

(1) Advantage Point, Inc. (API)

Project Description: Window of Opportunity: According to the Third International Mathematics and Science Study, American high school students finished near the bottom in a worldwide math assessment. In reading, the reports are equally disturbing with an estimated 80% of all students leaving high school unable to read at their grade level. The best estimates are that 40% of all US students are not performing at grade level in reading and/or math. Public schools face an ever-increasing shortage of funding, facilities, and personnel. In fact, for at least the next seven years our school-age population will continue to expand, placing unprecedented demands on an already stressed educational system. Because of this, students who fall behind or need individualized attention to reach their full potential will find it increasingly difficult to receive the extra help they deserve in the traditional school setting. The cost for private tutoring from traditional sources has placed it out of reach of many students, costing from \$40-60 per hour. KEY: Corporate Sponsors and Foundations are looking for a reason to say "Yes," but want verifiable results. During the first three years of operations The **A Thousand Points of Knowledge System™** has verifiable results of an average 1.4 grade level increase after 40 hours of instruction.

Business Description: Provides affordable, individualized academic skills diagnostic testing and instruction through strategic relationships with not-for-profit organizations. API partners with non-profit organizations rather than building and/or leasing free standing retail locations. API provides all of the testing and curriculum materials necessary to operate a successful Learning Center, complete training for a non-profit staff member who is or has been a certified teacher to complete the director's training program, and Learning Center Stations for student instruction. Non-profit provides Learning Center space, Center director, and necessary instructors. Recommended instructional rates of \$25/hour are 50-60% below the going private rate.

API Business Objectives: Open ten (10) centers by June 11, 2001 to take advantage of increased enrollment for summer programs. Within 1 year, operate twenty (20) Tier 1 Centers (heavily populated areas) opened and within three (3) years an additional ten (10) Tier 2 Centers (small communities) and ten (10) Tier 3 Centers (on the edges of API territory).

Target Non-Profit Partners: YMCA's (already successfully targeted in several cities), private/public schools, park and recreation districts, churches, community centers, children's hospitals, and other groups with Missions that include children and/or education.

Parameters for Target Partner: Location, demographics, support (Board Members, Donors, Management), and community recognition/reputation.

Deliverable: Marketing Plan

(2) Cape Blanco Cranberries

Project Description: Cape Blanco Cranberries was established in 1989 in Port Orchard, OR and planted its first twelve acres in 1992. Subsequent plantings raised the total to over forty-five acres of bogs. This relative short history affects the firm in that it limits the percentage of processed fruit comparable to an established competitor.

Cape Blanco's excellent micro-climate and bog and water system construction create competitive advantages. Other proprietary factors will be developed during the course of the project. Cape Blanco's owners are in an unusual position. They are not part of the Ocean Spray cooperative that controls over 80% of the cranberry production in the US. Cape Blanco's absence from the co-op makes it difficult for them to sell their product. On the other hand, the smaller Ocean Spray growers have little power relative to the large growers who dominate the policies of Ocean Spray.

One significant advantage that Cape Blanco has is the quality of the fruit that they produce, another is the fact that they can grow and harvest cranberries year round. These characteristics give Cape Blanco the flexibility to create value-added products that can circumvent the commodity status usually given to cranberries. There are a myriad of options open to them. The MBA team will have to identify the options, evaluate the risks and benefits of each and create a compelling, creative marketing plan to ensure success. You will be working directly with the owners who are very motivated to find a viable alternative.

Deliverables: Marketing Plan

(3) Centro Cultural – Adelante Mujeres

Project Description: Feasibility Study and Business Plan for non-profit folk art project. Two years ago, a group of immigrant women from Latin America began meeting to create traditional folk art. Calling themselves Adelante Mujeres, they formed a non-profit organization in Cornelius with the support of Centro Cultural, which worked with them to secure a place to gather, give direction to the project, acquire the necessary materials and begin marketing. Adelante Mujeres, which means Forward, Women can also be translated as "take heart, women". Members of Adelante Mujeres want to determine whether or not this project can be turned into a successful business venture.

Deliverables: Business Plan and Feasibility Study

The Feasibility Study will determine the marketability of traditional Latin American arts and crafts; it will analyze the potential market for high-end, originally designed products as well as medium-end products. Possible market venues will be investigated, such as: arts and crafts consignment shops, museum stores and galleries, craft fairs and bazaars, on-line marketing, and a project owned store. Adelante Mujeres products are currently sold at Beyond Borders, a fairly traded arts and crafts store in Multnomah Village. The study would look at potential sales at this store as well. Points to consider:

- Given that imported crafts from Latin America may be sold at a price lower than local crafters can afford to offer, it will be necessary to find markets that can support a living wage for the artisans.

- Some buyers will be motivated to purchase Adelante Mujeres products partially because they know that the proceeds go directly to low-income immigrant women who are struggling to support their families. Target market analysis to establish a profile of buyers that fit this category as well as a marketing plan to reach these buyers will be required.
- The study will consider trends in international folk art. What are people buying? Is there significant interest in Mexican Art, in Latin American Art in general? Are people interested in immigrant made products? Is the market flooded with non-profit sales all trying to compete for the same “conscientious consumers”?

The Business Plan will consider the following:

- Centro Cultural will be conducting interviews with potential artisans to assess their interests, talents and needs. This information will be included in the study and business plan. Centro will be seeking federal funding to launch the business. We anticipate \$250,000 from federal sources and \$50,000 from private foundations and donors. How should these monies be best spent in the first year of the business? Options include: building a production center on Centro Cultural property in Cornelius; rent a production space; creating a trainee program for potential artisans; establish a market for several items and hire artisans to fill production quotas.
- There are also questions of artisan participation in the varied aspects of the business. Many of the artisans do not speak English and some were unable to finish grade school due to financial hardships. These realities create obstacles to ownership. Adelante Mujeres may create a specific educational component that helps members acquire the basic skills necessary to become entrepreneurs, or Adelante Mujeres could hire someone to manage the business, or it could become an artisan owned cooperative with non-profit support.

(4) Columbia Community Mental Health (Finance)

Project Description: Columbia Community Mental Health would like to consolidate its outpatient services from three (3) locations in St. Helens to one (1) location next to three of its major customers: Columbia County Correctional Facility, Northwest Region Education Service District, and Riverside Training Center. They are studying the feasibility of this project. The City of St. Helens strongly supports the consolidation of services and move to the Bergsoe Office Building. Furthermore, the city has been encouraging the redevelopment of this property to return it to productive use. The reduction in rent and building fees from the consolidation is expected to result in the ability to hire additional staff.

Deliverables: To assist the Columbia Community Mental Health Board of Directors in ascertaining the following:

- Whether to proceed with the consolidation.
- How to proceed with the consolidation.
- Whether to invest earnest money in the specified property.

(5) The Dark Group, Inc. (Technology)

Project Description: Founded in 1995, THE DARK REPORT is a business intelligence service serving the clinical laboratory, pathology, and in vitro diagnostics industry. Published every three weeks, it is sent via first class mail to subscribing member clients. All research, editorial, production, fulfillment, invoicing, collections, and customer support services are performed from an office. Every May, THE DARK REPORT produces the Executive War College on Lab and Pathology Management. This three-day event attracts more than 400 senior laboratory executives and pathologists. Attendees come primarily from the United States, but a growing number of attendees are from overseas countries such as Brazil, New Zealand, Australia, Germany, and Belgium.

THE DARK REPORT is marketed as a membership service with weekly dues that are invoiced either every 26 weeks (semi-annually) or 52 weeks (annually). Currently, we use a system that incorporates several software products and is proving cumbersome and inaccurate:

- ACT!4.0 is utilized to maintain the subscriber mailing list and generate the mailing labels used for each issue.
- Microsoft EXCEL is used as a “master subscription file.” It is the way we add new members, delete cancelled or terminated memberships, and identify those memberships that are to be invoiced in the next monthly billing cycle.
- Microsoft Word is used to generate the actual invoices, importing data from ACT!4.0 and EXCEL.
- Quickbooks is the financial management software that captures invoices for Accounts Receivable, tracks payments, and generates aging reports for collections.

This process is time-consuming and leads to unacceptable errors in omitted invoicing and duplicate invoicing. Most importantly, it is difficult to audit to insure accuracy.

Deliverables: A study team with a background in accounting, auditing, and financial controls will evaluate our needs and develop the following:

- A relational database, possibly using Microsoft Access, which can act as a master customer file and generate invoices, track collections, produce mailing labels for each issue of the publication, and track sales of ancillary products, including *War College* registrations. This relational database should be able to export its financial and customer information into Quickbooks.
- Design a workflow process for accepting a new membership subscription, entering it into our system, generating regular invoices, and handling customer service requests. This workflow process should be a system of prevention that eliminates errors by its design. This process should accommodate audit procedures to insure accurate invoicing, collections, terminations/cancellations and similar work steps.

The numbers involved are not large, but the desire for flawless customer service and operation implementation is great. For member subscribers, we generate less than 100 invoices per month. During the *War College* cycle, we generate less than 500 invoices. Our master database of customers, inquiries, and prospects does not exceed 2,500 names.

(6) G. I. Joe's

Project Description: G. I. Joe's is a privately held, Northwest sports and auto retailer with seventeen stores and 1350 employees. An additional location is scheduled to open June 2001. The Company's 18th store is an active and growing, direct marketing outsourced website channel. G. I. Joe's recently completed an extensive and successful analysis and revision of its purchasing, inventory management, warehousing and logistics systems and now plans to enhance its Human Resource Management.

G. I. Joe's employee turnover, which exceeds acceptable limits, affects every aspect of labor efficiency and productivity. Education and training are critical to delivering a quality consumer experience. With a slowing economy and the competitive retail environment, G.I. Joe's plans improve its Human Resources through an extensive internal review and assessment.

Based on recent customer surveys, our employees are a major source of information and help to our shoppers. We pride ourselves in educating customers as part of the selling process. Customers see the quality of this process as a major part of our competitive edge in the marketplace. We want to elevate that advantage.

Deliverables to include (but not be limited to):

- Informational meetings with senior management to review markets, products, stores and services. These meetings will discuss and set project scope, deliverables, timelines and expected outcomes.
- Team review of current HR practices and procedures and comparison of these to "best practices" of other leading retail firms.
- Team analysis of current turnover rates including selective interviews with employees and operations managers.
- Review of current compensation scheme, recruiting, hiring, training and retention for first-line employees.
- Recommendation of new policies and procedures aimed at improving all facets of the current HR process.
- Processes to develop people into future managers.
- Measurement tools for personal productivity and improvement.
- Determination of the financial and personnel impacts of these proposed changes.
- A written report and debriefing session with senior Joe's management concerning the team's findings and recommendations.

(7) OHSU -- Chemical Risk Information Service (Finance)

Project Description: Strategic Plan. The Chemical Risk Information Service is essentially a small business owned by Oregon Health Sciences University (OHSU), a public corporation. The program is "not for profit"; the intention being to cover all costs of the program from the fees generated by the program. The Chemical Risk Information Service is part of the Center for Research on Occupational and Environmental Toxicology (CROET), which is one of the divisions of OHSU. We provide cost-effective assistance to a wide variety of businesses and

government agencies, primarily in the state of Oregon, to help them comply with federal and state Occupation Safety and Health Administration (OSHA) regulations. We provide this service by scanning and electronically storing Material Safety Data Sheets (MSDS's). These MSDS's are then indexed into a database. The actual image files are listed in the database as a hyperlink so that they can be accessed via this database. We then make these MSDS,s available, when requested by employees or customers, via fax, Email, over the internet or via the employer's intranet site.

Deliverables:

Primary: Strategic Plan

Secondary:

- Development of marketing strategies
- Review of written marketing materials
- Review of the Web site marketing pages
- Creation of a financial plan to increase revenue generation

(8) The Players Foundation (Finance)

Project Description: The Mission of The Players Foundation, a non-profit 501(c)(3) company, is to provide athletic opportunities for today's abused and/or underprivileged youth. Adult survivors of those environments founded this organization in June 2000. The Players Foundation offers participants positive learning environments and team experiences through athletics that will help broaden their social skills. By giving these children a chance to grow and develop life-long learning skills through athletic activities, we as a society benefit from healthy, active, secure and well-mannered youth as they progress into young adults. Sports is a highly complex set of institutions populated by both genders with diverse racial and ethnic backgrounds, cultural values, physical abilities, social class, religious preference, and sexual orientation. Studies show that regular physical activity can reduce the risk of life threatening disease like heart attacks, hypertension, colon cancer, and diabetes; it helps reduce symptoms of depression and anxiety, helps control weight and is beneficial in maintaining healthy bones, muscles, and joints. These dynamics combined with the other benefits derived from participation demonstrates the important need for sports, especially for developing youth, to achieve valuable life long learning skills.

The Players Foundation would like to build and operate its own athletic facility called The Players Club at which Youth Experience programs will be offered. These programs give at-risk youth an opportunity to experience athletic activities and events at no cost.

Deliverables: Develop a capital campaign to raise the necessary money for this facility and develop financial statements and projections for 5 years.

(9) Startronics Solar Lighting (Technology)

Project Description: Startronics Solar Lighting manufactures a unique family of compact self-contained powered lighting products valued throughout the world. By using the latest advances in extremely efficient LED (light emitting diode) technology, their products provide reliable and inexpensive light. Currently Startronics manufactures lighting systems for transit centers, small signs, security / emergency backup, recreational vehicles, boats, as well as many other specialty applications. Given a limited budget, Startronics is interested in creating a marketing plan that provides maximum value. Finally, with so many lighting opportunities available, the company must mitigate a loss of focus in its growth phase.

Deliverables: A marketing plan to include:

- Target market study
- Focused market strategy to maximize available budget
- Suggested changes to achieve a professional appearance for catalog, Web site, specification sheets, packaging, etc.
- Staff hiring recommendations
- Identify key industry publications for advertising
- Identify and suggest product cosmetic changes
- Budget analysis for marketing plan implementation