

**MGMT 5300 – Family-Owned Business
Spring 2021
Seattle University – Albers School of Business**

Instructor

Martin Acevedo –SU Adjunct Professor
Global Energy Resources LLC – Founder/CEO
Maximus Capital LLC – Founder/Managing Partner

Contact

SU Office: by appt
Mobile Phone: 425-466-7484

Hours: By appointment
Email: acevedom@seattleu.edu

Class information

Class Web site: on Canvas (your login and password are your full SU e-mail address and pw, including the @seattleu.edu portion on the Canvas login page).

Time/Location

Wednesday 6:00 pm-8:40 pm Online. The first-class session is on March 31, 2021.

Readings

HBR: Will be announced in Canvas.

Textbook: Understanding The Family Business (Entrepreneurship & Small Business Management Collection) 1st or 2nd edition, Keanon J. Alderson

Course Description

This course explores the management, family, career and personal issues found in family-owned and managed companies. The course develops a student's understanding of these organizations and skills to address the challenges family companies and families in business face. Primary subject areas include how family business ownership systems evolve; managing of ownership conflict with family relationships; changing family business structures and responsibilities; women's issues in family businesses; managing succession and continuity; designing effective business boards and family governance; and best practices in family business management. The course develops a student's understanding of family organizations and skills necessary to be effective. Upon completion, a student should fully understand many of the complexities associated with operating a family business enterprise.

Evaluation

Course deliverables will be evaluated on a points basis. Total points will be converted into a final percentage score at the end of the quarter and assigned a letter grade according to the grading scale in Canvas.

Assignment	Responsibility	Total points available
Discussion posts (weekly)	Individual (10 pts each)	100
Research paper (10 pages) on selected topic	Individual	150
Personal Generational Wealth Strategy Paper	Individual	150
Take home final exam	Individual	100

Total Points:

500

1) Graded discussion posts: (100 points) There will be weekly discussion threads during the quarter. Posted questions may touch on material covered by the guest lecturer or relate to class lecture materials to reinforce course concepts. You are not expected to post anything lengthy. A few sentences to a few paragraphs is sufficient, given you provide a substantive insight, comment, observation or question. You may also reply to a classmate's post as well, and further the conversation that way. Each week's discussion post is worth a total of 10 points, or **100 points** maximum score for the quarter.

2) Research paper on selected topic: (150 points) Given that each of you will have your own personal interest in the topic of family business, you will select a research topic of interest to you and write a paper expounding on the subject. Your paper should include at least 5 academic references (properly cited in end notes), and be at least 10 pages in length, double space 12-point font. Please submit your topic to instructor by end of the 3rd week of class for approval.

3) Personal Generational Wealth Strategy Paper: (150 points) Over the course of the quarter, you will be exposed to different strategies to build, govern, and pass on a successful family business. Governance and succession issues are complex and require advance planning for the best outcomes. Even if you do not have your own family business as of yet, over the course of your careers, I have no doubt you will use your skills to develop the foundation for generational wealth. As such, you will use course concepts to write a paper describing your own personal generational wealth strategy. Ideas of topics to be covered will be discussed in class. For at least two of your strategies, please discuss and include an academic reference supporting your strategy. Describe what the research indicates are key success factors for the strategy you have chosen.

6) Final exam: (100 points): The final exam will consist of multiple choice/short answer questions designed to test your objective knowledge from the textbook or case studies. It will be open book, on Canvas, and timed.

Total course points available: 500

Grading Scale: A: 93+, A-: 90-92, B+: 87-89, B: 83-86, B-: 80-82.....D-: 60-62, F: <60

Academic Honesty

Seattle University is committed to the principle that academic honesty and integrity are important values in the educational process. Academic dishonesty in any form is a serious offense against the academic community. Acts of academic dishonesty will be addressed according to the Seattle University Academic Honesty Policy. If you are not sure whether a particular action is acceptable according to the Academic Honesty Policy, you should check with your instructor before engaging in it.

Academic Resources

- Library and Learning Commons (<http://www.seattleu.edu/learningcommons/>)
(This includes: Learning Assistance Programs, Research [Library] Services, Writing Center, Math Lab)
- Academic Integrity Tutorial (found on Canvas and SU Online)

Academic Policies on Registrar website (<https://www.seattleu.edu/redhawk-axis/academic-policies/>)

- Academic Integrity Policy
- Academic Grading Grievance Policy
- Professional Conduct Policy (only for those professional programs to which it applies)

Notice for students concerning Disabilities

If you have, or think you may have, a disability (including an ‘invisible disability’ such as a learning disability, a chronic health problem, or a mental health condition) that interferes with your performance as a student in this class, you are encouraged to arrange support services and/or accommodations through Disabilities Services staff located in Loyola 100, (206) 296-5740. Disability-based adjustments to course expectations can be arranged only through this process.

Notice Regarding Religious Accommodations

It is the policy of Seattle University to reasonably accommodate students who, due to the observance of religious holidays, expect to be absent or endure a significant hardship during certain days of their academic course or program. Please see, *Policy on Religious Accommodations for Students* (<https://www.seattleu.edu/media/policies/Policy-on-Religious-Accommodations-for-Students---FINAL.PDF>).

Office of Institutional Equity

Title IX of the Education Amendments of 1972 (Title IX) prohibits discrimination based on sex in educational programs or activities that receive Federal financial assistance. This prohibition includes sexual misconduct, which encompasses sexual harassment and sexual violence. Seattle U remains committed to providing a safe and equitable learning, living, and working environment. Seattle U offers emergency, medical, and other support resources, as well as assistance with safety and support measures, to community members who have experienced or been impacted by sexual misconduct.

Seattle U requires all faculty and staff to notify the University’s Title IX Coordinator if they become aware of any incident of sexual misconduct experienced by a student.

For more information, please visit <https://www.seattleu.edu/equity/>. If you have any questions or concerns, you may also directly contact the Title IX Coordinator in the Office of Institutional Equity (email: oiie@seattleu.edu; phone: 206.296.2824) University Resources