

**ENHANCING SBI STUDENT CONSULTING COMPETENCIES - Part II:
A DECADE LONG (AAR) AFTER ACTION REPORT**

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ABSTRACT

The majority of the literature related to the Small Business Institute (SBI) focuses on business clients, faculty development, SBA resources and less often on the student. This is the second paper in a series which shares student data related to recommendations shared in "SBI After Action Reports." The data represents 22 sections, 248 projects and 427 SBI students. Overall themes focused on the SBI program providing: Realistic Consulting Opportunities, Enhanced Time Management Skills, and Clients Quality Recommendations. Secondary themes focused on Effective Research Development, Promotional Ideas for Clients and Initiation of Changes for clients and their organizations.

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ABSTRACT

The majority of the literature related to the Small Business Institute (SBI) focuses on business clients, faculty development, SBA resources and less often on the student. This is the second paper in a series which shares student data related to recommendations shared in "SBI After Action Reports." The data represents 22 sections, 248 projects and 427 SBI students. Overall themes focused on the SBI program providing: Realistic Consulting Opportunities, Enhanced Time Management Skills, and Clients Quality Recommendations. Secondary themes focused on Effective Research Development, Promotional Ideas for Clients and Initiation of Changes for clients and their organizations.

INTRODUCTION

Originating in 1972 the mission of the SBI program was to expand SBA resources, leverage university faculty member talents, and develop student competencies all focused on helping small business organizations. At most schools' priority was given to SBA loan recipients, particularly during the early years. Since 1974 our university has been actively involved in the SBI program. The program has operated in a variety of formats and been delivered by different departments. (Anderson, Elbert, Floyd, 1984). A 1989 accreditation curriculum self-review effort resulted in several individual courses being eliminated. The SBI course was renamed Marketing 430: Small Business Projects.

Since 1974 a variety of undergraduate and graduate students from various disciplines have taken advantage of the opportunities provide by the SBI course. Up to 1994, the course was offered each semester. Occasionally graduate students from other disciplines (Communications, Industrial Technology, Engineering) would also take the course, after completing the required prerequisites. During an expansion of the curriculum in 1999 to include an Entrepreneurship Track (consisting of a five-course sequence for both business and non-business majors)

and an Entrepreneurship major in 2000, the SBI course will be included in the newly developed and expanded entrepreneurship curriculum offerings.

During the curriculum transition the SBI After Action Report database was compiled, analyzed, and content categorized. The new Entrepreneurship Curriculum options will continue to maintain the affiliation with the SBA, SCORE, SBDC and the University Center for Innovation - Rural Technology Center. These service providers have been extensively involved in client selection, project development and even in final SBI report presentation. The database provides an extensive pool of information which is of value for other SBI programs which may also be going through significant change. As universities have tried to maintain SBI programs without SBA financial support many creative options have been reviewed.

The purpose of this (Part II) paper is to share content analysis categorized anecdotal comment data gathered over a decade as part of the student/faculty advisor SBI After Action Report. The information was obtained during the post presentation SBI briefings conducted each semester. The review also included video presentation analysis.(Elbert & Harmeson, 1997) The initial presentation of video findings at the 1997 SBIDA Conference and the positive comments by participants at the 1998 and 1999 conferences (Elbert & Harmeson, 1999) served as a catalyst for this continued effort regarding service to the student client.

This paper provides Part II details of the SBI After Action Reports. Because of the sheer volume of information and the ever-expanding data base, it was suggested that the authors to develop a three-part series. The impact of the new expanded Entrepreneurship Track and Program will undoubtedly change the direction and emphasis even more. It is our intent to continue the theme of reviewing SBI curriculum options to best serve our student client.

OBJECTIVES

The local SCORE advisory panel recommended a variety of changes to SBI program delivery in the early 1980s. The video tape procedure noted above was a major recommendation. Additionally, it was recommended that a detailed After Action Report be completed each semester. The value for the After Action Report would be an ongoing review of student experience, the maintenance of faculty transition information as SBI Directors changed and more positive use of outside support consultants to include SCORE and SBDC reps, and of course enhanced service to the business client. At that time SCORE counselors were emphasizing 'Continuation Plans' for their clients. This emphasis impacted on their guidance for the SBI program. The SBI After Action Reports became our 'Continuation Plan' for a structured semester, annual, and period program review of the SBI experience.

REVIEW OF LITERATURE

Skills necessary to be a successful business student and a successful entrepreneur are very similar. As many SBI Coordinators can share, real world issues of time pressures which inhibit progress are reality in the SBI experience (Ames, 1998). While much of the SBI student centered research has emphasized components of program and course delivery (Watts, Jackson, 1994), some programs have reviewed other curriculum areas. SBI program issues related to students (Fontenot, Franklin, Hoffman, 1994), presentation skills (Elbert, Harmeson, 1998) improving reports to clients (Sellaro, Maskulka, Thode, 1998) and counseling techniques (Anderson, Elbert, 1987) have centered on development of student skills.

Due to an emphasis on program funding and a review of options for SBI program survival student issues may have had to take a lower priority position in more recent years. Discussion has focused on SBI program status (Brennan, Hutchens, Begley, 1994) and use of outside resources like SCORE to improve the student experience (Alpi, Decker, 1993). Still SBI competencies of hands-on experience, experiential training to leverage text and classroom knowledge, program participation to help students decide if the want to start a business or stay in the family firm are all cited as critical benefits of the SBI Program (Cook, 1999). Connections with entrepreneurship and motivation (Hostager, Decker, 1999), student skill assessment (Wallace, 1999), improvement of faculty writing skills through good case development (Watkins, 1999) and refinement of student competencies (Wallace,

1998) are all evidence of a return to basic SBI pedagogy improvement. The student experience should not be viewed as a secondary course outcome with primary emphasis on the business client. The student experience must continually reviewed, enhanced, and improved to make sure that our student is not the "forgotten client" in the SBI process.

METHODOLOGY

SBI student consultants normally participate in a variety of oral and written communication activities and events as part of their educational experience in the class or program. Often the final report and presentation of findings are the last major events in the SBI experience. Our experience has been improved by taking this learning step one notch further. A formal debriefing a few days after the final presentation is used to bring the project to closure. The debriefing process for more than a decade has included the following sequence of five items:

SBI Project Debriefing Component

1. Videotape Feedback Information
2. Written/Oral After Action Reports
3. Completion of Expense Forms
4. Final SBI Checklist Review
5. Lessons Learned
 - a. Small Group Discussion
 - b. Individual/Team Review

After Action Reports have provided students with the opportunity to share their experiences, success stories, horror stories and 'what if I could do it over again' type discussion. For the past decade plus (22 class sections, 248 projects, 427 student consultants) the ten question report form has been utilized to compile feedback information each semester. This paper shares a Part II review of the aggregated data and an overview of the lessons learned.

Every semester the comments were compiled and reviewed by the SBI Director as part of the normal evaluation procedures. Occasionally suggestions were shared with the SCORE, SBDC, and college administration. More than 150 pages of anecdotal comments were compiled over the past decade. This paper shares categorized comment analysis data for Qs. 5 - 7. The volume of information is too numerous to share in one paper, Q 1 - 4 are included in the 2000 SBIDA proceedings. It is anticipated that the final component along with overview recommendations will be shared at the SBIDA 2002 conference.

The questions utilized as part of the Small Business Institute After Action Report were as follows:

1. What was the one best learning experience you gained from the course?
2. What would you do differently if you had the opportunity to start the course over again?
3. What do you feel you accomplished for your client?
4. What was the one thing you could not accomplish for your client?
5. How would you change the course and/or project to make it a better learning experience?
6. What suggestions would you offer to insure future SCORE and/or SBDC involvement?
7. Team Projects. Should you be able to fire a team member who is not doing their share of the work?
8. How can UND get more students interested in the SBI program?
9. What overall grade do you feel you have earned for the course? Why?
10. Other comments

The comments were reviewed, compiled and then integrated into an ever expanding data base each semester. The authors “some day we will” intent was to utilize the information for a single SBIDA conference or educational journal article. Given the transition from singular SBI and Entrepreneurship courses in Marketing and Management to a college wide Entrepreneurship Track and Program the time seemed appropriate to develop the material for a series. This concept was endorsed at the 1999 SBIDA conference. The intent is to report Q8 - 10 information and final overall recommendations in Part III.

AFTER ACTION REPORT RESPONSES

Based on convenience, the comments were content analyzed and categorized into two groupings. The primary reason for the groupings was a change in the wording of the questionnaire in 1991. To insure categorization consistency, all categorization was completed by the same individual. Due to the catastrophic event of the flood of 1997, there were no data available for spring semester projects of that

year. It is anticipated that the comments would be similar to other year end comments of that time. See Table 1 for categorized information on Q5 - 7.

The categorized comments to Q5: How would you change the course and/or project to make it a better learning experience?

The main response over the years has been “Provide more regular and earlier feedback from the client, instructor and SCORE....”or 24.14% of the responses. The categorized comments shown in Table 1 reflect other themes to include Focused Project Issues, No Course Testing, Using Established/Screened Clients, and Developing a Two Semester Course Sequence. Typical of the comments for Q5 are as follows:

- # Make it a two semester class. Too much work for just 3 credits!
- # Outline precise expectations. Incorporate more in-class time discussion between groups. Just talking outside of class gave me incentive about tackling a client issue.
- # More in-class discussion of what all the teams are experiencing with their clients.

The categorized comments to Q6: What suggestions would you offer to insure future SCORE and/or SBDC involvement?

The predominant response was tied to inclusion of SBDC and SCORE representatives in the class discussions. However only 23.63% of the responses were tied to this theme. This category was followed by Use of Field Trips, More Consultant to Consultant Time, and Assignment to Teams Procedures. (Note our procedures are to match a student and client from a project pool. Typically students get one of their top 3 choices, so the students themselves pick their project.) Typical comments for Q2 were:

- # Mainly, just reiterate to SCORE and SBDC that their involvement is very much appreciated and is very valuable to the SBI program. Their involvement is important to the success of the SBI.
- # Involvement – I enjoyed having them there.
- # Be present at the mid-term presentation and meet with the class about 3 - 4 times during the semester.

The categorized comments to Q7: Team Projects. Should you be able to fire a team member who is not doing their share of the work? Why?

The predominant response here was ‘Yes’ with 62.71%/116 comments and 24.84%/46 comments as ‘No.’ (It is interesting to note that in reality, very few students are willing to take this step. Our experience in the decade under review was that less than 6 teams actually fired a member). Sample Q7/7a comments were:

- # No, not if the class is free to choose their partner. If you choose a partner who is lazy, you are responsible. You should choose a partner whom you know is competent.
- # Yes – it could happen in real life.
- # As a last resort this may be an alternative. It would be hard to set what the “share of work” should be.
- # No, it is just another “slice of reality.”

The categorized comments to Q7a: Why?

The main area of response here Poor Work (32.95%/57 comments). The remainder of the responses were scattered with the No Response being the next largest grouping (24.86%/43 responses). Typical Q7a comments were:

- # No. Must learn how to deal and perhaps inspire those who are not doing his/her share of the work.
- # Yes, I think so, because this class is supposed to be as close to real life as possible. So, if a partner isn’t doing their work, then they should know now that they have to pull their weight or they are out.
- # Yes, getting stuck with a loser would really hurt your own grade.

I don’t know if fire is a good term. Maybe have verbal and then a written warning. And if that doesn’t work - they get dropped from the class.

- # No. Some sort of disciplinary action should be taken though.
- # Yes. This type of project really requires a lot of work. It isn’t fair for one partner to coast.

IMPLICATIONS

Our university has offered an experiential learning experience via the SBI program for more than 25 years. We are now in curriculum transition from selected single courses to a new Entrepreneurship Track consisting of a five course sequence for nonbusiness majors and a multi course program major for business majors. We have been in a process of review and analysis for needed change. The student comment data compiled for over a decade as part of the SBI After Action Report provides an insight into the value of the not only the course but also the process. In a wider perspective we are considering the AAR information as one piece of future directions related to Entrepreneurship Education.

SBI instructors typically consider their teaching role as one of “Coach, Facilitator, or Coordinator.” In this more involved role we must insure that our students do not become the “forgotten client.” As an example, our institution is going through a campus wide process of strategic planning. The State Board for Higher Education has continually emphasized the role of economic development as part of our mission. While most business faculty would not discount this emphasis (a differing perspective from many of our liberal arts colleagues) the dimension of our college mission we must not forget is the core value....WE SERVE STUDENTS.

THE FUTURE

Our University, College and Business Curriculum is in the process of continual review and change. The College of Business and Public Administration reorganized in AY 1998-99. In an attempt to better serve our students, we moved from an eight departments to a three academic division structure, with the primary goal of becoming more interdisciplinary. The Center for Innovation - Rural Technology Center and business incubator was moved to the college in AY 97-98. We now have a learning lab along with the SBDC which allows our students faculty and staff multiple resources and activities. The focus on Entrepreneurship Track and Program will allow us to integrate the SBI experience into a variety of curriculum options. Initial concerns about loss of SBI role and/or identity have proven to be without justification. The SBI traditions of the past in reality have helped forge the expanded role of entrepreneurship at our university. This more visionary approach will not only enhance the student learning experience but also serve our region’s business clients even more effectively in the future.

Table 1: Categorized Comment Data, 1987 - 1998: Small Business After Action Report - Part II

5*. How would you change the course and/or project to make it a better learning										
	Focus Project	More/Earlier Feedback	No Tests	No Changes	Est'd Businesses/ Screen Clients	No Book Needed	Team Members	Two Semester Course	Other	Total
1987-1991	6	30	24	20	17	9	8	12	16	142
1992-1998	4	33	0	41	12	1	11	13	4	119
Total	10	63	24	61	29	10	19	25	20	261
Percentage	3.83%	24.14%	9.20%	23.37%	11.11%	3.83%	7.28%	9.58%	7.66%	100.00%
6. What suggestions would you offer to ensure future SCORE and/or SBDC involvement?										
	Field Trips	Class Discussions	Letters of Invitation	More Consultant to Consultant Time	No Changes	Testimonials from Former Students	Assign to Teams	Keep Up Interest	Other	Total
1987-1991	2	20	3	11	10	5	20	3	0	74
1992-1998	3	23	1	18	15	11	8	6	23	108
Total	5	43	4	29	25	16	28	9	23	182
Percentage	2.75%	23.63%	2.20%	15.93%	13.74%	8.79%	15.38%	4.95%	12.64%	100.00%
7. On team projects, should you be able to fire a team member who is not doing their share of work?										
	Yes	No	Don't Know/No Response							Total
1987-1991	45	48	9							72
1992-1998	71	28	14							113
Total	116	46	23							185
Percentage	62.70%	24.86%	12.43%							100.00%
7a. Why?										
	No Team Work	Slice of Reality	Poor Work If Justified	Create Interest	Can't Pick Team	Admit Defeat	Last Resort	Lower Grade	No Response	Total
1987-1991	3	10	24	1	2	1	5	2	18	66
1992-1998	3	17	33	1	1	0	19	8	25	107
Total	6	27	57	2	3	1	24	10	43	173
Percentage	3.47%	15.61%	32.95%	1.16%	1.73%	0.58%	13.87%	5.78%	24.86%	100.00%

* The Table with responses to Questions 1-4 are included in the 2000 SBIDA Proceedings

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