investigate and resolve student complaints arising from alleged faculty failure to make reasonable accommodations under these guidelines.
- **Statement on Diversity:** The University of Louisville strives to foster and sustain an environment of inclusiveness that empowers us all to achieve our highest potential without fear of prejudice or bias.
We commit ourselves to building an exemplary educational community that offers a nurturing and challenging intellectual climate, a respect for the spectrum of human diversity, and a genuine understanding of the many differences-including race, ethnicity, gender, gender identity/expression, sexual orientation, age, socioeconomic status, disability, religion, national origin or military status-that enrich a vibrant metropolitan research university.
We expect every member of our academic family to embrace the underlying values of this vision and to demonstrate a strong commitment to attracting, retaining, and supporting students, faculty and staff who reflect the diversity of our larger society.

Student Success

- **Office Hours:** The instructor offers office hours between Monday and Friday. Feel free to visit my office hours (appointments are *recommended*, though not required). Or, you can email me to schedule a conference.
- **Resources**
 - **The Writing Center.** The University Writing Center is committed to supporting the writing of distance education students. If you are taking a distance education course and cannot make a face-to-face appointment at the Writing Center, you can schedule an online consultation through their Virtual Writing Center. They provide both online live chat sessions and, when that's not possible, they can respond to your draft in writing through an eTutoring session. Learn more at the [Writing Center](#) website.
 - **Library Services.** Library services are available for students in distance education-online courses, including off-campus access to online databases and Electronic Course Reserves. The UofL librarians are available to assist you with library services. For more information view the [Library Services for Distance Education and Online Courses page](#).
 - **Technical Support.** If you need technical support with your university account, unlocking your password, accessing wireless, Blackboard or other technical issues, contact the HelpDesk at (502) 852-7997. You can chat with a support expert or

submit an email by visiting the [HelpDesk Resources](#) website. Many useful videos can be found at the [Blackboard 9.1 Help](#) page

Course Organization

Module	Start Date	Topic	Activities/Assignments	Due Date
Introductions		Introductions and Expectations	BlackBoard Becomes Available Complete all Orientation Activities	
Module 1		The role of family financial and non-financial goals in wealth planning.	Chapter Reading	
Module 2		Family Offices	Chapter Reading	
Module 3		State Planning	Chapter Reading	
Module 4		Philanthropy	Chapter Reading	
Module 5		Helping families achieve their financial and non-financial goals.	Chapter Reading	

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Instructor and Course Information

Instructor: Greg Pestinger, MBA
E-mail: XXX
Office Location: XXX
Phone: XXX
Office Hours: By Appointment – we can use any platform (teams, zoom, skype, Google Hangouts)
Class Website: [BlackBoard](https://blackboard.louisville.edu) (<https://blackboard.louisville.edu>)
Course Availability: XXX
Course Start Date: XXX
Course Ending Date: XXX

I will respond to email and phone calls within 24 hours in most cases, 48 hours on weekends or holidays. If you do not receive a response within that time period, please reach out again.

Course Description:

Students in this course will learn about the competencies that leaders in family businesses would benefit from having. Students will complete multiple self-assessments to understand their strengths and areas of improvements needed to successfully work in/with family businesses. The emphasis of the course is on the development and understanding regarding each person's skills and abilities and how they can impact their role inside the family business or their interactions with family businesses.

Prerequisite: No pre-requisites.

Required Materials

Flamholtz, E. G., & Randle, Y. (2016). *Building family business champions*. Stanford University Press.

Additional readings provided through class website.

Course Learning Objectives:

By the end of this course students will be able to:

1. Identify the different competencies necessary to be able to lead family businesses as family members or advisors.
2. Understand a person's skills and how they can be useful and challenging when working with family businesses.
3. Explain how family leaders imprint the legacy of their family and business.
4. Develop and communicate a basic coaching plan for family business leaders.

5. Identify tools available to assess and help family business leaders.

Taking an Online Class

Taking an online class is different than taking a face-to-face class. Without lectures, you will be teaching yourself to learn. That's what life-long learning is all about. You will also do most of your communicating by writing. As a result, there will likely be more writing than in face-to-face classes.

Class communication is largely asynchronous, which means that everyone is not participating in the class at the same time. You can access the course any time, day or night, from anywhere that you have an internet connection.

The roles of the teacher and the student are different than you may be used to. I am a facilitator, guide, coach, or resource. My job is to create an effective learning environment. Your job is to use that environment to learn – interact with the materials, construct and share information, manage your time effectively, and use that time for critical thinking, reflection and application. You are in control and responsible for your own learning.

My role as the instructor is to be here to support and help you, but it is up to you to ask for help when you need it. Unlike face-to-face classes, I cannot see the confused look on your face when something doesn't make sense.

Make sure that you are setting aside enough time for this course. Many students expect to spend about 3.5 hours per module, since that is what they usually spend attending a face-to-face course. However, they don't consider the time they spend outside of class reading, studying, and doing assignments. With this in mind, you should plan to spend between 6 and 7 hours per module on average.

Technology Expectations

Because this course is held completely online, you will need to have access to a computer and reliable high speed internet. If you do not have access at home, you may be able to use a public library or come to campus to use computers in the library or one of the IT student computer labs. Make sure that you will have access several hours per week and that the computer allows you to upload and download files as well as play audio and video.

You must be able to use internet search tools, access Blackboard, use email, and know how to download and upload documents. You must also be able to play videos and have headphones or speakers.

All written assignments should be completed using Microsoft Word. Please use a virus checker on all documents before submitting them. As a student, you can get a free copy of Word and other Microsoft software. Visit [Microsoft Office365 Pro Plus for Students](https://louisville.edu/email/office-365-proplus-for-students/microsoft-office-365-proplus-for-students/) (<https://louisville.edu/email/office-365-proplus-for-students/microsoft-office-365-proplus-for-students/>) for more information.

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Course Organization

Module	Start Date	Topic	Activities/Assignments	Due Date
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Module 1		The Leader in you: The importance of Self Awareness for becoming a good leader.	Chapter Reading Discussion Board	
Module 2		Setting, Adapting, and Communication your Vision	Chapter Reading	
Module 3		Working with Family and Non-family Members	Chapter Reading	
Module 4		Developing a Family Legacy	Chapter Reading	
Module 5		Coaching Family Leaders	Chapter Reading	

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