

Supply Chain Management
Course Number: 33:799:491
Course Title: Supply Chain Finance

COURSE DESCRIPTION

Supply Chain Management (SCM) is a cross-functional discipline concerned with the movement of products, the use of business resources, the flow of information, and the deployment of services in the value chain.

In this course, students are provided with a review of the business processes, value creating activities, and best practices for a supply chain – from forecasting and demand management, to sourcing and procurement, to sales and operations planning, and through logistics (i.e., warehousing, distribution and transportation), out to the customer. The course covers both the tactical and strategic perspectives of SCM and is based on supply chain operations in the real world. Financial and quantitative models are introduced as needed to foster a critical way of thinking about how decisions are made based upon facts so that greater efficiencies and effectiveness is realized by all supply chain companies and their partners.

Senior executives of leading companies understand the value of the supply chain as a critical driver of shareholder value. In many firms the supply chain includes most of the assets of the firm such as most of the inventory, 60 to 70% of the cost, and is the foundation for generating revenue by providing outstanding product availability.

Firms tend to view the supply chain as primarily a cost center. However, supply chains make revenues possible, and properly developed and managed, can improve profitability. Supply chain organizations of the future must focus on far more than just driving cost and improving product availability.

As Supply Chain organizations evolve from back office tactical operations into strategic functions driving bottom line profitability and enterprise value, it is becoming increasingly more important for supply chain professionals to engage as business partners and “speak the language” of the CFO. It is no longer enough for the supply chain organization to only assure continuous supply and drive down costs. Inside world-class organizations the supply chain function is viewed by senior leadership as a critical success factor to achieving optimal “financial health” reflected on the P&L, balance sheet and funds flow statements. This necessitates that supply chain professional understand the financial impacts of their decisions and actions and are adept at “pulling the right levers” to improve the firm’s financial scorecard.

COURSE MATERIALS

1. e-Book: Supply Chain Finance (McGraw Hill Create). The required eBook for this course can be

purchased for \$86.68 by copying the following link and pasting it into your browser. Instructions for navigating the website is posted under Course Documents.:

2. The e-book ISBN number is: 9781307404562.
3. Ivey Case packet: <https://www.iveycases.com/CoursepackView.aspx?id=24411>
4. Canvas Readings/Additional Readings as assigned

COURSE OBJECTIVES

The objective of this course is:

1. To provide an understanding of basic corporate accounting and the interrelation to supply chain actions and projects.
2. To decompose the supply chain elements which need to be designed and the related costs.
3. To understand the role of working capital across the supply chain and its impact on the financial statements of the business.
4. To understand the scorecard of the CFO and how the supply chain can help drive those metrics as well as how that view differs from what the CSCO measures.
5. To introduce tools and methods to enable both the identification of changes (i.e. strategies, investments, product flows, etc.) that add value, as well as the means to bring “economic justification” to those supply chain decisions and projects.

Classes will consist of:

- Lecture, practical examples, group exercises, current supply chain events, Q&A, and follow-up discussions of the material covered in previous classes.
- Three (3 - 4) Homework Assignments.
- Group Case Study and a Capstone Project presentation.
- Class discussions and interactive assignments.
- Outside guest speakers may also be invited as appropriate.

TEACHING METHODOLOGY

This course will combine lectures with case study discussions ([you must prepare by reading the case studies in advance of each class](#)), and readings and potentially guest executives. The course focuses on developing your understanding of the strategic elements of the Supply Chain that can be managed, as well as operational design issues. While some quantification is important, it is not a predominantly quantitative course.

CLASS PARTICIPATION

Students will be expected to complete the assigned readings and case preparation prior to class. A large portion of the participation grade will be based on students' preparation for class and ability to intelligently discuss the readings and answer questions relevant to the assigned topics.

CANVAS

Students will be expected to visit the class Canvas site often. Readings and additional assignments throughout the term will be posted on the Canvas site. It is the student's responsibility to buy the eBook and the Case studies. All other readings will be placed on the Canvas site.

CAPSTONE PROJECT - "SUPPLY CHAIN IMPROVEMENT "

Utilizing publicly available financial statements, select a **US-based; Publicly traded company** to be the subject of your capstone project. Your choice of company is due to the Professor / Undergraduate Course Assistant by the start of **Week 4 ()** to ensure that no two groups have chosen the same company. You will analyze the financial and accounting issues surrounding a public corporation's supply chain. A fair amount of detail and analysis is expected. It is expected that you will take a supply chain approach, examining at least the firm and two or more of its competitors for benchmarking purposes. If data is not readily available for a competitor, you will be allowed to make reasonable assumptions.

During the final weeks of the course, we will conduct the Capstone presentations for all groups. Here you should prepare a presentation deck (approx. 10-15 slides) with your proposed supply chain improvements, and thoughts on how to execute those improvements. I expect your PowerPoint templates to be professional / business like. All "Supply Chain Improvement" presentations are to last no longer than () minutes and will be followed by short question and answer period from your peers. Evaluation (for your participation grade) will continue through the last presentation. You may contact Managers at your selected company if that enables you to gather more information about the proposed improvements.

Issues to be analyzed across the supply chain can include but are not limited to: profit improvement, total cost of ownership, cash conversion cycle, working capital, return on assets, economic value added, inventory optimization, hedging, risk management, international currency issues, Accounts Receivable and

Accounts Payable analysis, financial network management, and other options if approved by the instructor.

Given the above scenario, your assignment is as follows:

1. Develop an analysis showing where you believe improvements to the company's supply chain may exist. Cite benchmarks, publicly available financial data and knowledge of the company developed from your research.
2. Develop the approximate or estimated value that you believe may be unlocked by making the improvements proposed to your company's supply chain.
3. Build a business case for going forward with your proposed changes
4. Describe the potential problems that could arise if the company were to adopt the changes you recommend and make investments into those changes
5. Outline the risk management strategies that might be employed to ameliorate the problems described.

Students will turn in **both** their PowerPoint presentations and a succinct 15 – 20-page word document detailing the issues/challenges and approach used to support the recommendations on the day of their presentation.

Do not copy material from the Internet without citing the source. If more than seven words in a row is found to have been copied from an Internet or other source without citation, the student will receive a grade of "F" for both the project and the term. **The assignment must be original work.**

PEER EVALUATIONS

At the end of the semester, your team will submit one agreed upon team peer evaluation for the Case Studies and the Capstone Project. This evaluation allows each team to provide me with feedback on each of your team members' contributions in preparing case analyses and the team topic presentation. This gives you an opportunity to inform me of any exceptionally strong or weak contributors on your team. Consistently negative or glowing assessments of a specific team member's contributions will be considered when finalizing the overall project and course grades. During the Capstone Project presentations, teams will be asked to evaluate each presenting team and give them a score based upon a rubric provided by the professor.

ACADEMIC INTEGRITY

I do NOT tolerate cheating. Students are responsible for understanding the RU Academic Integrity Policy <http://academicintegrity.rutgers.edu/>

I will strongly enforce this Policy and pursue *all* violations. On all examinations and assignments, students must sign the RU Honor Pledge, which states, “On my honor, I have neither received nor given any unauthorized assistance on this examination or assignment.” I will screen all written assignments through *SafeAssign* or *Turnitin*, plagiarism detection services that compare the work against a large database of past work. Don’t let cheating destroy your hard-earned opportunity to learn. See business.rutgers.edu/ai for more details.

ATTENDANCE

- Students are expected to attend all classes. Attendance is taken.
- Expect me to attend all class sessions. If I am to be absent, my department chair or I will send you notice via email and Canvas as far in advance as possible with appropriate information and instructions.
- Expect me to arrive on time for each class session. I expect the same of you.

Students are expected to attend all classes and participate in the small group project to receive full credit towards the attendance and participation grade.

- Attendance will be taken for each class following the drop/add period.
 - Attendance will always be taken and may also be taken multiple times during a lecture session.
 - Students are responsible for their own attendance and only their own attendance. **Recording attendance for any other student or any other means is a form of dishonest behavior and a violation of the Rutgers Academic Integrity Policy. Disciplinary action will be taken if you are found to be recording attendance for any other student at any time during the semester.**
 - If you arrive late, i.e., after the attendance has been taken, you must see the professor at the end of class for late sign in. **Chronic lateness will negatively impact your Attendance grade.**
 - **Failure to sign in and record your attendance will result in an unexcused absence unless an excused absence has been granted.**
 - You must be in class for the duration to receive credit for attendance and participation. Note: Attendance may be taken multiple times during a lecture session.
 - Late arrivals or early departures for extenuating circumstances must be reviewed and approved by the professor in advance of class.
 - **Students that have more than 3 unexcused absences (i.e., 4 or more) will receive a progressively reduced attendance and participation grade for the semester.**
 - **Each unexcused absence beyond 3 will reduce the Attendance and Participation grade by 20%** (i.e., 3 or less = 100%, 4 = 80%, 5 = 60%, 6 = 40%, 7 = 20%, 8 or more = 0%)
- If you are to be absent, report your absence in advance at <https://sims.rutgers.edu/ssra/>. Please note that this notification is a courtesy to the instructor and does not constitute an approved absence.

- You may also send me an email at [Q](#) requesting an excused absence. Please include all relevant information. I will confirm or deny your request based on the circumstances and appropriateness of the information you provide.
 - If your absence is due to religious observance, a Rutgers-approved activity, chronic illness, or family emergency/death and you are seeking make-up work, please send an email with full details and supporting documentation preferably in advance, but no later than 24 hours of your absence from class. Upon receipt of documentation, we will discuss options for making up assignments that were missed in class.

Additional information about attendance policies can be found at <http://sasundergrad.rutgers.edu/academics/courses/registration-and-course-policies/attendance-and-cancellation-of-class>

- Class will start on time. Out of respect for your fellow students and for the instructor, please be on time for class. *Arriving more than () minutes late is not acceptable.*
 - ✓ I understand that unforeseen circumstances occasionally arise, particularly for students that are commuting. Please travel safely to class and enter class as quietly as possible if you will be late.
 - ✓ If arriving on time for class will be an on-going problem for you, please notify me so that I am aware of the issue.
- Expect me to remain for the entirety of each class session. I expect the same of you.
- Expect me to prepare properly for each class session. I expect the same of you. Complete all background reading and assignments. You cannot learn if you are not prepared.
- Expect me to participate fully in each class session. I expect the same of you. Stay focused and involved. You cannot learn if you are not paying attention.
- For weather emergencies, please consult the campus home page. If the campus is open, class will be held unless you have heard from me otherwise. I will communicate any changes to our regular class schedule via email and via Canvas as far in advance as possible.
- Professor or student teams may discuss recent news releases, newspaper articles, and view You Tube videos in class. Some of the material from this discussion may be on the tests. If you are not in class, come late, or leave early, you will miss this and may therefore not be able to answer the questions pertaining to this on the tests.

HOMWORK ASSIGNMENTS

- Homework Assignments will be assigned from the course e-book on the Start Date as shown on the Course Schedule (last pages of this document).
- Homework Assignments must be completed and turned in (**typed**) manually **by the beginning of class on the Due Date** for the assignment. **It is the student's responsibility to complete the Homework Assignments during the allocated time, which is generally 1 week.**
- Homework Assignments are all **open note / open textbook**

- **Homework Assignments cannot be made up without prior authorization from the professor.**
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CLASSROOM CONDUCT

- Computers: Utilizing laptops, tablets, etc. during class is not permitted as a rule, except and unless you are using this technology to take notes for this class.
 - Cell Phones: Please silence your phones before class. If you must take an urgent phone call during class, exit the room quietly and quickly to minimize disruptions.
 - Recording Lectures: All unauthorized recordings of class lectures/discussions are prohibited. Recordings to accommodate the needs of individual students must be approved in advance, for personal use during the semester only. Redistribution of approved recordings is prohibited.
 - Side conversations: A quick and quiet clarification or question of a classmate is acceptable, but I do ask that you keep side conversations to a minimum as to not disrupt the class for your peers and me.
 - Questions: *Questions and student interaction is highly desired.* If you have a question, it is likely that other may have the same question as well, so please ask me during class if possible (or after class if necessary) and I will do my best to provide an answer.
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TEST DATE AND POLICY

There one (1) midterm test in this course. The Final is your Capstone project and paper.

Midterm: ()

The midterm test will cover approximately 1/3 of the course material.

Content for test questions will be developed from class lectures/discussions, assigned readings, guest lectures, and student case study presentations. Guidelines for content will be reviewed with the class in advance of the midterm.

The midterm will **not** be returned after grading. Students who would like to review their graded test(s) can come to office hours or make an appointment and review the test(s) in the office.

If you have a disability that influence testing procedures, please provide me with an official letter from the Office of Disability Services at the start of the semester.

During test, the following rules apply:

- Your test will not be accepted without signing the Rutgers Honor Pledge printed on the test.
- **All electronic devices must be shut down and put away for the duration of the test**, along with books, notes, etc.
- Once the test begins, students will NOT be allowed to leave the room (except in an emergency) until the test is completed and turned in. Please use the restroom prior to the test start.
- Students may be required to present a valid Rutgers photo ID to turn in the completed test.

- A make-up test will only be considered with prior review and approval by the professor.
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GRADING POLICY AND COURSE GRADING WEIGHTING METHODOLOGY

Grading

Attendance / Class participation	5%
Midterm Exam	30%
Case Study Presentation & Analysis	15%
Homework (s)	10%
Capstone Project	40%

GRADING SCALE

90.00% - 100%	=	A
87.00% - 89.99%	=	B+
80.00% - 86.99%	=	B
77.00% - 79.99%	=	C+
70.00% - 76.99%	=	C
60.00% - 69.99%	=	D
59.99% and below	=	F

Note: Grades will not be rounded up at the end of the semester.

Other items pertaining to grades:

- All grades will be posted in Canvas as quickly as possible and generally within one week of the assignment submission.
- I do not grade “on a curve.” However, for tests, I will look at the questions that were missed by the class. If a question was frequently missed, I will consider this in assigning the final grades. If any points were added back to the test scores, I will notify the class.
- I will use the “warning grade” roster at the mid-point of the semester as necessary.
- I will gladly answer questions that you have about assignments for clarification and guidance, but out of fairness to all students, I will not “pre-grade” an assignment in advance of final submission.
- **There is no extra credit available in this course.**

- Important note regarding your final grade: Please earn your grade throughout the semester. **Your grade is not subject to negotiation.**
 - If you feel that I have made an error in grading, submit your concern to me in writing with the precise concern/error. If I have made an error, I will gladly correct it, but please be aware that I will only adjust grades if I have made an error.
 - I will not adjust grades based upon outcomes such as a negative impact to a GPA, lost tuition reimbursement, etc.
 - Attempting to influence faculty to obtain a grade that was not earned is a form of dishonest academic behavior.

SUPPORT SERVICES

If you need accommodation for a *disability*, obtain a Letter of Accommodation from the Office of Disability Services. The Office of Disability Services at Rutgers, The State University of New Jersey, provides student-centered and student-inclusive programming in compliance with the Americans with Disabilities Act of 1990, the Americans with Disabilities Act Amendments of 2008, Section 504 of the Rehabilitation Act of 1973, Section 508 of the Rehabilitation Act of 1998, and the New Jersey Law Against Discrimination. More information can be found at ods.rutgers.edu.

[Rutgers University-New Brunswick ODS phone (848)445-6800 or email dsoffice@echo.rutgers.edu]

[Rutgers University-Newark ODS phone (973)353-5375 or email ods@newark.rutgers.edu]

If you are *pregnant*, the Office of Title IX and ADA Compliance is available to assist with any concerns or potential accommodations related to pregnancy.

[Rutgers University-New Brunswick Title IX Coordinator phone (848)932-8200 or email jackie.moran@rutgers.edu]

[Rutgers University-Newark Office of Title IX and ADA Compliance phone (973)353-1906 or email TitleIX@newark.rutgers.edu]

If you seek *religious accommodations*, the Office of the Dean of Students is available to verify absences for religious observance, as needed.

[Rutgers University-New Brunswick Dean of Students phone (848)932-2300 or email deanofstudents@echo.rutgers.edu]

[Rutgers University-Newark Dean of Students phone (973)353-5063 or email DeanofStudents@newark.rutgers.edu]

If you have experienced any form of *gender or sex-based discrimination or harassment*, including sexual assault, sexual harassment, relationship violence, or stalking, the Office for Violence Prevention and Victim Assistance provides help and support. More information can be found at <http://vpva.rutgers.edu/>.

[Rutgers University-New Brunswick incident report link: <http://studentconduct.rutgers.edu/concern/>. You may contact the Office for Violence Prevention and Victim Assistance at (848)932-1181]

[Rutgers University-Newark incident report link: https://cm.maxient.com/reportingform.php?RutgersUniv&layout_id=7 . You may also contact the Office of Title IX and ADA Compliance at (973)353-1906 or email at TitleIX@newark.rutgers.edu. If you wish to speak with a staff member who is confidential and does **not** have a reporting responsibility, you may contact the Office for Violence Prevention and Victim Assistance at (973)353-1918 or email run.vpva@rutgers.edu]

If students who have experienced a temporary condition or injury that is adversely affecting their ability to fully participate, you should submit a request via <https://temporaryconditions.rutgers.edu> .

If you are a military *veteran* or are on active military duty, you can obtain support through the Office of Veteran and Military Programs and Services. <http://veterans.rutgers.edu/>

If you are in need of *mental health* services, please use our readily available services.

[Rutgers University-Newark Counseling Center: <http://counseling.newark.rutgers.edu/>]

[Rutgers Counseling and Psychological Services–New Brunswick: <http://rhscaps.rutgers.edu/>]

If you are in need of *physical health* services, please use our readily available services.

[Rutgers Health Services – Newark: <http://health.newark.rutgers.edu/>]

[Rutgers Health Services – New Brunswick: <http://health.rutgers.edu/>]

If you are in need of *legal* services, please use our readily available services: <http://rusls.rutgers.edu/>

Students experiencing difficulty in courses due to *English as a second language (ESL)* should contact the Program in American Language Studies for supports.

[Rutgers–Newark: PALS@newark.rutgers.edu]

[Rutgers–New Brunswick: eslpals@english.rutgers.edu]

If you are in need of additional *academic assistance*, please use our readily available services.

[Rutgers University-Newark Learning Center: <http://www.ncas.rutgers.edu/rlc>]

[Rutgers University-Newark Writing Center: <http://www.ncas.rutgers.edu/writingcenter>]

[Rutgers University-New Brunswick Learning Center: <https://rlc.rutgers.edu/>]

[Optional items that many faculty include:

- Students must sign, date, and return a statement declaring that they understand the RU Academic Integrity Policy.

- Students must sign, date, and return a statement declaring that they understand this syllabus.]

The Syllabus is subject to modification by the professor.