

**U.S. Department of Education**  
**Washington, D.C. 20202-5335**



**APPLICATION FOR GRANTS**  
**UNDER THE**

**Centers for International Business Education**

**CFDA # 84.220A**

**PR/Award # P220A140021**

**Grants.gov Tracking#: GRANT11694041**

OMB No. , Expiration Date:

Closing Date: Jul 03, 2014

## **\*\*Table of Contents\*\***

<b>Form</b>	<b>Page</b>
<b>1. Application for Federal Assistance SF-424</b>	e3
<b>Attachment - 1 (1240-U.S.; Southeast U.S., South Carolina; Midlands of South Carolina; City of Columbia, South Carolina; and Counties of Richland and Lexington, South Carolina)</b>	e6
<b>2. Assurances Non-Construction Programs (SF 424B)</b>	e7
<b>3. Disclosure Of Lobbying Activities (SF-LLL)</b>	e9
<b>4. ED GEPA427 Form</b>	e10
<b>Attachment - 1 (1236-EEO)</b>	e11
<b>5. Grants.gov Lobbying Form</b>	e12
<b>6. ED Abstract Narrative Form</b>	e13
<b>Attachment - 1 (1235-South Carolina CIBE Abstract)</b>	e14
<b>7. Project Narrative Form</b>	e15
<b>Attachment - 1 (1239-South Carolina CIBE Narrative with TOC)</b>	e16
<b>8. Other Narrative Form</b>	e73
<b>Attachment - 1 (1237-South Carolina CIBE Other Narrative Attachment Forms (Sections 1-8))</b>	e74
<b>Attachment - 2 (1238-South Carolina CIBE Supplemental Narrative Attachment)</b>	e184
<b>9. Budget Narrative Form</b>	e275
<b>Attachment - 1 (1234-South Carolina CIBE Budget Narrative)</b>	e276
<b>10. Form ED_524_Budget_1_2-V1.2.pdf</b>	e296
<b>11. Form ED_SF424_Supplement_1_2-V1.2.pdf</b>	e298

This application was generated using the PDF functionality. The PDF functionality automatically numbers the pages in this application. Some pages/sections of this application may contain 2 sets of page numbers, one set created by the applicant and the other set created by e-Application's PDF functionality. Page numbers created by the e-Application PDF functionality will be preceded by the letter e (for example, e1, e2, e3, etc.).

Application for Federal Assistance SF-424		
* 1. Type of Submission: <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application	* 2. Type of Application: <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation <input type="checkbox"/> Revision	* If Revision, select appropriate letter(s): <input type="text"/> * Other (Specify): <input type="text"/>
* 3. Date Received: <input type="text" value="07/02/2014"/>	4. Applicant Identifier: <input type="text"/>	
5a. Federal Entity Identifier: <input type="text"/>	5b. Federal Award Identifier: <input type="text"/>	
<b>State Use Only:</b>		
6. Date Received by State: <input type="text"/>	7. State Application Identifier: <input type="text"/>	
<b>8. APPLICANT INFORMATION:</b>		
* a. Legal Name: <input type="text" value="University of South Carolina"/>		
* b. Employer/Taxpayer Identification Number (EIN/TIN): <input type="text" value="57-6001153"/>	* c. Organizational DUNS: <input type="text" value="0413878460000"/>	
<b>d. Address:</b>		
* Street1:	<input type="text" value="Sponsored Awards Management"/>	
Street2:	<input type="text" value="1600 Hampton Street, Suite 414"/>	
* City:	<input type="text" value="Columbia"/>	
County/Parish:	<input type="text" value="Richland"/>	
* State:	<input type="text" value="SC: South Carolina"/>	
Province:	<input type="text"/>	
* Country:	<input type="text" value="USA: UNITED STATES"/>	
* Zip / Postal Code:	<input type="text" value="29208-0001"/>	
<b>e. Organizational Unit:</b>		
Department Name: <input type="text" value="CIBER"/>	Division Name: <input type="text" value="Darla Moore School of Business"/>	
<b>f. Name and contact information of person to be contacted on matters involving this application:</b>		
Prefix: <input type="text" value="Dr."/>	* First Name: <input type="text" value="Kendall"/>	
Middle Name: <input type="text"/>		
* Last Name: <input type="text" value="Roth"/>		
Suffix: <input type="text"/>		
Title: <input type="text" value="Sr. Associate Dean of International Programs"/>		
Organizational Affiliation: <input type="text" value="Darla Moore School of Business"/>		
* Telephone Number: <input type="text" value="803.777.3604"/>	Fax Number: <input type="text"/>	
* Email: <input type="text" value="kroth@moore.sc.edu"/>		

**Application for Federal Assistance SF-424**

**\* 9. Type of Applicant 1: Select Applicant Type:**

H: Public/State Controlled Institution of Higher Education

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

\* Other (specify):

**\* 10. Name of Federal Agency:**

U.S. Department of Education

**11. Catalog of Federal Domestic Assistance Number:**

84.220

CFDA Title:

Centers for International Business Education

**\* 12. Funding Opportunity Number:**

ED-GRANTS-060314-001

\* Title:

Office of Postsecondary Education (OPE): Center for International Business Education Program CFDA Number 84.220A

**13. Competition Identification Number:**

84-220A2014-1

Title:

**14. Areas Affected by Project (Cities, Counties, States, etc.):**

U.S.; Southeast U.S., South Carolina; Midla

Add Attachment

Delete Attachment

View Attachment

**\* 15. Descriptive Title of Applicant's Project:**

Center for International Business Education (CIBE)

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

**Application for Federal Assistance SF-424**

**16. Congressional Districts Of:**

\* a. Applicant

\* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

Add Attachment

Delete Attachment

View Attachment

**17. Proposed Project:**

\* a. Start Date:

\* b. End Date:

**18. Estimated Funding (\$):**

* a. Federal	<input type="text" value="1,458,486.00"/>
* b. Applicant	<input type="text" value="1,458,486.00"/>
* c. State	<input type="text" value="0.00"/>
* d. Local	<input type="text" value="0.00"/>
* e. Other	<input type="text" value="0.00"/>
* f. Program Income	<input type="text" value="0.00"/>
* g. TOTAL	<input type="text" value="2,916,972.00"/>

**\* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

- a. This application was made available to the State under the Executive Order 12372 Process for review on
- b. Program is subject to E.O. 12372 but has not been selected by the State for review.
- c. Program is not covered by E.O. 12372.

**\* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**

Yes  No

If "Yes", provide explanation and attach

Add Attachment

Delete Attachment

View Attachment

**21. \*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

\*\* I AGREE

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

**Authorized Representative:**

Prefix:  \* First Name:   
Middle Name:   
\* Last Name:   
Suffix:

\* Title:

\* Telephone Number:  Fax Number:

\* Email:

\* Signature of Authorized Representative:  \* Date Signed:

The United States as a whole, the Southeast United States, the state South Carolina, the Midlands of South Carolina, the city of Columbia, and the counties of Richland and Lexington.

## ASSURANCES - NON-CONSTRUCTION PROGRAMS

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington, DC 20503.

**PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.**

**NOTE:** Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States and, if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee- 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and, (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.
7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply, as applicable, with provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327-333), regarding labor standards for federally-assisted construction subagreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93-205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq.).
14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §§2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.
19. Will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act (TVPA) of 2000, as amended (22 U.S.C. 7104) which prohibits grant award recipients or a sub-recipient from (1) Engaging in severe forms of trafficking in persons during the period of time that the award is in effect (2) Procuring a commercial sex act during the period of time that the award is in effect or (3) Using forced labor in the performance of the award or subawards under the award.

<p>SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL</p> <p>Debra Wingard</p>	<p>TITLE</p> <p>Senior Sponsored Program Administrator</p>
<p>APPLICANT ORGANIZATION</p> <p>University of South Carolina</p>	<p>DATE SUBMITTED</p> <p>07/02/2014</p>

Standard Form 424B (Rev. 7-97) Back

# DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C.1352

Approved by OMB  
0348-0046

<b>1. * Type of Federal Action:</b> <input type="checkbox"/> a. contract <input checked="" type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	<b>2. * Status of Federal Action:</b> <input type="checkbox"/> a. bid/offer/application <input checked="" type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	<b>3. * Report Type:</b> <input checked="" type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change
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**4. Name and Address of Reporting Entity:**

Prime     SubAwardee

\* Name:

\* Street 1:     Street 2:

\* City:     State:     Zip:

Congressional District, if known:

**5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:**

<b>6. * Federal Department/Agency:</b> <input type="text" value="US DoEd"/>	<b>7. * Federal Program Name/Description:</b> <input type="text" value="Centers for International Business Education"/>
	CFDA Number, if applicable: <input type="text" value="84.220"/>

<b>8. Federal Action Number, if known:</b> <input type="text"/>	<b>9. Award Amount, if known:</b> \$ <input type="text"/>
--	--

**10. a. Name and Address of Lobbying Registrant:**

Prefix  \* First Name  Middle Name

\* Last Name  Suffix

\* Street 1:     Street 2:

\* City:     State:     Zip:

**b. Individual Performing Services** (including address if different from No. 10a)

Prefix  \* First Name  Middle Name

\* Last Name  Suffix

\* Street 1:     Street 2:

\* City:     State:     Zip:

**11.** Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

\* Signature:

\* Name: Prefix  \* First Name  Middle Name

\* Last Name  Suffix

Title:     Telephone No.:     Date:

<b>Federal Use Only:</b>	Authorized for Local Reproduction Standard Form - LLL (Rev. 7-97)
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PR/Award # P220A140021

## NOTICE TO ALL APPLICANTS

The purpose of this enclosure is to inform you about a new provision in the Department of Education's General Education Provisions Act (GEPA) that applies to applicants for new grant awards under Department programs. This provision is Section 427 of GEPA, enacted as part of the Improving America's Schools Act of 1994 (Public Law (P.L.) 103-382).

### To Whom Does This Provision Apply?

Section 427 of GEPA affects applicants for new grant awards under this program. **ALL APPLICANTS FOR NEW AWARDS MUST INCLUDE INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS NEW PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.**

(If this program is a State-formula grant program, a State needs to provide this description only for projects or activities that it carries out with funds reserved for State-level uses. In addition, local school districts or other eligible applicants that apply to the State for funding need to provide this description in their applications to the State for funding. The State would be responsible for ensuring that the school district or other local entity has submitted a sufficient section 427 statement as described below.)

### What Does This Provision Require?

Section 427 requires each applicant for funds (other than an individual person) to include in its application a description of the steps the applicant proposes to take to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries with special needs. This provision allows applicants discretion in developing the required description. The statute highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age. Based on local circumstances, you should determine whether these or other barriers may prevent your students, teachers, etc. from such access or participation in, the Federally-funded project or activity. The description in your application of steps to be taken to overcome these barriers need not be lengthy; you may provide a clear and succinct

description of how you plan to address those barriers that are applicable to your circumstances. In addition, the information may be provided in a single narrative, or, if appropriate, may be discussed in connection with related topics in the application.

Section 427 is not intended to duplicate the requirements of civil rights statutes, but rather to ensure that, in designing their projects, applicants for Federal funds address equity concerns that may affect the ability of certain potential beneficiaries to fully participate in the project and to achieve to high standards. Consistent with program requirements and its approved application, an applicant may use the Federal funds awarded to it to eliminate barriers it identifies.

### What are Examples of How an Applicant Might Satisfy the Requirement of This Provision?

The following examples may help illustrate how an applicant may comply with Section 427.

(1) An applicant that proposes to carry out an adult literacy project serving, among others, adults with limited English proficiency, might describe in its application how it intends to distribute a brochure about the proposed project to such potential participants in their native language.

(2) An applicant that proposes to develop instructional materials for classroom use might describe how it will make the materials available on audio tape or in braille for students who are blind.

(3) An applicant that proposes to carry out a model science program for secondary students and is concerned that girls may be less likely than boys to enroll in the course, might indicate how it intends to conduct "outreach" efforts to girls, to encourage their enrollment.

We recognize that many applicants may already be implementing effective steps to ensure equity of access and participation in their grant programs, and we appreciate your cooperation in responding to the requirements of this provision.

### Estimated Burden Statement for GEPA Requirements

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection is required to obtain or retain benefit (Public Law 103-382). Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20210-4537 or email [ICDocketMgr@ed.gov](mailto:ICDocketMgr@ed.gov) and reference the OMB Control Number 1894-0005.

**Optional - You may attach 1 file to this page.**

EEO.pdf

Add Attachment

Delete Attachment

View Attachment

The University of South Carolina is an Equal Opportunity employer and the Office of Equal Opportunity Programs was created the University of South Carolina to administer the University's affirmative action program and to ensure that applicants for employment, employees, perspective and enrolled students and all program participants at the University of South Carolina are provided equal opportunity and access. The University of South Carolina and the University of South Carolina CIBE has and will continue to ensure equal access to all programs, services and activities and to ensure all persons are protected against illegal discrimination on the basis of race, color, religion, sex/gender, national origin, age, disability, sexual orientation and veteran status. The University of South Carolina, the Darla Moore School of Business and the University of South Carolina CIBE have taken strategic measures and steps as part of its strategic plan to ensure that barriers are eliminated and tall person are provided equitable access and allowed to participate in any educational program provided the University without respect to race, color, religion, sex/gender, national origin, age, disability, sexual orientation and veteran status.

The University of South Carolina as an equal opportunity/affirmative action employer is committed to the hiring of faculty and staff and selection of graduate and undergraduate students and other program participants in its programs – both academic and outreach – without regard to race, color, religion, sex/gender, national origin, age, disability, sexual orientation and veteran status. The University of South Carolina, through its Office of Disability Services, provides adaptive services for persons with disabilities and provides audio books, note takers, audio records, book scanning, adaptive software/hardware and other technology services. The University of South Carolina also provides, through the Office of Disability Services, interpreter services for students and program participants for non-academic programs and events upon request.

The University of South Carolina is continually updating its policies, practices and procedures to ensure full access, equitable treatment and full participation in all activities, programs and services provided to all individuals seeking services through the University of South Carolina's educational programs, in full compliance with applicable federal and state laws. The President of the University of South Carolina has appointed an Executive Assistant to the President for Equal Opportunity Programs who is responsible for planning, developing, administering and evaluating the University's equal opportunity/affirmative action policies and practices to ensure full compliance with both federal and state statutes relating to non-discrimination in employment and education, educational programs and services, and equitable access at the University of South Carolina.

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## CERTIFICATION REGARDING LOBBYING

### Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

### Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

<b>* APPLICANT'S ORGANIZATION</b> <input style="width: 90%;" type="text" value="University of South Carolina"/>	
<b>* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE</b>	
Prefix: <input style="width: 100px;" type="text"/>	* First Name: <input style="width: 200px;" type="text" value="Debra"/> Middle Name: <input style="width: 150px;" type="text"/>
* Last Name: <input style="width: 300px;" type="text" value="Wingard"/>	Suffix: <input style="width: 80px;" type="text"/>
* Title: <input style="width: 250px;" type="text" value="Senior Sponsored Program Administrator"/>	
* SIGNATURE: <input style="width: 300px;" type="text" value="Debra Wingard"/>	* DATE: <input style="width: 150px;" type="text" value="07/02/2014"/>

## Abstract

The abstract narrative must not exceed one page and should use language that will be understood by a range of audiences. For all projects, include the project title (if applicable), goals, expected outcomes and contributions for research, policy, practice, etc. Include population to be served, as appropriate. For research applications, also include the following:

- Theoretical and conceptual background of the study (i.e., prior research that this investigation builds upon and that provides a compelling rationale for this study)
- Research issues, hypotheses and questions being addressed
- Study design including a brief description of the sample including sample size, methods, principals dependent, independent, and control variables, and the approach to data analysis.

[Note: For a non-electronic submission, include the name and address of your organization and the name, phone number and e-mail address of the contact person for this project.]

---

## You may now Close the Form

**You have attached 1 file to this page, no more files may be added. To add a different file, you must first delete the existing file.**

\* Attachment:

## **Center for International Business Education (CIBE) Proposal Abstract University of South Carolina**

The Darla Moore School of Business (DMSB) at the University of South Carolina (USC), a long-time leader in international business education, is requesting funding for a Center for International Business Education (CIBE) for the grant period October 1, 2014 to September 30, 2018. This funding, matched by USC, will be used to accomplish 39 major activities comprised of 63 distinct projects and programs, many of which directly address and support the application's two Competitive Preference Priorities and two Invitational Priorities. These activities, which fully meet the mandated requirements for CIBE institutions, as well as encompassing many of the other articulated permissible activities of the legislation, are grouped in five basic categories: (1) development of academic programmatic activities; (2) outreach to business and government; (3) outreach to academic institutions, especially those previously underrepresented; (4) research in international business education; and (5) project evaluation.

Within this proposal, there are also four major new principal initiatives among the five broad CIBE categories of activities, all designed to achieve maximum benefit to all participants and stakeholders of CIBE programming: (1) Undergraduate Cohort Programs: Language and Multi-Country Collaboration; (2) Comparative Institutional Analysis of Regional/South Carolina Cluster Development; (3) Expanding the International Research Focus: Comparative Institutionalism; and (4) The Africa Initiative. The Cohort Programs initiative will enhance the quality of the education for our students and will equip them with the credentials of having studied at a highly regarded academic institution in other countries, as well as at the #1 ranked undergraduate international business school in the nation (*U.S. News & World Report*). The Cluster Development Initiative will directly promote, through collaboration with businesses as well as policy-focused organizations at home and abroad, cross-border business development to advance trade, investment and innovation in important sectors for our domestic economy. The International Business Research Focus is centered on three comprehensive research themes, deemed critical by DMSB for pushing the frontier of international business. The Africa Initiative, rooted in the emerging policy priority of U.S. relationships with Africa, incorporates a combination of several programmatic and research activities, to include an annual Faculty Development in International Business (FDIB) Sub-Saharan Program, an FDIB Middle East and North Africa Program, the Arabic Language Track in the International MBA (IMBA) program, and requested and matching funds for research into the African economy and U.S. competitiveness in Africa.

In addition to these initiatives, the DMSB CIBE will continue to provide outstanding overall outreach activities, among them its Export-Market Entry Studies initiative (Competitive Preference Priority 1) and its Minority-Serving Institutions Internationalization initiative (Competitive Preference Priority 2). The DMSB CIBE will also engage in 13 separate activities involving language instruction and language performance testing (Invitational Priority 1) and multiple activities designed to collaborate and partner with institutions in Sub-Saharan Africa, South Asia and/or Southeast Asia (Invitational Priority 2). Because of the developed expertise and existing program base of DMSB, well over 85% of the resources requested will be spent directly on outreach and research activities each year. All activities will be evaluated externally and internally over the course of the grant period to measure their impact and outcomes.

## Project Narrative File(s)

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## Table of Contents

<b>Part 1. Meeting the Purposes of the Authorizing Statute.....</b>	<b>1</b>
1.1. Meeting the Purposes of the Authorizing Statute: Introduction.....	1
1.2. Meeting the Purposes of the Authorizing Statute: Organization of the Proposal.....	3
1.3. Meeting the Purposes of the Authorizing Statute: Professional Graduate Programs.....	4
1.3.1. Master of International Business (MIB).....	4
Graduate 1. Master of International Business (MIB).....	4
1.3.2. International MBA (IMBA) Program .....	6
Graduate 2. International MBA Program.....	6
Graduate 3. Russian Language Track.....	6
Graduate 4. Dual Degree Program (EGADE).....	7
Graduate 5. Cultural-Institutional Course Module.....	7
Graduate 6. Language Assessment Procedures.....	9
Graduate 7. Text Analytics Training.....	9
1.3.3. One Year MBA.....	9
Graduate 8. Dual Degree Program (New South Wales).....	10
1.3.4. Professional MBA (PMBA) Program.....	10
Graduate 9. International Business Certificate.....	10
1.4. Meeting the Purposes of the Authorizing Statute: Doctoral Programs.....	11
PhD 1. Dual Degree Programs in International Business.....	11
1.5. Meeting the Purposes of the Authorizing Statute: Undergraduate Programs.....	11
1.5.1. Undergraduate Cohort Programs: Chinese.....	11
Undergraduate 1. International Business and Chinese Enterprise (IBCE).....	12
1.5.2. Undergraduate Cohort Programs: Language and Multi-Country Collaborations.....	13
Undergraduate 2. Arabic, Portuguese, French, German and Spanish Language Cohorts..	13
Undergraduate 3. Multi-Country Thematic-Based Collaborative Cohort Programs.....	13
1.5.3. International Business Major.....	14
Undergraduate 4. Assessment Procedures.....	14
Undergraduate 5. International Business Career Day.....	14
1.5.4. Functional Major Programs.....	15
Undergraduate 6. Functional Department Corporate Boards.....	15
Undergraduate 7. Overseas Short-Term Study Abroad (STSA) Programs.....	16
1.6. Meeting the Purposes of the Authorizing Statute: Outreach to Business/Government.....	16
Business 1. Comparative Institutional Analysis of Regional/SC Clusters and Environmental Development.....	17
Business 2. Export Market Entry Studies Initiative.....	17
Business 3. International Business Open and Firm-Specific Executive Programs.....	18

1.7. Meeting the Purpose of the Authorizing Statute: National/Regional Outreach.....	18
Outreach 1. MSI Internationalization Initiative.....	19
Outreach 2. Annual International Business Research Conference.....	21
Outreach 3. Cultural and Finance Conference.....	21
Outreach 4. Faculty Development in International Business Program.....	21
Outreach 5. Faculty Development in International Business Program - New Courses....	22
Outreach 6. FDIB Sub-Saharan Africa Program.....	23
Outreach 7. FDIB Middle East and North Africa (MENA) Program.....	23
Outreach 8. FDIB China/Hong Kong Program.....	24
Outreach 9. Workshop on Teaching Spanish for International Business for Professors of Spanish.....	24
Outreach 10. USC Summer Language Institute (SLI).....	25
Outreach 11. CIBE Business Language Consortium.....	26
Outreach 12. CUIBE and GBSN Membership and Support.....	26
Outreach 13. International Magnet Middle/High Schools Collaboration.....	26
1.8. Competitive Preference and Invitational Priorities.....	27
<b>Part 2. Significance of the Activities: Principal Initiatives.....</b>	<b>28</b>
2.1. Significance: Undergraduate Cohort Language Programs and Multi-Country Collaborations....	28
2.2. Significance: Comparative Institutional Analysis of Regional/SC Cluster and Economic Development.....	31
2.3. Significance: Expanding the International Research Focus: Comparative Institutionalism.....	35
2.4. Significance: The Africa Initiative.....	37
<b>Part 3. Quality of Project Design.....</b>	<b>38</b>
3.1. Research Theme 1: Comparative Corporate Governance, Institutions and Global Strategy.....	40
3.2. Research Theme 2: Industry Clusters, Innovation and Global Competitiveness.....	42
3.3. Research Theme 3: Managing Global Political Risk and Legitimacy of MNCs-Africa Focus....	45
3.4. Competitive International Business Research Program.....	47
<b>Part 4. The Management Plan.....</b>	<b>48</b>
<b>Part 5. Quality of Project Personnel.....</b>	<b>49</b>
<b>Part 6. Adequacy of Resources.....</b>	<b>52</b>
<b>Part 7. Project Evaluation.....</b>	<b>53</b>
Eval 1 - Eval 4. Evaluation of CIBE Activities.....	54
Eval 5. External Evaluation.....	55

**Center for International Business Education 2014-2018**  
**The Darla Moore School of Business**  
**University of South Carolina**

**Part 1. Meeting the Purposes of the Authorizing Statute**

**1.1. Introduction**

The Darla Moore School of Business (DMSB) of the University of South Carolina (USC) requests funding from the US Department of Education for support of a Center for International Business Education (CIBE). The DMSB has a long history of research and programmatic excellence in international business that has served the nation and materially enhanced the global competitive position of the United States. Federal funding for the period October 1, 2014 through September 30, 2018 will provide USC the opportunity to leverage this excellence and develop significant new activities and to sustain a number of the activities that will enable the USC CIBE to meet and exceed the requirements of the Higher Education Act.

As an introduction to USC, we have been a leader in international business education, beginning with the creation of the Master of International Business Studies degree in 1974. We added an undergraduate International Business (IB) major in 1998. Both our graduate and undergraduate programs are ranked by *US News & World Report* in 2014 as the #1 programs in the US in the specialty of international business, which was the 17<sup>th</sup> consecutive year for our undergraduate program. Our 40 years of consistent excellence in graduate and undergraduate programs and research in international business, and our innovative programs of outreach to other universities, are clear indications that the USC CIBE will serve as a national and regional resource to meet the goals of the legislation establishing the CIBE program.

Currently DMSB offers one of the most comprehensive set of international business specialty programs in the nation: doctoral programs with international business and international

finance majors, an International MBA, a Master in International Business (MIB) that has two dual degree options with partners abroad, an undergraduate IB major and a Mandarin specialization option. As a result of this funding period, however, the set of options for US students will be unsurpassed in the world. We will add an IMBA dual degree option with the #1 ranked MBA program in Latin America (EGADE), 4 new dual degree options for the MIB program that are planned with top universities in Italy, Turkey, China and Spain. We will add 7 new undergraduate cohort programs with partners in Chile, France, Germany, Egypt, Brazil, Australia and China. Our belief is that to be successful, future international managers must develop a much deeper understanding of the cultural and sociopolitical context within which their global operations reside. As a result, with every new program option, students will study at a partner institution for at least 2 semesters. Course development includes a new methodology for understanding the cultural and institutional contexts from a comparative perspective, and our curriculum design incorporates local partner expertise related to country and regional business practices. Thus, at the conclusion of the CIBE funding period, DMSB will be offering an unparalleled set of educational options for US students to build their international expertise in new and exciting ways.

Furthermore, it is important to note that in 1976 the DMSB established a separate department to serve as the primary focus for research and teaching in International Business, now known as the Sonoco International Business Department, as a result of a \$1.5 million endowment from the Sonoco Corporation. The IB department has 16 faculty members, with numerous faculty serving in key positions in the administration of DMSB, among them Dr. Kendall Roth, Senior Associate Dean for International Programs and Partnerships, Chair of the Sonoco International Business Department and Executive Director of CIBE; Dr. Tatiana

Kostova, Executive IMBA Faculty Director, CIBE Research Director; Dr. Hildy Teegen, Former Dean and CIBE Outreach Director; Dr. Andy Spicer, IMBA Program Faculty Director; Dr. Nancy Buchan, IB Major Faculty Director; and Dr. Gerry McDermott, MIB Faculty Director. Since its inception, DMSB's International Business Department's scholarly productivity has consistently ranked among the top 1 or 2 in the world.

## **1.2. Meeting the Purposes of the Authorizing Statute: Organization of the Proposal**

All activities proposed in this grant are designed to meet the purposes of the authorizing statute, competitive preferences and invitational priorities as identified in the Federal Register. Specific CIBE activities that accomplish the Mandated Activities, and both the Competitive Preference and Invitational Priorities, are enumerated in the Other Narrative Attachment, Section 3. During the grant period, the USC CIBE will engage in 39 activities comprised of 63 projects, that are grouped in five broad categories: (1) development of academic programmatic activities, (2) outreach to businesses, (3) outreach to academic institutions, (4) research in international business, and (5) program evaluation.

Part 1, Meeting the Purposes of the Authorizing Statute, provides a description of the set of all CIBE activities organized by category, with the exception of the research (Part 3) and evaluation (Part 7). Each activity is given a reference identifier that is applied throughout the Application Narrative, Abstract, Evaluation Schedule and Budget. Educational programmatic activities for graduate masters (**Graduate**) are discussed first, then doctoral (**PhD**) and undergraduate (**Undergraduate**) activities are discussed, followed by outreach activities to businesses (**Business**), and concluding with outreach activities to faculty and academic institutions (**Outreach**). Many activities and initiatives naturally span categories.

Part 2 of the proposal, **Significance of the Program**, outlines four major new initiatives developed as a result of a strategic planning process conducted by DMSB under the direction of the Senior Associate Dean, International Programs and Partnerships. These initiatives integrate various outreach, programmatic and research activities, providing cohesiveness to CIBE's activities and are themselves linked together in ways that complement each other. Additional details regarding activities critical to the new initiatives are discussed in Part 2 and cross-referenced to Part 1 of the proposal. In accordance with the stated evaluation criteria of the Department of Education, CIBE's research plans (**Research**) are outlined in **Quality of the Project Design**, Part 3. Finally, Part 7, **Project Evaluation**, outlines the activities involved in assessing the outcomes of this proposal. For reference, the four major new initiatives are:

**Initiative 1: Undergraduate Cohort Programs: Language and Multi-Country Collaboration**  
**Initiative 2: Comparative Institutional Analysis of Regional/SC Cluster Development**  
**Initiative 3: Expanding the International Research Focus: Comparative Institutionalism**  
**Initiative 4: The Africa Initiative**

### **1.3. Meeting the Purpose of the Authorizing Statute: Professional Graduate Programs**

#### **1.3.1. Master of International Business**

**Graduate 1: CIBE will support the development and growth of the Master of International Business (MIB) program, through dual degree partnerships with Bocconi University (Milan, Italy), Koç University (Istanbul, Turkey) and two other international institutions of higher education.** The Sonoco International Business Department, in collaboration with USC's Department of Political Science and School of Law, introduced a 30 credit hour MIB program in 2009. Employing a novel and leading multidisciplinary design, 60% of the course content is taught by DMSB and 40% by Political Science/School of Law. The MIB program accepts exceptional candidates with an undergraduate business degree, foreign language capability and prior international experience. The program is designed to provide an advanced

understanding of the political, economic and social-cultural dimensions of international business; and to develop an understanding of the cross-country variability of institutional structures.

Currently, DMSB has developed two dual degree options linked to the MIB program; first, with the leading business school in Germany, University of Mannheim with their Master in Management program which is ranked #16 in the world (*Financial Times*), and the second with ESCP Europe, one of the top ranked business schools in France, with the #2 ranked Master in Management program in the world (*Financial Times*). These dual degree programs enable students to study at each university for one academic year. The design significantly enhances the development and employability of US students whereby they acquire a high quality education at leading business schools abroad and gain robust insight into business practices and institutional arrangements in a country important (e.g. German, France) to US competitiveness.

During the grant period, CIBE will support the development and introduction of four additional dual degrees. First, we will introduce a dual degree with the Master of International Management program at Bocconi University, which is ranked #17 in the world (*Financial Times*). To enhance student placement opportunity, students in this program will participate in a required internship, arranged by Bocconi. The MOU for the program has been approved and the program will be launched in 2014-15 (see Program Brochure, Supplemental Narrative Attachment). Second, we will introduce a dual degree with the Master of International Management program at Koc University in Istanbul, Turkey in 2015-16 (MOU signed, pending approval from the Turkish Supreme Council for Higher Education). This program is important given that Istanbul is becoming a strategic regional headquarters location for US-based multinational corporations (MNCs) and leading multilateral organizations concerned with business globally (e.g. the World Bank Group). Third, initial negotiations have commenced with

prominent universities in Russia (Higher School of Economics, Moscow), China (Shanghai Jiao Tong), Spain (Instituto Empresa/IE), Netherlands (Erasmus University, and Peru (ESAN) with the objective of developing two additional dual degree programs in 2016-18.

### **1.3.2. International MBA Program**

**Graduate 2: DMSB will continue to offer the International MBA (IMBA) program, graduating bilingual students with significant in-country business experience.** The IMBA, in existence for 40 years, is the primary professional managerial degree at DMSB. This program targets individuals with substantial work experience (average is 5 years). It offers an advanced internationalized business core, elective courses focusing on international and functional business activities, intensive in-country foreign language training (3 months) across 8 language tracks and a required in-country internship (5-6 months). The internships are with a number of collaborating companies, the majority being foreign subsidiaries of US-based multinational corporations. All graduates are bi- or multi-lingual, have spent significant time living, studying and/or working in a second culture, and they are equipped academically to cope with the rigors of global competition. The 8 language tracks offered currently are Arabic, Chinese, Japanese, French, German, Italian, Portuguese, and Spanish. The FSI Category 3 language tracks (Arabic, Chinese and Japanese) require 3 years.

**Graduate 3: CIBE will support the development of a Russian language track within the IMBA Program in collaboration with Higher School of Economics (HSE) in Moscow.** DMSB signed a MOU with HSE in 2014. The next step in developing a partnership with HSE is to articulate specific programmatic areas of cooperation; the most important from DMSB perspective is a Russian track within the IMBA program. Russian track students would spend a

year in language instruction and complete an internship in Russia prior to returning to DMSB for business study. Dr. Andrew Spicer, IMBA Faculty Director will be responsible for this initiative.

**Graduate 4: CIBE will support the development of an IMBA dual degree program with EGADE Business School, Tecnológico de Monterrey, Mexico.** The most popular language track for IMBA students is Spanish. Mexico is the second most important trading partner of the US. Our international business students with expertise in Latin America, and Mexico in particular, have significant employment opportunities in positions advancing our nation's competitiveness and strategic goals. To enhance these employment opportunities, by preparing our graduate IB students for success in conducting business in and with the Latin American marketplace, we have reached agreement to develop a dual degree with the EGADE MBA. The EGADE MBA is ranked #1 in Latin America (*America Economía, 2014*). The EGADE faculty have complementary strengths in the areas of Marketing, and Entrepreneurship/Innovation, particularly applied to the Latin America business context. Thus, this dual degree will provide an exceptional educational experience to our students regarding Latin America, will enhance their employability in that region, and will give them the opportunity to interact and form networks with a cohort of future Latin American business leaders. The program will be designed and approved during 2014-16 and launched in fall 2016.

**Graduate 5: CIBE will support the design and implementation of an IMBA course module focused on Cultural-Institutional Assessment.** The purpose of this initiative is to design a methodology by which to develop the "cultural fluency" of students. By this we mean the analytical skills to assess and understand a culture--the "why" behind the sociopolitical, economic and institutional structures of a given country--particularly as they relate to business practices. The intent is to develop this capability through an explicitly structured process such

that the skill becomes transferable, i.e. students become more efficient and effective in understanding additional cultures that they encounter throughout their career. This skill is critical in our view, as an increasing number of countries are becoming part of the global economy, thus resulting in a proliferation of socioeconomic models, as countries employ their own forms of "capitalism". To the extent business practices are institutionally embedded, managers must have the capacity to understand locational context more deeply to successfully design or transfer products, services, business models or systems to new locations effectively.

The International Business Department hired two cultural anthropologists in fall 2014 (Dr. Ken Erickson, Dr. Alice Leri) for the purpose of designing programmatic initiatives that utilize ethnographic techniques to facilitate cultural-institutional assessment. During their language training and corporate internship, students will utilize ethnographic techniques to understand specific characteristics of their cultural setting as well as the cultural foundation underlying why specific business practices and institutions have emerged. Beyond learning to assess their host cultural-institutional context, the intent is to also structure tasks by which students reflect on their own values and emotional responses, so as to understand better their own personal acculturation processes. These activities will be incorporated into a revised course in the IMBA program that will span the time period students are abroad and will be applied to business issues identified in collaboration with internship companies.

This is a very important initiative that will provide a methodology for designing more effective international business experiential activities (e.g. study abroad) that ensure the desired outcomes of cultural learning, adaptation and acculturation. Once validated, the methodology will be codified into a Cultural-Institutional Assessment Manual, to be disseminated to the international business academic and practitioner communities. The first 2 years of the funding

period will focus on the design and evaluation process and the second 2 years on developing the Manual and accompanying pedagogical materials.

**Graduate 6: CIBE will support the development of language assessment procedures for IMBA language tracks.** Currently, the IMBA program assessment for language capability is based on the completion of a specified number of course credit hours. This does not provide a uniform standard for student assessment nor a market-recognized certification of language proficiency. Furthermore, there is a need for better placement in a wide range of levels of the in-country language courses as well as assessment of student progress from entry to exit within the overall IMBA program. Thus, CIBE will develop assessment procedures, and support testing certification (e.g. Language Testing Institute/ACTFL) for all language tracks in the program. Marcelo Frias, IMBA Managing Director will be responsible for this initiative.

**Graduate 7: CIBE will support the design and implementation of Text Analytics training within the IMBA program.** The ability to analyze and extract business value from unstructured text data is emerging as an important element of business analytics. Currently, text analytics is primarily conducted on English-based language text. Our IMBA students, with deep understanding of both the culture and language of major locations for business around the globe, are uniquely positioned to leverage text analytics in a broader context. CIBE will support on-site training of 6 students per year in IBM SPSS Modeler Text Analytics by an IBM-certified training partner to develop the international business applications of text analytics. This will provide a unique international skill set and enhance the employability of the students. DMSB management science professors Dr. Michael Galbreth and Dr. Mark Ferguson will lead this initiative, which will be introduced in 2015-16 and continue through the grant period.

### **1.3.3 One Year MBA**

**Graduate 8: CIBE will support the development of a MBA dual degree program with the University of New South Wales, Australian School of Business.** DMSB introduced a one-year MBA program in 2013. The University of New South Wales (UNSW) has a Master of International Business (MIB) program, with a focus on developing student expertise in international innovation and Asia-Pacific business. They have agreed (Dr. Chris Jackson, UNSW-Head of School of Management) to offer a USC-UNSW dual degree program comprised of their MIB and our one-year MBA program. This collaboration will provide a significant new opportunity for US students to become exposed to advanced training in Asia-Pacific business and processes related to international innovation and the associated commercialization processes. The program will be designed and approved during 2014-15 and introduced in 2015-16.

#### **1.3.4. Professional MBA Program**

**Graduate 9: CIBE will support an International Business Certificate for the Professional MBA (PMBA), through the development of additional short-term study abroad (STSA) opportunities for working professionals.** DMSB has been a leader in distance learning for working professionals since 1970, with the introduction of the PMBA program. In response to interest among these professionals, an International Business Certificate we developed to award students that take designated international courses and participate in an overseas study course. Approximately 40% of the 90-100 annual graduates elect this option. In 2011, we had 26 PMBA executives participate in a study abroad program; in 2014 the number was 68. We currently offer short-term programs to China (Beijing, Tianjin, Dandong), Europe (Vienna, Bratislava, Prague), Latin America (Santiago, Buenos Aires) and the Netherlands. To provide additional options and support growing interest in these courses CIBE will develop 3 additional overseas study courses, one each year for the first three years of the funding period,

for professionals in the PMBA program. Sara Easler, Director of Business Study Abroad, will work with DMSB faculty in developing these new programs.

#### **1.4. Meeting the Purpose of the Authorizing Statute: Doctoral Programs**

**PhD 1: CIBE will support the development of dual degree Doctoral Programs in International Business with partner institutions.** Dual degree doctoral programs with partner universities from select countries will help our students develop a deeper understanding of the global context and leverage ideas and knowledge created at locations throughout the world. Most management theories have been developed in the Western world and have a limited validity in other contexts such as emerging markets and developing economies. By working with colleagues abroad, students will be able to expand and modify current theory, incorporating the specific conditions of the foreign contexts and develop indigenous management theories arising from specific country settings. CIBE will facilitate the development of dual degree doctoral programs whereby student training and dissertation research will be a collaborative effort between faculty from USC and the partner institutions. Discussions with CUHK (Dr. Gordon Cheung, Associate Vice-President), Koç University (Dr. Zeynep Gurhau Canli, GSB Academic Director), Instituto Tecnológico y de Estudios Superiores de Monterrey, EGADE (Dean María de Lourdes Dieck Assad) and Universidad de Chile (Dr. Erich Spencer, Director of International Affairs) have been initiated with very positive response. Dual degrees in IB will potentially lead to a transformational development process in the training of US doctoral students. During the funding period, CIBE will formalize an agreement with at least 2 universities in 2014-16 and introduce programs in 2016-18.

#### **1.5. Meeting the Purpose of the Authorizing Statute: Undergraduate Programs**

##### **1.5.1. Undergraduate Cohort Programs: Chinese**

**Undergraduate 1: DMSB will continue to offer the International Business and Chinese Enterprise (IBCE) Cohort Program.** USC and the Chinese University of Hong Kong (CUHK) launched a partnership undergraduate program, (IBCE), that brings together 20 students from each institution into a cohort that spend 2 years together in undergraduate education (see Program Brochure, Supplemental Narrative Attachment, Section 3). The program is for students interested in careers with an emphasis on business between China and the US. It benefits from the unparalleled access that CUHK offers to China and Asia and their outstanding faculty and exceptional Chinese language programs. The curriculum incorporates a joint core of business and international business courses along with specialized courses that develop necessary language skills, regional expertise and advanced understanding of the practice of international business. For language development, our students begin instruction at USC, complete an immersion program at the Yale-China Chinese Language Center at CUHK in the summer before their sophomore year (330 classroom hours), take 2 additional language courses at the appropriate level during their sophomore year at CUHK, complete an immersion program with our Confucius Institute Partner, Beijing Language and Culture University (BLCU) the summer before their junior year (330 classroom hours), and then take additional language at USC during their senior year as needed to meet the required proficiency standard.

Through this methodology, DMSB students develop an (1) understanding of business concepts through completion of core and elective courses in a curriculum that meets AACSB accreditation standards; (2) understanding of international business through completion of an IB concentration/major; (3) expertise in a specific business discipline through meeting the requirements of a second business major; (4) understanding the business practices of the United States, China and Asia; (5) accredited proficiency in Mandarin Chinese at the Advanced Level;

(6) understanding of both Chinese and American culture and civilization and their impact on the conduct of business, developed through 2 years of study in each country; and (7) understanding of the interaction of business and government in both China and the US, the economic issues of the China-United States relationship and the political ramifications of these issues.

### **1.5.2. Undergraduate Cohort Programs: Language and Multi-Country Collaborations**

**Undergraduate 2: CIBE will develop cohort programs modeled after the IBCE program in the critical languages of Arabic (American University in Cairo) and Portuguese (Brazilian partner to be determined). CIBE will develop cohort programs in other foreign languages: French (Université Paris-Dauphine), German (University of Mannheim) and Spanish (Universidad de Chile).**

**Undergraduate 3: CIBE will develop two multi-country thematic-based collaborative cohort programs focused on specific regions/business practices important to US trade and competitiveness.**

The above two activities (Undergraduate 2, 3) represent major initiatives of CIBE for this funding period. The IBCE undergraduate cohort program has been exceptionally successful in developing US students that are fluent in Mandarin and have a rich understanding of Chinese business practices and culture. Their growth in maturity, as well as their exceptional ability to deal with issues of complexity and ambiguity, can be readily observed over the course of the program. As a result, the placement opportunity for the students has been unsurpassed. Furthermore, international relationships have formed within the cohort that will provide students a Chinese-US business network for life. Replicating this very successful model in other settings will make our students very competitive in other cultures and countries that are important to US trade and competitiveness. The form and structure of each cohort depends on a variety of factors

such as the difficulty of the language, the curriculum design and courses given by the partner institution, the fit with curriculum of DMSB, and the nature of the market for the program to undergraduate students. With each cohort program we will collaborate with the leading business school in the respective country. Such programs will enhance the quality of the education for our students and will equip them with the credentials of having studied at a highly regarded academic institution in those countries. Since this initiative is a central focus of the CIBE proposal, it is discussed in detail in the Significance of the Program (2.1) section (pg. 28-31).

### **1.5.3. International Business Major**

**Undergraduate 4: CIBE will support the development of IB Major language assessment procedures.** Currently, the assessment of language capability for IB major undergraduate students is based on the completion of a specified number of course credit hours. This does not provide a uniform standard for assessment of student progress and final proficiency. To address these issues, CIBE will develop assessment procedures and support testing certification (e.g. Language Testing Institute/ACTFL) for undergraduate language tracks and cohort programs. Dr. Nancy Buchan, IB Major Faculty Director, will oversee the development of language standards and assessment procedures.

**Undergraduate 5: CIBE will support an International Business Career Day.** Undergraduate students often lack an appreciation of international business placement opportunities and the progression of an international career. A very successful International Business Career Day was launched as a pilot in spring 2014 with more than 100 IB major students attending. The day was structured around a set of talks and panel discussions given by international business executives and DMSB Alumni, followed by networking between students and company representatives. Corporate participants included Morgan Stanley, NCR, P&G,

NBC Universal, J&J, Deloitte Consulting and Ernst & Young. CIBE will support the formalization of the IB Career Day, establishing it as annual event that includes corporate collaboration and sponsorship. Dr. Nancy Buchan, IB Major Faculty Director, along with the Alumni Office and the Office of Career Management, will direct this activity.

#### **1.5.4. Functional Major Programs**

**Undergraduate 6: Functional Department Corporate Boards.** DMSB IB majors are required to also major in a functional area; approximately 75% of the IB majors select Marketing (32%), Finance (24%) and Management Science (16%). Management Science has developed a Center/Corporate Advisory Board for their Global Supply Chain and Operations Management (GSCOM) undergraduate program. Corporate partners in this center include: Coca-Cola Bottling, Continental Tires, Michelin, Cummins, Palmetto Health, PwC and Siemens. Within the program, IB/GSCOM students work in teams under faculty and executive supervision on projects for the corporate members, developing value-added solutions to the member organizations in the areas of process improvement and global supply chain design. The projects span a semester with teams spending time on-site in the companies and culminate in a corporate presentation/GSCOM Summit, where all the sponsoring companies and teams are brought together for selected presentations and sharing of best practices. The design of this Corporate-DMSB collaboration has resulted in significantly enhanced internship and job placement for IB/GSCOM majors, as well as strengthening the our business partnerships.

CIBE will assist in the establishment of similar programmatic curriculum developments and corporate partnerships in the areas of Finance and Marketing. Centers involving business partners in these two areas will provide enhanced internship and placement opportunities for IB/Finance and IB/Marketing majors. Dr. Randy Rose, Chair of the Marketing Department, and

Dr. Stephen Mann, Chair of the Finance Department, will lead the initiative to develop a corporate advisory group in their respective areas.

**Undergraduate 7: CIBE will support the design and development of overseas short-term study abroad (STSA) programs.** All DMSB undergraduate students are required to meet a 9 credit hour internationalization requirement from a specific set of courses. Foreign language beyond the minimum University requirement and overseas study are among the methods that may be used in meeting this requirement. In 2010-11 DMSB offered 4 STSA programs, with 38 undergraduate students and 26 graduate students participating. This past academic year we offered 14 programs with 210 participants, 142 undergraduate students and 68 graduate students. Thus, there is increased excitement and interest among DMSB students in being part of a STSA program(s). During the grant period, we will provide course development support to expand our portfolio by 2 programs each year.

An objective is to also expand the form of our STSA offerings. Currently, we do not offer any service learning or research-intensive STSA programs; thus, those are priority areas. We also have an objective of additional STSA programs tightly integrated with both a location and functional focus (e.g. banking/finance in London and Zurich). Finally, we want to experiment with “embedded” STSA courses, since currently all our STSA programs are stand-alone. With this approach, rather than teaching a course over the full semester the onsite portion of the class will be taught in the first 7 weeks of the semester and then during spring break the abroad component occurs. Sara Easler, Director Business Study Abroad, will be responsible for this initiative. CIBE will annually support a student from our local MSI partner (Allen University) to attend a DMSB STSA program. These programs are open to all USC students.

#### **1.6. Meeting the Purpose of the Authorizing Statute: Outreach to Businesses/Government**

**Business 1: CIBE will develop and sponsor an ongoing program of Comparative Institutional Analysis of Regional/SC Clusters and Economic Development.** This is a major initiative of the CIBE during the funding period. The South Carolina (SC) Commerce Department has developed a focused innovation plan for the state economic development priorities, based on clearly identified core competencies (advanced manufacturing, advanced materials/composites, digital technologies and logistics/distribution) matrixed by 8 priority industry sectors that span the competencies. More broadly, New Carolina (South Carolina Council on Competitiveness) brings together a coalition of industry, governmental and academic leaders for the purpose of increasing state/regional economic competitiveness through a cluster development strategy. The cluster development strategy is focused on 15 clusters: advanced security, creative, agribusiness, automotive, aerospace, life sciences, composites, textiles, distribution and logistics, engineering, fuel cells, insurance, nuclear, recycling and tourism.

Partnering with the SC Commerce Department and New Carolina, CIBE will develop a program to enhance the State industry cluster development strategy and policy management process by introducing institutional comparative analysis. CIBE will develop teams comprised of faculty, students, executives and policy leaders, organized by targeted clusters. The teams will examine parallel clusters in different country locations to further understand the business strategies and policy and investment priorities that have a positive impact on growth and competitiveness. Given that this initiative is a central focus of the CIBE proposal, it will be discussed in further detail in the Significance of the Program (2.2) section (pg. 31-35).

**Business 2: CIBE will support the development of the Export-Market Entry Studies Initiative, in collaboration with the South Carolina Small Business Development Center (SBDC).** Supervised by International Business Professor Frank Ryzewski, this initiative will

offer to SBDC clients the opportunity for a DMSB team of students to assess the market potential for their products abroad. This may include a foreign market entry strategy assessing alternative country locations and entry mode, as well as studies examining the barriers, risk and opportunity for export specific products and services. It is anticipated that 10 studies will be conducted each semester on behalf of the client organizations. This activity was prototyped in 2014, and, based on the initial success, will be organized as a formal course component and marketed by SBDC as a central client service. CIBE will support data acquisition and other materials necessary to successfully conduct these studies.

**Business 3: DMSB will continue to offer open enrollment and customized firm-specific executive programs in International Business.** DMSB offers a variety of open enrollment and custom executive education programs through its Daniel-Mickel Center for Executive Education. DMSB faculty develop these international courses, either at the request of a corporate client or in response to market opportunities. Faculty involved in teaching executive education are typically also recipients of CIBE research funding, and these programs are one important vehicle where the research findings of our CIBE are brought into the global managers' toolkits. DMSB's reputation for programmatic and research excellence in IB have led a number of clients to commission customized programs, including Westinghouse US, Milliken, Flour Daniel and Sonoco. While no federal grant funds will be utilized in this activity, results from our Research Agenda (pg. 38-47) provides a foundation for the content disseminated in these programs. Over the life of the grant we anticipate that at least 400 executives will participate in customized and open enrollment programs in IB conducted by faculty of DMSB. This activity will be managed by Dr. Tim Carroll, Associate Dean of Executive Education.

### **1.7. Meeting the Purpose of the Authorizing Statute: National/Regional Outreach**

**Outreach 1: CIBE will develop and support an internationalization initiative for Minority Serving Institution (MSI) partners.** The USC CIBE, in collaboration with Georgia Tech and Duke University, will lead a MSI internationalization initiative working with approximately 20 MSIs from South Carolina, North Carolina and Georgia (see support letters, Other Narrative Attachment, Section 3). The Georgia Consortium, coordinated by Dr. Rajgopal Sashti, Director, consists of universities and colleges with objectives that include internationalizing the curriculum and providing study and research opportunities about other cultures. Dr. Flavia Eldemire (Allen University, Columbia SC) and Dr. Lucy Rueben (Duke University, NC) have facilitated the cooperation of South Carolina and North Carolina MSI contacts, respectively, and will work with these contacts to collaborate with the Georgia consortium.

This initiative is designed as a progression of internationalization activities over the 4 years of funding. It will incorporate faculty development programs, international business course development, faculty and student study abroad and research paper development activities. The activities are aimed at infusing an understanding of international business into the curriculum of MSI participants. This will be achieved by equipping faculty from MSIs and community colleges with the pedagogical tools and experiences to incorporate international content into existing business courses and develop new courses, as well as providing students with study and work abroad opportunities. An integral component of the program is one-on-one assistance provided by the sponsoring CIBEs to MSI faculty to facilitate the implementation of international business education programs and courses, help develop capabilities for leading study abroad programs and increase faculty expertise in global and international education.

In the first year of the grant period, USC faculty will offer a two-day FDIB conference modeled after our current FDIB programs (Outreach 4), to provide an introduction to internationalizing the curriculum of existing business courses or developing IB-specific courses. The seminar will be held at a central location (e.g. Atlanta, Charlotte, Columbia). During the conference, MSI faculty needing support in developing international courses will be identified. From this group, MSI faculty willing to engage in a mentoring process will then be assigned to international business faculty at USC, Georgia Tech and other participating CIBE universities. The mentoring will focus on detailed course design and tailoring content as needed to stimulate student interest and learning. This mentoring will continue through the CIBE funding period.

USC currently offers a short-term study abroad program designed for faculty interested in developing such a program. In the second year, USC CIBE will support MSI faculty to attend either this program or one of the DMSB STSA programs. Assistance will then be provided to MSI faculty that participated in a STSA program to design and implement a STSA course on their own campus. In addition, there will be a student scholarship component to defray some of the expense associated with STSA opportunities. In year 3, select MSI and Community College faculty will be sponsored to attend one of our Faculty Development Programs in International Business (FDIB). In year 4, USC CIBE will organize a research paper development workshop for MSI faculty. After the workshop, as papers are accepted for presentation at professional association meetings, CIBE will provide travel stipends to support faculty presenting their research. USC CIBE will designate Allen University (Columbia, SC) as its local MSI Partner for the funding period. Beyond the consortia activities, Allen University faculty and students are eligible for funding support for CIBE STSA programs, SLI and FDIB programs.

**Outreach 2: CIBE will organize and host an Annual International Business Research Conference focused on Comparative Institutions and Governance Research.** The USC CIBE has developed a well-defined research agenda focused on comparative institutionalism (see Part 3 Quality of Project Design). Beginning fall 2014, CIBE will organize and host an Annual International Business Research Conference on topics from the research agenda specified in Part 3. Specific conference topics and the faculty designated as Conference Chair will rotate each year to parallel the annual research theme. This conference is viewed as an effective vehicle for disseminating our findings and advancing leading ideas in international business that are critical to US global competitiveness, by engaging scholars from other institutions throughout the world. Dr. Kostova will chair the conference in 2014-15.

**Outreach 3: CIBE will organize and host a Culture and Finance Conference in collaboration with the *Journal of Corporate Finance*.** DMSB international finance faculty (Dr. Chuck Kwok, Dr. Omrane Guedhami) along with Dr. Raj Aggarwal (Univ. Akron) and Dr. Mara Faccio (Purdue) are editors for a special issue of *Journal of Corporate Finance* focused on the impact of culture and institutional context on national financial systems, corporate financial practices and corporate governance. The conference will assemble scholars prior to paper submission to promote and facilitate the development of high-quality research. The conference will be spring 2015 with the journal issue publication date in 2016.

**Outreach 4: CIBE will deliver, and offer scholarship assistance to faculty from institutions of higher education to attend five different Faculty Development in International Business (FDIB) Programs.** Initiated in 1988, the DMSB FDIB programs offer faculty from US business schools the opportunity to develop their ability to teach an undergraduate or graduate course in International Business. The faculty members at DMSB

provide participants with pedagogical advice and guidance as well as teaching materials, including class notes, PowerPoint presentations and assignments, supporting participants to offer international courses at their institutions. Approximately 40 faculty members enroll in one of five courses each year: (1) Survey of International Business, (2) Global Operations and Supply Chain Management, (3) International Financial Management, (4) International Management, and (5) International Marketing. Each course provides 27 contact hours of instruction. Over the next grant period, approximately 150 faculty members from US business schools will be trained to teach courses in the disciplines covered by FDIB. Dr. Tatiana Kostova is responsible for the management of DMSB FDIB programs. Scholarships will be made available to support faculty attendance from community colleges and/or MSIs with at least one scholarship designated for a faculty member from our local MSI partner, Allen University.

**Outreach 5: Development of new FDIB program courses.** Our current FDIB courses have a functional focus. DMSB International Business Department has developed innovative thematically-focused international business courses that are significantly enhancing the development of international business students in understanding international competitiveness. To further expose faculty from other US business schools to these new, important and international business course offerings, we will develop and offer 4 new thematic one-week FDIB courses during the grant period: International Business Negotiations (Dr. Nancy Buchan, Dr. Hildy Teegen), Comparative Corporate Governance (Dr. Marc Van Essen, Dr. Omrane Guedhami), Comparative Institutional Systems and Varieties of Capitalism (Dr. Gerald McDermott, Dr. Michael Murphree) and Islamic Economics, Finance and Management (Dr. Omrane Guedhami, Dr. Alice Leri). These new courses will be presented within the existing FDIB program, with one new program developed and proposed annually.

**Outreach 6: CIBE will offer a FDIB Sub-Saharan Africa program.** This FDIB program provides an opportunity for faculty to develop an understanding of the nature of business in Sub-Saharan Africa and the opportunities for US businesses to increase involvement in the region with the objective of infusing Africa content into academic courses and as a foundation for future research activities (see Program Brochure, Supplemental Narrative Attachment). A major theme is Chinese investment in Africa and US competitiveness and challenges in the region in the face of such influence. The FDIB Sub-Saharan Africa program will be offered annually during the grant period. CIBE will provide partial and full scholarships to participants from previously underrepresented schools, primarily to community colleges and MSI faculty. This program will also be sponsored by a consortium of other major universities and colleges, to include Colorado-Denver, Pittsburgh, Michigan State, Texas A&M, Indiana, Georgia State, Minnesota, Florida International and other leading US academic and business institutions. The annual two-week overseas study program will be led and managed by Dr. Robert Rolfe and Mike Shealy and conducted in at least 3 countries in Sub-Saharan Africa, with projected rotating locations to include South Africa, Mozambique, Swaziland, Kenya, Tanzania, Namibia, Botswana, Zambia and/or Zimbabwe. Institutions in Sub-Saharan Africa partnering with CIBE for this program include the University of Witwatersrand (Johannesburg, South Africa), Utalii College (Nairobi, Kenya), University of Zambia (Sambia, Lusaka).

**Outreach 7: CIBE will co-lead a new FDIB MENA program focusing on the Middle East and North Africa with Brigham Young University and the University of Colorado-Denver.** Working with a consortium of other universities, and in keeping with the USC CIBE Africa initiative (Part 2, 2.4 The Africa Initiative, pg. 37, 45-47), we will co-lead a FDIB-MENA program to be initially offered in January 2016 and recurring annually thereafter. While an

important region for the global economy, MENA has not been sufficiently covered by CIBEs to date. The program will begin in Oman or Dubai, then move to Egypt and either Tunisia or Morocco. Its purpose is to help participants in developing an understanding of the region, facilitating their relationships within MENA and integrating examples about the area in their academic courses. The North Africa portion of the program will be the responsibility of USC, while faculty from the UC-Denver, BYU and/or USC will lead the Middle East portion. For USC, Dr. Doug Woodward, Dr. Rob Rolfe and Mike Shealy will be responsible for this initiative. CIBE will make scholarships available to attend this annual FDIB program.

**Outreach 8: CIBE will co-sponsor the FDIB China/Hong Kong program.** The China Faculty Development Program, managed by University of Colorado - Denver and co-sponsored by Brigham Young University, Florida International University, San Diego State University, University of Hawaii, University of Pittsburgh, USC, and University of Washington, will be held in January annually during the grant period. MSI, community college, and new faculty participation will be encouraged. Faculty will examine major economic and sociopolitical opportunities and challenges facing China. They will observe China's changing role in the global economy, US and indigenous companies operating in China, and the Chinese business culture.

**Outreach 9: CIBE will conduct a Workshop on Teaching Spanish for International Business for Professors of Spanish.** To meet one of the primary purposes of CIBE Program, the USC CIBE created the first workshop for foreign language professors to infuse international business content within a language course, so as to teach the business-specific use of a foreign language. In the grant period, CIBE will initiate a new Workshop on Teaching Spanish for International Business in June of each year, starting 2016. The first part of the workshop is a two-day Introduction to International Business, focusing primarily on business practices in Latin

America, taught in Spanish by Dr. Gerald McDermott; the second part, a four-day program directed by Dr. Bruce Fryer of USC Beaufort and by Dr. Michael Doyle of the UNC Charlotte, focuses on the development of a curriculum for business Spanish courses to be offered on participants' campuses. The program will target high school teachers, community college instructors, and faculty representing MSI institutions and will be offered concurrently with the annual FDIB Seminars (Outreach 4) each June. The FDIB-Spanish Workshop will emphasize the crucial elements of business vocabulary, basic business concepts, and the cultural context for business Spanish activities. Approximately 50 high school, community college and MSI Spanish teachers will be provided with instruction and materials on the latest methods of incorporating business language content into Spanish language curricula and teaching business Spanish courses. Mike Shealy, CIBE Director, will oversee this initiative.

**Outreach 10: CIBE will sponsor and further develop the USC Summer Language Institute (SLI).** The College of Arts and Science launched the SLI in the summer of 2013. The program provides intensive language immersion training for business professionals, graduate and undergraduate students. Enrolled students can earn 12 credit hours in the institute, with language instruction 5 hours per day, 5 days a week and cultural activities in the evening. Spanish and the critical languages Chinese and Portuguese will be offered in summer 2014. CIBE will provide annual scholarships to support students enrolling in the institute, with one scholarship designated for a student from our local MSI partner, Allen University. CIBE will also support offering of additional languages by the institute, specifically adding Arabic, French and German during the funding period. Dr. Nicholas Vazsonyi, Interim Chair of Languages, Literatures & Culture Department of the College of Arts and Sciences will be responsible for this activity.

**Outreach 11: CIBE will participate in the CIBE Business Language Conference**

**Consortium.** Currently all CIBE universities participate in this consortium, which sponsors the Annual CIBE Business Language Conference, an annual conference that brings together business Spanish faculty from national research universities, MSIs, community colleges and high schools to present best practices, research findings, and workshops on teaching Spanish for business. CIBE will support language faculty members annually to participate in this conference and serve as a steering committee member for the consortium.

**Outreach 12: CIBE will continue its membership in the Consortium for Undergraduate International Business Education (CUIBE) and Global Business School Network (GBSN).** CUIBE is a consortium of 35 universities that work with business schools seeking to establish or enhance undergraduate international business majors that include foreign language requirements, international internships, or other experience abroad. USC CIBE will continue as a member of the steering committee, which is comprised of five CIBE and five non-CIBE schools. GBSN is a network of 39 business schools from around the globe which carry out leadership development projects in emerging market countries.

**Outreach 13: Collaboration with International Magnet Middle/High Schools.** A growing number of primary and secondary schools in South Carolina are attempting to internationalize their curricula, and as they do so, they have sought to draw on the expertise of DMSB to help translate an understanding of globalization and international competitiveness to their classrooms. In this initiative we will collaborate with public high schools (e.g. AC Flora) and middle schools (e.g. Irmo Middle School) to promote the development of international skills, cultural awareness and the understanding of globalization. Specifically, the initiative includes, a) working with teachers to develop curriculum around globally themed units, and b) providing

students and teachers with a framework to compare institutional contexts. To address the first part, DMSB faculty will provide a day-long workshop to interested primary and secondary educators, similar in format to the FDIB program, but tailored more to the high school level. For the second part, DMSB IB students have formed a service group--the International Business Student Ambassadors. The Ambassadors will visit the schools in the fall semester and share their experiences of studying abroad while also imparting to them the comparative institutional framework they have learned in their IB program. Then in the spring semester students will have the opportunity to share in the experiences of the IB undergraduates as they go abroad that semester, by following the blogs of 10 IB student bloggers and interacting with them virtually to then create mini-comparative institutional studies. Dr. Nancy Buchan will oversee this initiative.

### **1.8. Competitive Preference and Invitational Priorities**

All CIBE activities that support both the Competitive Preference Priorities and Invitational Priorities are detailed in the Other Narrative Attachment, Section 3. **Competitive Preference Priority 1.** The initiatives of USC CIBE include collaborations with professional associations (e.g. SBDC, SC Department of Commerce, New Carolina) and also incorporate activities that will develop significant collaborations with businesses (e.g. Business 1, 2; pg. 17) for the purpose of expanding employment opportunities for IB students. **Competitive Preference Priority 2.** CIBE has proposed significant and sustained activities supporting the internationalization of MSIs, with approximately 20 cooperating colleges and universities in South Carolina, North Carolina and Georgia. The overall design of this initiative is presented in Outreach 1 (pg. 19). **Invitational Priority 1.** The proposal includes 10 activities focused on language instruction and assessment. **Invitational Priority 2.** A major initiative of the CIBE proposal is the Africa Initiative (2.4 Significance, pg. 37) that includes both collaborations (e.g.

Nigeria LNG, Lagos Business School, Pan-African University-Nigeria) and partnerships (e.g. University of Witwatersrand-Johannesburg, Utalii College-Nairobi, University of Zambia) in Sub-Saharan Africa. The CIBE proposal also includes partnerships (ESSEC-Singapore) and collaborations (e.g. INSEAD-Singapore) in Southeast Asia.

## **Part 2. Significance of the Activities: Principal Initiatives**

DMSB provides a comprehensive set of programmatic, outreach, academic and executive education activities that meet the stated purposes of the authorizing statute (See Other Narrative Attachment, Section 3). To achieve maximum benefit to those who participate in CIBE programming, we have developed a systematic strategy for the conduct of international business education activities that relate to the specific needs of our students and our other stakeholders. A significant portion of funding in this grant period will be devoted to 4 new principal initiatives. CIBE will play a major role in developing these new initiatives and will assume additional responsibilities for programmatic activities over the grant period. More detailed discussion of each follows. While these 4 initiatives are featured in this portion of the proposal to indicate the interconnectedness of all CIBE related activities, it is important to note that CIBE will continue to support the broad range of outreach and educational activities carried on at DMSB, as well as support the research base for all of these activities. The new activities planned within these initiatives utilize the expertise generated from other CIBE activities.

**2.1. Significance: Undergraduate Cohort Language Programs and Cohort Multi-Country Collaborations.** DMSB is developing a set of exceptional academic programs at the graduate and undergraduate levels that incorporate the creation of cohort structures, groups comprised of students from DMSB and at least one non-US business school, who will share common curriculum components and outside the classroom experiences at each institution as part of a

curriculum designed to develop special international business skills tailored to specific regions of the world. These programs leverage DMSB research capacity focused on understanding comparative institutional contexts. Our cohort programs are novel and they represent an advanced pedagogical approach to developing international expertise. At the undergraduate level, we have two basic IB cohort forms; language programs and multi-country programs.

CIBE will support developing a comprehensive set of language-focused cohort programs, essentially replicating the successful IBCE model established with Chinese University of Hong Kong (Undergraduate 1, pg. 12). The basic objective of our new language cohort programs are analogous to the IBCE program; each will have a major language component to develop competency in the language and significant time in country with a cohort of local students who will come to the US for study as well. They are designed to provide students the opportunity to develop an in-depth understanding of each business culture and country context, which is critically important for enhancing US trade and competitiveness with these partner countries. Furthermore, since our partners are the leading business schools in each respective country, students are provided with an exceptional academic experience. The expected outcome is to expand US student employment opportunities in the short-term through the unique and in-depth business expertise and experiences that are gained, and in the medium term, from the lifelong relationships the students will form within the cohort.

During the funding period, four new undergraduate cohort language programs will be introduced. We have developed a new Arabic cohort program collaborating with the American University in Cairo, named the International Business and the Middle East-North Africa (IBMENA) program. Each partner accepts 15 students; USC students will become proficient in Modern Standard Arabic at the advanced level, as well as develop an understanding of global

business practices and economic issues between US and the MENA region. While currently approved, the program launch is postponed until the political environment in Egypt has sufficiently stabilized to reduce student risk.

CIBE will support the implementation of a Spanish cohort program. This cohort program has been formally approved and will be implemented during the 2014-15 academic year. The program is named International Business of the Americas (IBA) and is a collaboration with Facultad de Economía y Negocios - Universidad de Chile (FEN). It is designed for students interested in international business careers with an emphasis on commerce between the US and South America. Each partner accepts 20 students and the students will spend a year at both campuses, taking at least one class each semester as a cohort group. US students are expected to take a substantial portion of their business coursework at FEN in Spanish. The program includes a wide range of cultural and business experiential activities to facilitate cohort formation as well as become familiar with the local institutional context.

Two additional cohort language programs will be developed and approved in 2014-16, and launched 2016-18. We are in the final stages of the MOU approval for a French cohort program in collaboration with Université Paris-Dauphine. We are in the initial stages of the MOU development for a German cohort program in collaboration with University of Mannheim. Both of these programs will be structured similarly to the IBA program. During the funding period, we will also begin exploring cohort language programs for Portuguese and Japanese.

CIBE will also support the development and implementation of two multi-country cohort collaborations (Undergraduate 3). The multi-country cohort programs have a broader regional focus and emphasize specific thematic areas of study. Our focus group research indicates enthusiastic interest in the proposed programs. The first program has students going to Australia,

China and the US. We are collaborating with University of New South Wales, Australian School of Business and CUHK-Shenzhen to develop this program whereby students from the 3 universities come together and study one semester at each campus. The thematic focus of this cohort program will be developing expertise in Asia-Pacific business and the management of international business innovation processes. The three partners have reached an informal agreement to collaborate and the structure of the program has been designed. The objective is to launch the program in Fall, 2016.

The second multi-country cohort program features US, Europe (Paris, Mannheim), Asia (Singapore) and Brazil (Rio de Janeiro). This program is a partnership with University of Mannheim, ESSEC-Singapore, Fundacao Getulio Vargas-Rio de Janeiro and DMSB. As a cohort, students will study at each partner school for one semester. The curriculum includes a distributed course structure whereby students develop a comparative assessment and understanding of the institutional structures and business practices across each of these major regions of the world. The model design has each partner responsible for curriculum that leverages their distinct capabilities: Mannheim-accounting and control systems and European business practices, USC-international business, ESSEC Singapore-Asian management practices and decision-making under uncertainty, FGV-management in emerging economies. In summary, these proposed language and multi-country cohort programs represent innovative and exciting opportunities for students to develop a richer understanding of international business and also enhance their employment opportunities.

**2.2. Significance: Comparative Institutional Analysis of Regional/SC Cluster and Economic Development.** DMSB has distinct capabilities in understanding the cultural and institutional context of international business. Context is critical for designing and implementing successful

strategies to penetrate overseas markets and attract investment capital to further competitiveness for US firms. DMSB brings substantial expertise in thought leadership through decades of scholarship across a diverse and compelling portfolio of research faculty who work with our students in disseminating cutting edge thinking around culture and institutions. Our flagship programming in international business (IMBA, MIB and IB Undergraduate Major) relies heavily on intensive in-country study and work experiences for our students to facilitate internalizing the important differences in culture and institutional settings that impact business success, industry competitiveness and concomitant economic development.

Our international business programming can be further enhanced by leveraging understanding of the Regional/SC institutional context in key industry sectors that are critical to the regional economy as a basis for carefully constructed contextual comparisons between countries. By initially analyzing the social, regulatory, economic and political factors that matter for firm success locally, we can provide our students with an opportunity to more meaningfully absorb and compare this context with other country contexts. By focusing our comparison on industry clusters important to regional competitiveness explicitly with locations abroad that are strategically important to the region trade, investment and/or innovative activities, we can both enhance our students' learning and their preparation to serve as leaders for globally-relevant firms here in the US. Importantly, this analysis can provide regional/SC businesses and policy leaders insight into priorities and policies to enhance US trade and competitiveness.

In this collaborative initiative, we will design and pilot field study courses for various populations of our students, in conjunction with business executives and policy leaders in industrial sectors that are critical in the southeast region are compared and contrasted with parallel industry clusters abroad. Our primary partners in this initiative are the SC Department of

Commerce (including their leaders of Trade, Investment/Workforce Development and Innovation) and New Carolina, a collaboration of industry leadership in strategically important industry clusters within the State of SC (see letters of support, Other Narrative Attachment, Section 2). In addition, we will incorporate faculty and students from universities in the locations abroad (collaborating with our Global Exchange Partners). Participants in this program will gain understanding of these critical sector clusters and the respective institutional setting at play in both locations. In addition, by collaborating with businesses and other enabling organizations at home and abroad, our university work will directly promote cross-border business development to advance trade, investment, and innovation in important sectors for our domestic economy. This collaborative public-private initiative is structured to include the following course components:

**1. Overview of institutional context and why it matters for business success and industry competitiveness.** This work is directly informed by the research program of DMSB faculty in this area, the Cultural-Institutional Assessment Manual (Graduate 5) project, cluster-focused research (Research 5-7) and other leading research identified through our Annual Comparative Institutions and Governance Research Conference (Outreach 2).

**2. Selection of key industry clusters and country pairs for pilot launches.** The SC Commerce Department and New Carolina partners are committed to working with us to prioritize the most important industry sectors and respective partner countries to focus our field site work in ways that leverage existing programming and priorities for our state and its business leaders.

**3. Development of sector analysis for key industry clusters to be included in field study work overseas.** This work will be led by course faculty and conducted using primary and

secondary data sources from South Carolina, the southeast region, US and the comparison country(s). The research will include site visits and guest lectures (firm leadership, industry leadership, policy community, USC alumni active in sector, etc.). This sector analysis will highlight key challenges and will frame the institutional context to compare with the overseas location(s). The analysis will be formally presented for review to cluster leadership (firm leaders within the sector) and policy leaders at the Commerce Department and New Carolina and will be continually updated with each subsequent generation of program participants such that the analysis will remain relevant for business and policy leaders. It will be housed on the SC Dash website, an extant collaboration between DMSB and the SC Department of Commerce that serves as the clearinghouse of all information relevant to SC economic development.

**4. Development of sector analysis for key clusters within the overseas field site.** This work will extend the Regional/SC analysis into the overseas site through primary field research with relevant businesses, government agencies and nongovernmental organizations. A team of students and faculty from DMSB will be accompanied by business and policy leaders from SC so that the field experiences will serve also as initial global business development opportunities. It is anticipated that participants will continue their interaction through internships with participating firms and government agencies seeking to leverage opportunities discovered during the sectoral analyses and site visits. Much of this activity is envisioned to complement our partnership with the SBDC Network (Business 2) through foreign market analysis projects for small and medium-sized exporting firms. The analysis will be formally presented for review and will be updated and disseminated as per the Sector Analysis for SC indicated above. Both the SC and the overseas field site sectoral analyses and their comparison will further inform the

Cultural-Institutional Assessment Manual refinement (Graduate 5), Research (Theme 2), and the annual Comparative Institutions and Governance Conference (Outreach 2).

We envision the launch of 4 distinct pilot sites with recurring engagements in prior countries to deepen our understanding of key markets while providing relational continuity for opportunities identified and assessed with potential business partners. Over time, we anticipate developing a portfolio of additional country sites based upon the competitiveness priorities of the SC Department of Commerce and New Carolina Council on Competitiveness.

**5. Illustrative site/cluster/host partner pairings mapped to Regional/South Carolina Competitiveness**--to be refined in consultation with SC Department of Commerce and New Carolina Council on Competitiveness:

**Spring 2015 Peru (Agribusiness, Tourism or Textiles) ESAN University**  
**Spring 2016 China (Textiles or Automotive) CUHK and Peking University**  
**Spring 2017 Germany (Automotive, Recycling or Composites) Univ. of Mannheim**  
**Spring 2018 India (Biotech or Logistics) Indian School of Business (Hyderabad)**

Other high potential alternatives would include studies in The Netherlands focused on Distribution and Logistics with our partner Erasmus University, Brazil focused on Aerospace or Composites with our partner FGV, and Israel focused on Life Sciences or Advanced Security with our partner Hebrew University of Jerusalem.

### **2.3. Significance: Expanding the International Research Focus: Comparative**

**Institutionalism.** Consistent with the CIBE Program requirements, the USC CIBE is designed to strengthen international business education and promote understanding of international competitiveness of US businesses through research. For the 2014-18 funding period, CIBE will strengthen its focus and capability to serve as the national research center for the study of international business from interdisciplinary and institutional perspectives. Understanding the institutional context and its impact on firms' strategies and organization is increasingly critical in

today's global business environment. First, most countries around the world, including the developed markets of the European region, and countries like Japan, South Korea, and the US are undergoing significant structural and institutional changes in an effort to address economic growth and to prevent future financial crises from occurring. Being aware of such developments and understanding the implications for their strategies and organization is essential for MNCs performance globally. Second, more than ever, US MNCs are conducting business in uncertain, volatile and institutionally immature country environments in emerging markets and developing economies across Asia, Africa, and Latin America. Developing analytical and managerial capabilities to function in such conditions is increasingly critical for these companies. Third, MNCs from these markets, especially Chinese MNCs are aggressively entering global markets and are threatening the leadership position of Western firms in a wide range of industries. Understanding what these trends mean for US MNCs and how to sustain US trade and global competitiveness is of paramount importance.

The study of the variety of institutional systems across countries and its implications for MNCs competitiveness, strategies, and organization has been the overarching theme in our research program. In this grant period, we develop this work further by focusing on additional topics addressing what we view to be the most important current challenges for US MNCs. There are three main research themes that the USC CIBE will support in 2014-18:

**Theme 1 - Comparative Corporate Governance, Institutions and Global Strategy**

**Theme 2 - Industry Clusters, Innovation and Global Competitiveness**

**Theme 3 - Managing Global Political Risk and Legitimacy of MNCs**

A secondary research dimension that permeates all three themes is the regional focus whereby we will support in-depth contextual research to develop managerial competences in the increasingly important regions of Africa, East Asia and Latin America. Our objective is not only

to produce such knowledge but to also disseminate to academic and business executives, to our degree candidate students through new courses and program initiatives and to other business students across the country through our FDIB outreach activities where we train faculty from other universities. The research program is compressively discussed in Part 3 (pg. 38-47).

**2.4. Significance: The Africa Initiative.** This section describes the CIBE Africa Initiative and provides an introduction to how the research, academic and outreach activities of DMSB work together to address critical national concerns. A central theme of this activity over the 2014-18 period will be our continuing development of programs and research activities linked to the continent of Africa, both North Africa and Sub-Saharan Africa. Our African interests are rooted in the emerging policy priority of US relationships with Africa, the as yet untapped potential of the region for US business, the role Africa is increasingly playing in critical resources with challenging security considerations and the relatively undeveloped state of African institutions. The challenges facing Africa are immense and far-reaching. While the Sub-Saharan region needs additional foreign aid, it also needs enterprises that create jobs and revitalize the economy. The creation of such productive enterprises in turn will provide opportunities for development of trading links between Africa and the US. Sub-Saharan Africa poses a significant security problem with its growing poverty, spreading disease, and potential for social disruption. Despite substantial problems, many US companies are discovering that it is possible to invest and even thrive in the African region. The success of these US multinational/local linkages can be seen in the retail sector. Africa's largest private employer, Coca-Cola, now has operations in all Sub-Saharan Africa countries, with advanced marketing and distribution knowledge spreading to local businesses. The linkage between an advanced US business system and African entrepreneurs has helped foster a new class of retail entrepreneurs.

CIBE proposes activities that will increase US competitiveness and security through its Africa initiative. As with all our major initiatives, the initial impetus comes from research (Research 3.3). While many Chinese and Indian companies have moved rapidly to take advantage of new economic opportunities in Africa, US companies have been slower to develop effective investment strategies. The African research initiative will examine how the competitive dynamics in Africa have changed thereby impacting US strategic positioning. Courses at the undergraduate and graduate level based on this research will be enhanced. For example, the existing undergraduate courses on Competitive Strategies in Developing Countries and Business in Africa will be expanded to include emerging information. The undergraduate travel study course in African business will be conducted annually.

The IMBA Arabic track incorporates activities in North Africa (Graduate 2). As part of CIBE's outreach to the faculty at other business schools, the annual FDIB Sub-Saharan Africa program (Outreach 6) will be continued to help participants develop linkages and relationships within Africa, integrate Africa business practices and economic development strategies into their academic courses, and spark interest in potential business research in the African economy as it applies to US global competitiveness. The new FDIB MENA (Middle East & North Africa) (Outreach 7) will be offered beginning in January 2016, with visits to the Middle East and North Africa to learn more about the region, develop relationships within the region and integrate examples about Africa in courses. Faculty expertise supporting the CIBE Africa initiative include Dean Peter Brews, a native of South Africa; Dr. Lite Nartey, a native of Ghana; and Dr. Rob Rolfe, who spent his formative years in Zimbabwe and is fluent in Swahili.

### **Part 3. Quality of Project Design**

In 2005 DMSB engaged in a series of strategy sessions to consider the future of the field of international business and our positioning within it. Three issues were deemed critical for pushing the frontier of international business. First, while the historical foundation of international business is based on the explanation of crossing an economic border, we recognized that crossing sociopolitical and sociocultural borders were increasingly critical to theories explaining international business. Second, we determined there was need, and a significant opportunity, to enhance theory development by leveraging the international context as a source for novel theory building. Third, we came to the conclusion that the field needed to focus on larger and more important questions, important not only because of the issues addressed but also in the potential to impact public policy. We recognized that addressing this agenda required multilevel and multidisciplinary research capability, and a heightened attention to deeply contextualized studies. It required developing a network of scholars across the globe to facilitate local access as well as provide indigenous insight and understanding.

In response, we hired a group of international business scholars with strong disciplinary backgrounds, including political science, sociology, anthropology and economics. We hired scholars that are highly regarded experts in specific countries or regions of the world. We revised our promotion and tenure criteria to reward interdisciplinary and disciplinary-based research. Furthermore, we redesigned our graduate and undergraduate international programs to incorporate regional courses to enhance context-specific understanding, created thematic courses that incorporate multidisciplinary perspectives, added deep contextualized experiential activities in country and designed new programs that are collaborative with other disciplines as well as programs that have students spending extensive time with partner institutions. Our intent is to be the world leader in deeply contextualized comparative institutionalism. Our programmatic

initiatives, outreach activities and research in the CIBE proposal are all designed to further develop and extend this focus. Our international partnerships, as well as the collaborations with professional associations and businesses, are being created to facilitate this contextual understanding at all levels of the college, from undergraduate to master students, doctoral education, as well as faculty exchanges, collaborations and research.

Thus, CIBE will support a comprehensive research initiative with the objective of furthering a coherent and sustained program of international business scholarship, and the application of that research to our educational and outreach efforts. The proposed research program builds on our prior research platform and expands it into new critical areas of inquiry. It is aimed at enhancing the ability of US companies to compete through greater understanding of the institutional embeddedness of business and of the effective strategies and structures that they must follow given the new realities in the world economy. This section presents the outline of the three main research themes.

**3.1. Theme 1: Comparative Corporate Governance, Institutions and Global Strategy.** The interest in corporate governance and its effects on companies' strategy and performance has resurged after the global financial crisis of the last eight years, which many blamed on flawed governance. Corporate governance has also become front and center due to the rise of emerging market firms, many of which are state-owned or state-controlled, as well as the increased globalization of non-traditional companies like family firms and small and medium size enterprises. US MNCs need to understand how to best compete with these new types of global players. This theme includes the following specific projects:

**Research 1: State-Owned Enterprises and Private Benefits of Control: A Cross-National Extension of Principal-Principal Agency Theory.** In emerging economies, perhaps

the single-greatest governance problem stifling firm growth, the capitalization of equity markets, the availability of private credit and economic development in general is the persistence of excessive Private Benefits of Control (PBOC), i.e., the additional private benefits stemming from a controlling position in the firm, which add up to the cash flow benefits of fractional ownership. PBOC take several forms: perquisites enjoyed by controlling executives; excessive, performance-insensitive pay enjoyed by controlling executives; ‘tunneling’ sales of corporate assets to other firms that are wholly or majority owned by controlling insiders; and inside informational advantages, the private equivalent of insider trading. This research will extend understanding of PBOC by exploring the role of government owners that have a broad range of possible sanctions at their disposal to police against controlling owners extracting PBOCs, ranging from fines, surplus taxes, revoking of licenses, and at the extreme, incarceration of private persons and the expropriation or nationalization of firms.

**Research 2: Family Firms: Key Determinants of Prevalence, Strategy and Profitability.** Family firms are dominant economic actors in terms of growth and employment around the world, yet research on these types of organizations is still disproportionately scant compared to non-family firms. This research will extend findings that suggest cross-country variation in family firms’ prevalence, strategic choices, and performance. It will address the question “How does the national institutional context affect the prevalence, strategic choices and performance of family firms?” The study will employ a novel conceptualization and measurement of institutional forces, the notion of “family-legitimizing environment” – the extent to which a national context is characterized by a distinctive set of social structures, relationships, and values that lend centrality to the family as the basic unit of economic production and to kinship ties as the predominant carrier of social and economic exchange.

**Research 3: Family Control and Corporate Social Responsibility: Evidence from East Asia.** There is little evidence on how family control affects firms' Corporate Social Responsibility (CSR) activities. The research will examine two opposite views on family firms with respect to their CSR behavior. The positive view is based on the longer investment horizon of family firms, the goal of maximization shareholder value in the long run as well as their stronger reputation concern. The negative view emphasizes the priority of the family as a controlling major stakeholder at the expense of other stakeholders. The concentrated ownership structure gives controlling families incentives to expropriate minority shareholders to gain private benefits of control, especially in East Asia. The study will examine the relationship between family control and CSR with new ownership data and updated CSR data from 9 East Asia economies. Results will be compared to findings in the US.

**Research 4: Business Groups and Socioeconomic Outcomes.** A fundamental question in emerging markets is whether business groups have beneficial or negative effects in their host societies. This research will address questions of whether business groups are conducive or detrimental to socioeconomic welfare with data on business groups in 15 countries, spanning the period between 1962 and 2010. The objective is to identify the conditions under which business groups are a positive developmental force, and also distinguish the differential effects of business group performance and prevalence on socioeconomic outcomes.

**3.2. Theme 2: Industry Clusters, Innovation and Global Competitiveness.** The global financial crisis and the fast developing emerging markets have highlighted the important role of governments and partnerships with other firms for achieving global competitiveness. As companies are competing with the rest of the world for the same customers and markets, so are regions and countries competing to create institutional conditions that promote innovation and

entrepreneurship and attract leading firms and foreign direct investment. This research stream will examine the formation of industry clusters, public-private initiatives, the implementation of regional and national policies, and transnational regimes.

**Research 5: Industry Clusters and Firm Strategy.** Industrial clustering has become an increasingly important economic phenomenon. The geographic proximity of co-locating in the same cluster is viewed as helping firms transfer knowledge and facilitate innovation. On the other hand, firms located in the same cluster tend to be competitors, competing for the same resources and customers. How to help companies balance the cooperation and competition dynamics and achieve superior performance is the central topic of this research. This research will help US companies to better understand the competitive nature of clusters, in order to be more innovative and competitive in the global market. Our research will focus on the following questions: “How do firms compete and cooperate with each other in clusters?”; “How is innovation promoted in clusters?”; “How do clusters evolve?”, “How can we facilitate the growth of clusters?”, and “How do clusters differ across the world?”

**Research 6: Clusters: The Case of China and Impact on Global Competition.** China has emerged as the world factory. One of the China’s driving forces is a unique form of economic activity - township industrial clusters, which account for 10% of the total China GDP in 2010 (PRC Yearbook, 2010). Based on the Chinese central government’s census, there were about 5,660 township industrial clusters in China by the end of 2007, and the number has increased since. Despite the growing importance of township industrial clusters, the research on this phenomenon has remained limited, especially with regard to the differences between this organizational grouping in China and clusters in developed economies. The study will address the following research questions: “What factors enhance the innovativeness and competitiveness

of a township cluster?”, “How do township clusters affect MNCs investment decision regarding location choices, and mode of entry?” and “How do governments intervene in clusters and how do they impact cluster and firm competitiveness?” The findings will provide US companies with a better understanding of their township clusters competitors in China. It will also provide policy insights on how to build effective local clusters.

**Research 7: Local Innovation for Competing in Global Markets.** This research will examine how societies in emerging markets learn to create innovative capacities that enable their firms to improve or upgrade their processes and products. The research lies at the intersection of network evolution and comparative institutional configurations for competitive advantage. It focuses on the ways in which non-market industry support institutions facilitate or impede the ability of local firms to learn from one another, absorb new knowledge and upgrade their processes and products. It captures two key sources of international knowledge and technology flows: export oriented firms and suppliers for locally based subsidiaries of foreign MNCs. Knowledge networks and roles of support institutions in key manufacturing and agricultural sectors will be mapped, mainly in Argentina, Brazil and Mexico.

**Research 8: Transnational Regulatory Integration and Development.** This research analyzes the conditions under which emerging market countries are able to incorporate new transnational regulations (public and private) at both the firm and public institutional levels. Transnational regulations are diffused via regional transnational integration regimes (TIRs) and transnational value chains of specific industries. This research identifies how different integration mechanisms emerge and shape the abilities of local actors (governments, NGOs, firms) to adapt the new standards to local contexts and improve domestic regulatory institutions and firm practices. This work will focus on the public and private regulations in such domains as

food safety, labor conditions and banking within Mexico (NAFTA), Argentina and Brazil (Mercosur) and Poland and Romania (EU).

**3.3. Theme 3: Managing Global Political Risk and Legitimacy of MNCs-Africa Focus.** As discussed in Section 2.4 (The Africa Initiative, p 37), US companies are lagging in strategic investment and thus competitiveness in Africa. During the funding period, we will build on our position as a leader in Africa business research and education by conducting research on Africa-related topics. The exposure of MNCs to extremely volatile, risky, and institutionally underdeveloped foreign country environments has reached unprecedented levels. Not only are companies investing in search of new markets and low cost resources, but they are also locating high value-added activities to tap into local opportunities and talent. Ensuring success and protecting firm-specific assets and proprietary knowledge requires new types of organizational capabilities including political strategies to manage relationships with local governments and other influential constituents and deliberate management of companies' reputation and legitimacy. This research theme will explore these issues focusing on high risk and growing destinations for foreign direct investment, particularly Africa.

**Research 9: Stakeholder Engagement in the Extractives Industry.** This research program seeks to outline effective strategies for US MNCs to manage their relationships with various stakeholders in Africa. It examines the dynamics between and among firms in the extractive industries (oil, gas and mining) and local social, political and economic players including governments, nongovernmental organizations, activist groups, and legal bodies. The initial phase of this project comprised large-scale data collection of relations between firms and stakeholders in the mining industry. The second and currently ongoing phase uses qualitative studies to understand firm-stakeholder relations. A case study of stakeholders in the Niger Delta

region in collaboration with Nigeria Liquid Natural Gas (Nigeria LNG) is central to this research. Other collaborations with oil and mining companies in various other countries are being explored, including in Ghana and the Democratic Republic of Congo. USC scholars are currently in contact with the Ghana Chamber of Mines to explore these extensions, Ghana Supply Chain Development at CDC Development Solutions, which is an American nonprofit working with USAID in Ghana, and the Ghana Chamber of Oil and Gas.

**Research 10: Chinese Investment in Africa.** This research program explores the competitive strategies used by private and state-owned Chinese firms in African countries. The massive Chinese investment in Africa, often to the detriment of US multinationals, is a growing policy and business concern. This research program will study the model used by Chinese investors and the institutional factors that explain its success including specific social, economic, political, and institutional conditions, the deliberate political strategies of Chinese investors in their dealings with African governments, and the sustainability and social impact of these investment models. The project is in collaboration with scholars at INSEAD-Singapore, Beijing Axis Consulting located in Beijing, and the Center for Chinese Studies at Stellenbosch University in South Africa.

**Research 11: Social Innovations Targeting Actors at the Bottom of the Pyramid-The Case of Mobile Money.** This research program explores the adoption and utility of an important social innovation, mobile money, in Sub-Saharan Africa. The potential for mobile money to transform the lives of the economically disadvantaged populations who are excluded from access to traditional financial services has been widely touted by development-focused institutions. While mobile money has taken off through the M-PESA model in Kenya, it has not been successfully replicated in other low-income African countries. This research program seeks

to identify the barriers to adoption of mobile money, the current uses of mobile money by the unbanked poor, and the unmet needs in this area. Data collection will include surveys of unbanked poor in rural Ghana and Nigeria and mobile money users in other African countries such as Tanzania and Uganda. The study is in collaboration with faculty from the Lagos Business School, Pan-African University in Nigeria and Ashesi University in Accra, Ghana.

**Research 12: Institutional Factors Affecting Diffusion of Mobile Money and Mobile Health across Sub-Saharan Africa.** This research program is a large-scale project focusing on diffusion of mobile money and mobile health across Africa. The objective is to identify the institutional factors that enable diffusion of mobile phone use for financial transactions and the dissemination of health information. The mobile money platform enables those without access to formal banking to engage in financial transactions. The mobile health platform enables health providers to care for patients with chronic diseases, where texting is used by local nurses for medical instruction and monitoring, thereby improving access and efficacy of health care in rural areas. A large data set is currently being created at USC that tracks the diffusion of mobile money and mobile health across the 50 countries in Africa and explores social, cultural, political, and institutional factors that accelerate or hinder these processes. The next phase will comprise engagement with local providers to examine the drivers and barriers of diffusion.

### **3.4. Competitive International Business Research Program**

**Research 13: CIBE Scholars.** In addition to the research activities associated with the research themes, CIBE will award up to 4 research awards (\$2,500 each) per annum on topics consistent with the CIBE mandated activities, through an open competition. A committee composed of the Senior Associate Dean of Research and Academics, Director of the Division of Research, CIBE Research Director, CIBE Executive Director or their designees, will review

research proposals prior to October 1 of each grant year. Faculty from our local MSI partner, Allen University, will be eligible for receiving research awards.

#### **Part 4. The Management Plan**

The USC CIBE is housed in the Darla Moore School of Business. Overall management of DMSB is the responsibility of Dean Peter Brews, a South African native who came to the USC from UNC-Chapel Hill where he served as Associate Dean of OneMBA, a global Executive MBA program delivered in collaboration with CUHK, EGADE-Tec de Monterrey, FGV-Sao Paul and Erasmus University. Dr. Kendall Roth, Senior Associate Dean for International Programs and Partnerships, is responsible for the international activities of DMSB and will serve as the Executive Director of CIBE. The responsibility of the CIBE Executive Director includes oversight of all CIBE activities and liaison with other units of DMSB, other participating administrative units on campus and all external constituencies served by CIBE. The CIBE proposal focuses on the development of new initiatives that are then integrated with the administrative structure of DMSB. Serving also in the role of Senior Associate Dean for International Programs and Partnerships helps insure the effective integration of these CIBE initiatives with the overall priorities of the School.

Mike Shealy serves as the Director of CIBE. He began his career with DMSB CIBE as the Managing Director in October 1994. He has served on numerous committees of CIBE Managing and Associate Directors, including the planning committees of the Managing Director's meetings, the CIBE Business Language Conferences and the CIBWeb committee. Within DMSB there are 6 staff assigned to the Office of International Activities, which reports to the Senior Associate Dean. The unit is comprised of 2 staff in DMSB Study Abroad Office (Sara Easler, Director of Business Study Abroad; Amanda Birkenhauer, Assistant Director) and 4

Regional Directors that provide coordination and oversight to DMSB programs and activities in major area of the world. Mike Shealy is also a Regional Director, overseeing Africa, Middle East and Italy. Louis Dessau is the Regional Director for Latin America, Denmark, Finland and Sweden. Angel Earle is the Regional Director for Europe, and David Hudgens is the Regional Director for Asia.

While the CIBE and Office of International Activities teams provides operational support for the international programs and partnerships of DMSB, as described in the project descriptions, there is shared responsibility across the school for CIBE initiatives. As detailed in the activity descriptions, there is widespread faculty involvement both within DMSB as well as within the USC system. The proposal is quite ambitious but the proposed projects and timelines are consistent with the pace of development DMSB has achieved during the last 4 years.

Thus, the methodology for integrating CIBE responsibility with the on-going administrative structure of DMSB and USC is well developed. The organizational structure of DMSB and the management plan with timelines are included in the Other Narrative Attachment, Section 5. Administrative arrangements for the comprehensive Evaluation Plan for CIBE activities are discussed in Other Narrative Attachment, Section 8.

#### **Part 5. Quality of Project Personnel**

The USC CIBE is committed to equal opportunity with regard to race, color, religion, sex/gender, national origin, age, disability, sexual orientation and veteran status for participants in all proposed activities as well as in the project management personnel. Dr. Kendall Roth is the Senior Associate Dean for International Programs and Partners, Executive Director of CIBE, Director of the International Activities and Chair of the Sonoco International Business Department. He is also a member of the USC International Advisory Committee. He has been a

faculty member at DMSB since 1986 and holds the Cantey Chair in International Business and Economics. He is a Fellow of the Academy of International Business and serves on the Editorial Boards of *Academy of Management Journal*, *Strategic Management Journal*, *Journal of International Business Studies* and *Global Strategy Journal*. His oversight within DMSB includes international partnerships, international programs (IB Major, MIB, IMBA), international scholarship activities as well as the international business faculty. This span of responsibility provides for exceptional strategic coherence in direction, resource allocations and integration across all international activities. Reporting to Dr. Roth is a team of faculty with operational oversight for specific international programs. Dr. Tatiana Kostova, a native of Bulgaria, is the CIBE Research Director and also responsible for the CIBE FDIB programs. She is an AIB Fellow and is one of the most prolific scholars in the field of international business. She holds the Buck Mickel Chair of International Business. After earning her doctorate at the University of Minnesota, she joined DMSB faculty in 1996. Her dissertation was awarded both the Barry Richman Best Dissertation Award of the International Management Division of the Academy of Management and the Richard Farmer Best Dissertation Award of the Academy of International Business. Dr. Kostova is the Faculty Director of the Global MBA and Executive IMBA programs, both joint programs with Tec de Monterrey.

Dr. Hildy Teegen is the Director of CIBE Outreach and holds the USC Educational Foundation Chaired Professorship of International Business. She was the Dean of DMSB 2007-2013 and, before joining USC, was the Director of the George Washington University, Center for International Business Education and Research. Her scholarly focus is on the interactions between firms, governments and nongovernmental organizations. She served as department editor (Institutions and Comparative Capitalism) for *JIBS*. Dr. Gerry McDermott is the Faculty

Director of the multidisciplinary Master of International Business (MIB) program and all the MIB dual degree programs. He received his Ph.D. in Political Science from MIT. He is a Senior Research Fellow, IAE Business School, Buenos Aires and a Fernand Braudel Senior Research Fellow at the European University Institute. His scholarship focuses on the impact of industrial networks on the creation of governance institutions in emerging or post communistic countries. He also examines how public-private collaborations can build innovation capacity in emerging economies such that firms can upgrade out of low equilibrium traps. He was recognized as the Outstanding MIB Teacher in 2011, 2012 and 2014.

Dr. Nancy Buchan graduated from The Wharton School, University of Pennsylvania, and is trained in behavioral economics particularly applied to issues of social dilemmas and trust. Fluent in Japanese and a Moore Research Fellow, she is the Faculty Director of the Undergraduate IB major as well as all of the international cohort programs. Dr. Andrew Spicer is also a graduate of The Wharton School. He is an expert in Russian and East European studies, and has particular interest in the institutional context of poverty and the normalization of corruption. He is the Faculty Director of the International MBA. Prior to this role, Dr. Spicer served as the Director of DMSB Sustainable Enterprise and Development Initiative and remains as the Faculty Advisor for the Net Impact Student Group. Dr. Omrane Guedhami, a native of Tunisia, is a Moore Research Fellow and serves as the director of the International Business and International Finance doctoral programs. His expertise is in comparative corporate governance, privatization and liberalization, particularly applied to emerging markets. Each of these faculty members are exceptional as scholars and teachers as well as administrators, which further facilitates integration of our international business knowledge generation with programmatic initiatives and curriculum design.

## **Part 6. Adequacy of Resources**

The Darla Moore School of Business at USC has made a major institutional commitment to meeting the objectives of the CIBE program by creating innovative international business academic programs, conducting leading edge research in international business, by serving regional and national businesses engaged in trade and international business and by creating a strong, capable International Business faculty along with developing the international skills of faculty members of other departments in the school. CIBE requests between \$364,230-\$364,985 per annum in Federal assistance during the grant period. Direct matching for CIBE related projects is the same per annum. Substantial additional financial support to the international activities of DMSB is provided by the University but not used in Federal matching for this grant. The total budget for international activities in DMSB, not including the resources provided by CIBE, is in excess of \$3 million per annum.

CIBE, the Office of International Activities and Business Study Abroad are located on the 3<sup>rd</sup> floor of the new DMSB facility. This \$106.5 million, 251,891 sq. ft., facility was completed July 2014. The building is designed to facilitate greater interaction between faculty and students and is on track to become the largest LEED Platinum building in SC, with the objective of being a Net-Zero rating through a partnership between DMSB and the US Department of Energy. It is located in central proximity to USC's Innovista area, a major research and development park.

The Darla Moore School of Business is named for USC graduate and New York financier Ms. Darla Moore, whose initial \$25 million endowment gift has since been supplemented by a pledge of an additional \$45 million which has been matched externally. The commitment to DMSB by its business partners and alumni provide the financial assurance that the School's

commitment to excellence in International Business will be maintained over the life of the grant and well into the future. The Sonoco Corporation has given \$1.5 million to endow the Sonoco International Business Department and \$1.0 million to endow a Visiting Professorship in International Business. A Chinese industrialist, Mr. Wang Wenliang recently pledged a \$1 million gift to create the Wang Initiative supporting China focused-international business research and programmatic initiatives. Since the activities of CIBE and the IB Department are closely intertwined, a portion of the matching funds shown in the grant application will be drawn from both the Wang gift and Sonoco endowment income. These generous contributions to DMSB provide a flexible underpinning to the School's substantial allocation of other funds to support its international activities.

#### **Part 7. Project Evaluation**

CIBE will employ evaluation methods that provide information to allow continuous improvement and enhancement of our activities, and to develop a system that places that information in the hands of decision makers who have the responsibility of making the necessary changes. CIBE complies and reports complete IRIS data, as required by the Department of Education. Annually, summary data are provided concerning IB and language courses, students, faculty, existing and new programs, degrees awarded, graduate placements, collaborations, events, research, travel, and expenditures. Where possible, existing methods of evaluation are utilized (e.g. AACSB and SACs assessments). In addition, the CIBE Center Advisory Council will meet annually to conduct an overall review and evaluation of activities. Dr. Brian Klass, Senior Associate Dean for Academics and Research has overall responsibility of assessment and accreditation activities. Ms. Latrice Ratcliff-Small is Assessment Director.

There are 4 primary CIBE activities that are assessed: graduate programs, undergraduate programs, outreach programs and research activities. The first 2 clearly have their objective as the provision of a set of educational activities to achieve certain goals. Outreach and research activities are more complicated to evaluate, as the first must also relate to the goals of the individual, institution, firm, or government entity being supported. Research is perhaps the most difficult to evaluate, as the impact of scholarly research is diffused through a wide net of scholars and practitioners in ways that work out over a long time horizon.

**Eval 1-Eval 4: CIBE will conduct detailed and comprehensive evaluations of CIBE activities in the four primary areas of outreach, graduate education, undergraduate education and research, during each year of the grant period, using internal and external evaluators as appropriate.** The evaluation activities are presented in detail in the Other Narrative Attachment, Section 8. Each evaluation activity is identified with information regarding its characteristics. Three primary classifications are used: **1) *Quantitative or qualitative***: Many evaluation activities will be both, as the instruments used for data collection will have questions that require numerical evaluation and questions that are open-ended; **2) *Formative or summative***: The primary type of data collected will be summative (measuring the final performance of the individual participant), but will be formative or summative for the assessment of the activity. It is the latter characteristic that will be listed; and **3) *External or internal***: External in this context means that the data is provided by an individual external to USC. For example, our interns are evaluated by their internship supervisor, who is an employee of the firm providing the internship. Internal means that USC students or personnel provide the data. Based on enunciated program goals, evaluation activities are planned around two 3-year periods. In the attachment to this section of the proposal, the complete set of evaluation activities

for the academic programs are given in chart form. These evaluation activities will be completed within 60 days of the conclusion of each grant year. Once the evaluation activities are completed, 4 documents are prepared within another 30 days: 1) *Evaluation and Annual Statistical Abstract of CIBE Outreach*, prepared by the CIBE Director from assessments relating to CIBE outreach, 2) *Evaluation and Annual Statistical Abstract of the Graduate International Programs*, prepared by the DMSB Assessment Coordinator from assessments relating to the IMBA program, 3) *Evaluation and Annual Statistical Abstract of the Undergraduate International Business Major* from assessments relating to the undergraduate IB major prepared by Ms. Ratcliff-Small, 4) *Evaluation and Annual Statistical Abstract of CIBE Research*, prepared by the CIBE Research Director from assessments relating to CIBE-sponsored research.

**Eval-5: DMSB will establish an engage faculty experts to evaluate program activities and to suggest strategic improvements and changes.** Dr. Pankaj Ghemawat, Anselmo Rubiralta Professor Global Strategy, IESE Business School, is a leading international business scholar and educator. He recently served on the AACSB Globalization of Management Education Task Force, authoring a chapter in the Globalization of Management Education report entitled “Responses to Forces of Change: A Focus on Curricular Content.” A widely recognized expert on globalization curricula, he has agreed to serve as an external reviewer for the CIBE programs and activities for the overall grant period. Dr. Ghemawat will be joined by one additional faculty member (TBD) and will conduct an assessment that will address the extent to which the program mandates of CIBE grant are being achieved. They will also provide an assessment with regard to the overall strategic direction of DMSB’s international activities. A 2-day visit to DMSB in the third year of funding is planned.

## Other Attachment File(s)

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\* **Mandatory Other Attachment Filename:**

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To add more "Other Attachment" attachments, please use the attachment buttons below.

## **Section 1**

### Other Narrative Attachment Form

- Acronym Key
- CIBE Advisory Council
- CIBE Advisory Council Appointment Letter

## Acronym Key

AACSB	Association to Advance Collegiate Schools of Business
ACTFL	American Council on The Teaching of Foreign Languages
AIB	Academy of International Business
AUC	American University in Cairo
BLCU	Beijing Language and Culture University
BYU	Brigham Young University
CDC	CDC Development Solutions
CIBE	Center for International Business Education
CSR	Corporate Social Responsibility
CUHK	Chinese University of Hong Kong
CUIBE	Consortium for Undergraduate International Business Education
DMSB	Darla Moore School of Business
EGADE	Escuela de Graduados en Administración y Dirección de Empresas
EU	European Union
FDIB	Faculty Development in International Business
FEN	Facultad de Economía y Negocios, University of Chile
FGV	Fundação Getulio Vargas, a Brazilian higher education institution
FSI	Foreign Service Institute
GBSN	Global Business School Network
GDP	Gross Domestic Product
GSCOM	Global Supply Chain and Operations Management
HSE	Higher School of Economics
IB	International Business
IBA	International Business of the Americas

IBCE	International Business and Chinese Enterprise
IBMENA	International Business and the Middle East-North Africa
IMBA	International Master of Business Administration
J&J	Johnson & Johnson Family of Companies
JIBS	Journal of International Business Studies
LEED	Leadership in Energy & Environmental Design
LNG	Nigeria Liquefied Natural Gas
MBA	Master of Business Administration
MENA	Middle East and North Africa
MERCOSUR	Mercado Común del Sur
MIB	Master of International Business
MIM	Master in Management
MMM	Master in Management
MNCs	Multinational Corporations
MOU	Memorandum of Understanding
M-PESA	M for mobile, Pesa is Swahili for money
MSI	Minority-Serving Institution
NAFTA	North American Free Trade Agreement
NBC	National Broadcasting Company
NCR	A global tech company
NGOs	Non-Government Organizations
P&G	Procter & Gamble Company
PBOC	Private Benefits of Control
PhD	Doctor of Philosophy
PMBA	Professional Master of Business Administration
PRC	People's Republic of China

PwC	PricewaterhouseCoopers
SBDC	Small Business Development Center
SC	South Carolina
SLI	Summer Language Institute
STSA	Short-Term Study Abroad
TIRs	Transnational Integration Regimes
UC-Denver	University of Colorado Denver
UNC	University of North Carolina
UNSW	University of New South Wales
US	United States
USAID	United States Agency for International Development
USC	University of South Carolina

## **CIBE Advisory Council**

The Center Advisory Council was initially formed April 28, 1989, from the International Business Advisory Board of the then College of Business Administration.

The Advisory Council has met at least annually since the CIBE was established in 1990. The most recent meeting was conducted September 30, 2013, and the next scheduled meetings are September 2014 and April 2015. During this grant proposal period, the Center Advisory Council will meet at least annually to assess and advise on the program and activities conducted by CIBE.

The Center Advisory Council shall include:

- 1. One representative of an administrative department or office of the institution of higher (or a combination of these institutions):* **Dr. Allen Miller, Vice Provost and Director, International Programs, University of South Carolina**
- 2. One faculty representative of the business or management school or department of the institution (or a combination of these institutions):* **Dr. Peter Brews, Dean, Darla Moore School of Business, University of South Carolina**
- 3. One faculty representative of the international studies or foreign language school or department of the institution:* **Dr. Nicholas Vazsonyi, Chair, Department of Languages, Literatures and Cultures, University of South Carolina**
- 4. One faculty representative of another professional school or department of the institution, as appropriate:* **Dr. Robert Cox, Chair, Department of Political Science; Director of Walker Institute, University of South Carolina**
- 5. One or more representatives of local or regional businesses or firms:* **Mr. Barry Saunders, Vice President and Chief Financial Officer, Sonoco, Hartsville, SC; Mr. William Reynolds, Chairman and CEO, Laser Print Svc. Inc, Columbia, SC**
- 6. One representative appointed by the Governor of the State in which the institution (or a combination of these institutions) is located whose normal responsibilities include official oversight or involvement in State-sponsored trade-related activities or programs:* **Mr. David Clayton, Director of Research, South Carolina Department of Commerce (letter of appointment attached)**
- 7. Such other individuals as the institution of higher education (or a combination of these institutions) deems appropriate such as a representative of a community college in the region served by the center:* **Dr. Hildy Teegen, Professor of International Business, University of South Carolina; Dr. Tatiana Kostova, Professor of International Business, University of South Carolina; Dr. Flavia L Eldemire, VP-Institutional Advancement; Chair, Division of Business Administration, Allen University, Columbia, SC; Dr. Lucy Reuben, Prof. of Practice of Business Administration, Duke University.**



State of South Carolina  
Office of the Governor

NIKKI R. HALEY  
GOVERNOR

1205 PENDLETON STREET  
COLUMBIA 29201

May 13, 2014

Mr. David Clayton  
South Carolina Department of Commerce  
1201 Main Street, Suite 1600  
Columbia, South Carolina 29201

Dear Mr. Clayton,

As Governor of South Carolina, I am hereby confirming your appointment as a member of the International Business Advisory Council with term to commence May 13, 2014, and expire at the pleasure of the governor.

I am grateful that you would allow me to take advantage of your willingness to serve the people of South Carolina in this position. I am confident that you will render exceptional service. God bless.

My very best,

A handwritten signature in black ink that reads "Nikki".

Nikki R. Haley

NRH/krp

A handwritten note in black ink that reads "Thanks David!".

Thanks David!

## **Section 2**

### Other Narrative Attachment Form

- CIBE Assurance Form
- Letter of Support – South Carolina Department of Commerce
- Letter of Support – New Carolina
- Letter of Support – South Carolina SBDC

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## CIBE Assurance Form

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**INSTRUCTIONS:** Applicants are required to provide the following assurance. This assurance form must be signed by the authorized representatives of the applicant. Upload this form as item #2 in the Other Narrative Attachment Form section of the e-application.

The applicant hereby assures and certifies that:

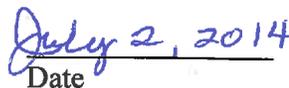
1. In addition to conducting the extensive planning activities required under the eligibility section of the statute, the Center Advisory Council shall meet not less than once a year after the establishment of the Center to assess and advise on the programs and activities conducted by the Center;
2. There shall be ongoing collaboration in the establishment and operation of the Center by faculty of the business, management, foreign language, international studies and other professional schools or departments, as appropriate;
3. The education and training programs of the Center will be open to students concentrating in each of these respective areas, as appropriate, and that diverse perspectives will be made available to students in these programs.
4. The applicant will use the assistance provided under this program to supplement and not to supplant activities already being conducted by the applicant.

Debra J. Wingard  
Senior Sponsored Program Administrator  
Name and Title of Authorized Representative

Signature



Date





Nikki R. Haley  
Governor

**SOUTH CAROLINA**  
DEPARTMENT OF COMMERCE

Robert M. Hitt III  
Secretary

June 3, 2014

Review Committee  
US Department of Education  
Centers for International Business Education and Research Program  
Washington, DC

Dear Review Committee:

On behalf of the South Carolina Department of Commerce, I am writing this letter to express support for the proposal to renew the Center for International Business Education and Research (CIBER) at the Moore School of Business at the University of South Carolina (USC) in the upcoming grant cycle.

As the leading economic development agency for the state, we recognize that a critical component to growing our state's economy is to continue important collaborations with our research universities in South Carolina to make sure that our state's workforce is equipped with the skills and knowledge that the jobs of the future will require. The University of South Carolina has a flagship program in international business and is a globally recognized leader. We look forward to continuing our work with the Moore School at USC in the coming years as South Carolina advances our commitments to trade, foreign investment and innovation that actively and creatively takes advantage of global business opportunities.

It is my understanding that the University of South Carolina has proposed to engage students in exchange and experiential activities in South Carolina and abroad, and leverage the university's global alumni network to compare South Carolina to important countries overseas through field study projects with USC students, faculty, alumni and our own South Carolina business community. This dovetails our efforts to build economic momentum around key sectors in South Carolina's economy, and enhance and shape our state's investment, trade and innovation opportunities.

Thank you for considering the University of South Carolina's proposal to renew CIBER.

Best Regards,

A handwritten signature in black ink, appearing to read "R M Hitt III".

Robert M. Hitt III

RMH/al/vw



**NEW CAROLINA™**  
SOUTH CAROLINA'S COUNCIL ON COMPETITIVENESS

June 12, 2014

US Department of Education  
Centers for International Business Education  
Washington, DC

Dear Review Committee,

I am pleased to offer this letter of support in recognition of our collaboration with the Darla Moore School of Business at the University of South Carolina around industry competitiveness in the US. New Carolina - South Carolina Council on Competitiveness is a statewide, business-led organization that identifies, launches and builds scale behind economic growth initiatives. The organization's signature work is in the development of regional industries through clusters, as well as programs that address systemic issues threatening South Carolina's economic progress.

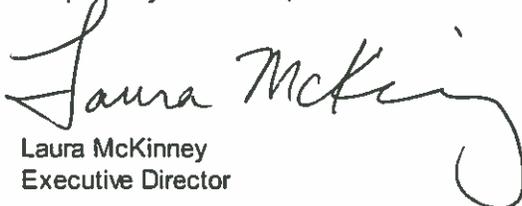
We have collaborated extensively with the Moore School around our state's cluster strategy over the past 10 years and have leveraged their faculty and student engagement on a number of initiatives in the past. The Moore School is one of six institutions in the United States affiliated with Harvard Business School's Microeconomics of Competitiveness course which teaches a case study on New Carolina and South Carolina's growth in cluster development.

The current project envisioned within this grant renewal proposal concerns mapping overseas field experiences to industrial clusters in our region such that compelling comparisons between the US and strategic overseas markets can be drawn and that new business opportunities can be identified and executed for our cluster firms. This proposal would directly connect the work of the University to the relevant cluster activities within South Carolina with important impact on the growing success of our identified clusters.

Given the strong legacy of excellent international business education at the Moore School, we are certain that our region's most competitive firms in our most strategic industrial clusters will benefit greatly from this novel programming to explore new markets, new sources of investment capital and new innovative ideas through these field studies. We believe that these experiences will also serve to help our clusters identify and attract the Moore School's world-class talent as interns, consultants and permanent hires into their firms in support of their globalization activities.

Thank you for your consideration of this proposal and know that we stand ready to provide the connectivity and convening power associated with our competitiveness work with our industry clusters to ensure that the Moore School's overseas field studies are meaningful and relevant to the advancement of our economy.

Respectfully Submitted,



Laura McKinney  
Executive Director

June 9, 2014

Dr, Kendall Roth  
Chair, International Business Department  
Darla Moore School of Business  
1705 College St.  
Columbia, SC 29208

Dear Kendall,

On behalf of the South Carolina Small Business Development Centers (SC SBDC), I am pleased to express our support of your CIBER proposal. The SC SBDC has worked with Professor Rydzewski for the last two years on collaborative projects with his classes. We consider this initiative to be highly successful and see added value for all parties if it is further enhanced and expanded.

These projects give students real world, practical experience that allows them to apply what they have learned in the classroom by working with actual businesses in a consulting capacity. They must complete an intensive project on a tight timeline, coordinating their efforts with the client, the professor and the SC SBDC consultant. Students have consistently cited how this experience has not only helped prepare them for future jobs, but how it has also been a factor in actually landing those positions.

SC SBDC client companies obtain targeted research and export business plans on global areas of interest. These services otherwise are unaffordable for most small to medium sized enterprises; and the student prepared business plans have been key to helping them build their international trade strategies.

It is programs like this that help equip our youth to handle responsible jobs while also helping to create real economic impact for our communities.

Sincerely,



Michele D. Abraham  
State Director  
South Carolina Small Business Development Centers

### **Section 3**

#### Other Narrative Attachment Form

- Mandatory Activities
- Competitive Preference Priorities
- Invitational Priorities
- Global Exchange Partners
- Letters of MSI Consortium/Collaboration Support
  - Duke University
  - North Carolina Central University
  - Saint Augustine's University
  - Johnson C. Smith University
  - South Carolina State University
  - Allen University
  - North Carolina A&T State University
  - Clayton State University
  - Nine University and College International Studies Consortium of Georgia

**Meeting the Purpose of the Authorizing Statute  
Mandatory Activities**

This table conveys the USC CIBE activities that meet the mandatory activities for CIBEs, as defined in Title VI of the Higher Education Act.

- (a) *interdisciplinary programs which incorporate foreign language and international studies training into business, finance, management communications systems, and other professional curricular;*

<b>Graduate 1:</b>	<b>CIBE will support the development and growth of the Master of International Business (MIB) program</b>
<b>Graduate 2:</b>	<b>The Moore School will continue to offer the IMBA program</b>
<b>Graduate 3:</b>	<b>CIBE will support the development of a Russian language track within the IMBA Program</b>
<b>Graduate 4:</b>	<b>CIBE will support the development of an IMBA dual degree program with EGADE Business School, Technologico de Monterrey</b>
<b>Graduate 5:</b>	<b>CIBE will support the design and implementation of an IMBA course module focused on Cultural-Institutional Assessment</b>
<b>Graduate 8:</b>	<b>CIBE will support the development of a MBA dual degree program with the University of New South Wales, Australian School of Business</b>
<b>Graduate 9:</b>	<b>CIBE will support an International Business Certificate for the Professional MBA</b>
<b>PhD 1:</b>	<b>CIBE will support the development of dual degree Doctoral Programs in International Business</b>
<b>Undergraduate 1:</b>	<b>Moore School will continue to offer the International Business and Chinese Enterprise (IBCE) Cohort Program</b>
<b>Undergraduate 2:</b>	<b>CIBE will develop cohort programs modeled after the IBCE program, in the critical languages of Arabic (American University in Cairo) and Portuguese (Brazilian partner to be determined). CIBE will develop cohort programs in other foreign languages: French (Université Paris-Dauphine), German (University of Mannheim) and Spanish (Universidad de Chile).</b>

- (b) *interdisciplinary programs which provide business, finance, management, communications systems, and other professional training for foreign language and international studies faculty and advance degree candidates;*

<b>Outreach 9:</b>	<b>CIBE will conduct a Workshop on Teaching Spanish for International Business for Professors of Spanish</b>
<b>Outreach 11:</b>	<b>CIBE will participate in the CIBE Business Language Conference Consortium</b>

**Meeting the Purpose of the Authorizing Statute  
Mandatory Activities (continued)**

(c) *programs, such as intensive language programs, available to members of the business community and other professionals which are designed to develop or enhance their international skills, awareness, and expertise;*

- Graduate 9:** CIBE will support an International Business Certificate for the Professional MBA (PMBA), through the development of additional short-term study abroad (STSA) opportunities for working professionals
- Business 1:** CIBE will develop and sponsor an ongoing program of Comparative Institutional Analysis of Regional/SC Clusters and Economic Development
- Business 2:** CIBE will support the development of the Export-Market Entry Studies Initiative
- Business 3:** The Moore School will continue to offer open enrollment and customized firm-specific executive programs in International Business
- Outreach 2:** CIBE will organize and host an Annual International Business Research Conference focused on Comparative Institutions and Governance Research
- Outreach 3:** CIBE will organize and host a Culture and Finance Conference in collaboration with the *Journal of Corporate Finance*
- Outreach 4:** CIBE will deliver five different Faculty Development in International Business (FDIB) Programs
- Outreach 5:** Development of new FDIB program courses
- Outreach 6:** CIBE will offer a FDIB – Sub-Saharan Africa program
- Outreach 7:** CIBE will co-lead a new FDIB – MENA program focusing on the Middle East and North Africa
- Outreach 8:** CIBE will co-sponsor the FDIB – China/Hong Kong program
- Outreach 10:** CIBE will sponsor and further develop the USC Summer Language Institute (SLI)

**Meeting the Purpose of the Authorizing Statue  
Mandatory Activities (continued)**

- (d) *collaborative programs, activities, or research involving other institutions of higher education, local educational agencies, professional associations, businesses, firms or combinations thereof, to promote the development of international skills, awareness, and expertise among current and prospective members of the business community and other professionals;*

- Graduate 2:**                    **Continue IMBA - International Internship Requirement**
- Business 1:**                    **CIBE will develop and sponsor an ongoing program of Comparative Institutional Analysis of Regional/SC Clusters and Economic Development**
- Business 2:**                    **CIBE will support the development of the Export-Market Entry Studies Initiative**
- Outreach 1:**                    **CIBE will develop and support an Internationalization Initiative for Minority Serving Institution (MSI) partners**
- Outreach 5:**                    **Development of New FDIB program courses**
- Outreach 6:**                    **CIBE will offer a FDIB – Sub-Saharan Africa program**
- Outreach 7:**                    **CIBE will co-lead a new FDIB – MENA program focusing on the Middle East and North Africa**
- Outreach 8:**                    **CIBE will co-sponsor the FDIB – China/Hong Kong program**

- (e) *research designed to strengthen and improve the international aspects of business and professional education and to promote integrated curricula; and*

- Graduate 5:**                    **CIBE will support the design and implementation of an IMBA course module focused on Cultural-Institutional Assessment**
- Business 1:**                    **CIBE will develop and sponsor an ongoing program of Comparative Institutional Analysis of Regional/SC Clusters and Economic Development**
- Outreach 2:**                    **CIBE will organize and host an Annual International Business Research Conference focused on Comparative Institutions and Governance Research**
- Outreach 11:**                    **CIBE will participate in the CIBE Business Language Conference Consortium**
- Outreach 12:**                    **CIBE will continue its membership in the Consortium for Undergraduate International Business Education and Global Business School Network**

**Meeting the Purpose of the Authorizing Statute  
Mandatory Activities (continued)**

(f) *research designed to promote the international competitiveness of American businesses and firms, including those not currently active in international trade.*

- Business 1:** CIBE will develop and sponsor an ongoing program of Comparative Institutional Analysis of Regional/SC Clusters and Economic Development
- Outreach 2:** CIBE will organize and host an Annual International Business Research Conference focused on Comparative Institutions and Governance Research
- Outreach 3:** CIBE will organize and host a Culture and Finance Conference in collaboration with the *Journal of Corporate Finance*
- Research 1:** State-Owned Enterprises and Private Benefits of Control: A Cross-National Extension of Principal-Principal Agency Theory
- Research 2:** Family Firms: Key Determinants of Prevalence, Strategy and Profitability
- Research 3:** Family Control and Corporate Social Responsibility: Evidence from East Asia
- Research 4:** Business Groups and Socioeconomic Outcomes
- Research 5:** Industry Clusters and Firm Strategy
- Research 6:** Clusters: The Case of China and Impact on Global Competition
- Research 7:** Local Innovation for Competing in Global Markets
- Research 8:** Transnational Regulatory Integration and Development
- Research 9:** Stakeholder Engagement in the Extractives Industry
- Research 10:** Chinese Investment in Africa
- Research 11:** Social Innovations Targeting Actors at the Bottom of the Pyramid-The Case of Mobile Money
- Research 12:** Institutional Factors Affecting Diffusion of Mobile Money and Mobile Health across Sub-Saharan Africa
- Research 13:** CIBE Scholars

## **Meeting the Purpose of the Authorizing Statue Competitive Preference Priority 1**

*Propose collaborations with one or more professional associations and/or businesses on activities designed to expand employment opportunities for international business students, such as internships and work-study opportunities.*

The USC CIBE collaborates with a significant number of businesses as all of our International MBA students are required to have a 5-6 month internship abroad, working for a multinational corporation (**Graduate 2**). Furthermore, for our MIB, the dual degree program with Bocconi will require a 5-month internship and the dual degree with ESCP requires a 39-week internship (**Graduate 1**). These internships often lead to full time employment opportunities.

Our major business outreach initiative (**Business 1, 2.2 Significance**) is in collaboration with two professional associations (SC Department of Commerce, New Carolina-SC Council on Competitiveness) and will have international business students working on teams comprised of faculty, executives and policy officials. We are collaborating with Small Business Development Center (SBDC) (**Business 2**) where international business students conduct market entry studies for SBDC clients. CIBE collaborations that will expand employment opportunities for international business students include:

- |                        |   |
|------------------------|---|
| <b>Graduate 1</b>      | <b>Internship Requirement for MIB Dual Degree Programs with Bocconi and ESCP</b>  |
| <b>Graduate 2</b>      | <b>Continue IMBA - International Internship Requirement</b>   |
| <b>Graduate 3</b>      | <b>Internship Requirement for IMBA Russian Track</b>  |
| <b>Graduate 4</b>      | <b>Internship Requirement for IMBA Dual Degree with EGADE</b>   |
| <b>Graduate 7</b>      | <b>Collaboration with IBM for Text Analytics Training for IMBA students</b>   |
| <b>Graduate 9</b>      | <b>Collaboration with Global Exchange Partners for STSA Programs Leading to an International Business Certificate</b>                                   |
| <b>Undergraduate 5</b> | <b>Collaboration with Businesses as Participants in the International Business Career Day</b>   |
| <b>Undergraduate 6</b> | <b>Collaboration with Businesses as part of the Corporate Board for IB/Finance Majors and the Corporate Board for IB/marketing Majors</b>               |
| <b>Undergraduate 7</b> | <b>Collaboration with Businesses to Support Functional-focused STSA Programs</b>  |
| <b>Business 1:</b>     | <b>Comparative Institutional Analysis of Regional/SC Clusters and Economic Development – Collaboration with SC Department of Commerce, New Carolina</b> |
| <b>Business 2:</b>     | <b>Export-Market Entry Studies Initiative in Collaboration with SBDC</b>  |

**Meeting the Purpose of the Authorizing Statute  
Competitive Preference Priority 2**

*Propose significant and sustained collaborative activities with one or more Minority-Serving Institutions (MSIs) and/or community colleges. These activities must be designed to incorporate international, intercultural, and global dimensions into the business curriculum of the MSIs and/or community colleges.*

We have designed a comprehensive internationalization process (**Outreach 1**) that will directly assist faculty to incorporate international dimensions into existing courses, develop international-specific courses, experience or develop experiential international courses (e.g. short term study abroad courses) and become engaged in international scholarship. CIBE and the Moore School faculty have longstanding expertise in each of these faculty development activities. The USC CIBE has arranged a collaboration of 19 MSIs that will participate in this initiative (see attached MSI letters of collaboration and support). Beyond the **Outreach 1** initiative, underrepresented schools are highlighted as priority for funding support to participate in the following activities:

- Undergraduate 7    Undergraduate Short Term Study Abroad Program**
- Outreach 4            Faculty Development in International Business Programs**
- Outreach 6            FDIB program to Sub-Saharan Africa**
- Outreach 7            FDIB program to MENA**
- Outreach 8            FDIB program to China/Hong Kong**
- Outreach 9            Workshop on *Teaching Spanish for International Business* for Professors of Spanish**
- Outreach 10            USC Summer Language Institute**
- Outreach 11            CIBE Business Language Conference**
- Research 13            CIBE Scholars – Competitive Research Awards**

Minority Serving Institutions (MSIs) collaborating with the USC CIBE Initiative:

Georgia

- |  |   |
|--|---|
| Clayton State University, Morrow             | Georgia Gwinnett College, Lawrenceville               |
| Abraham Baldwin Agricultural College, Tifton | Georgia Highlands College, Rome/Cartersville/Marietta |
| Albany State University, Albany              | Georgia Perimeter College, Decatur                    |
| Bainbridge College, Bainbridge               | Georgia Southwestern State University, Americus       |
| Columbus State University, Columbus          | Middle Georgia State College,                         |
| Dalton State College, Dalton                 | Macon/Cochran/Dublin/Warner Robbins                   |
| Fort Valley State University, Fort Valley    |   |

South Carolina

- |                            |                                  |
|----------------------------|----------------------------------|
| Allen University, Columbia | South Carolina State, Orangeburg |
|----------------------------|----------------------------------|

North Carolina

- |   |  |
|---|--|
| North Carolina Central University, Durham | Johnson C. Smith University, Charlotte |
| Saint Augustine's University, Raleigh     | Livingston College, Salisbury          |
| North Carolina A&T University, Greensboro |  |

**Meeting the Purpose of the Authorizing Statute  
Invitational Priority 1**

*Propose programs or activities focused on language instruction and/or performance testing and assessment to strengthen the preparation of international business professionals.*

USC CIBE will engage in a wide range of activities to support both language instruction and assessment of international business professionals. Our most significant initiative is the development of language-focused cohort programs (**Undergraduate 1; Undergraduate 2; Significance of the Program 2.1**). The cohort programs are structured to provide extensive language instruction and time in country, with the objective of developing full professional proficiency. CIBE will support cohort programs in Mandarin, Arabic, Portuguese, French, German and Spanish. Proposed CIBE programs and activities are:

<b>Graduate 2</b>	<b>International MBA Program with Language Tracks in Arabic, Chinese, Japanese, French, German, Italian, Portuguese, and Spanish</b>
<b>Graduate 3</b>	<b>International MBA Russian Track</b>
<b>Graduate 4</b>	<b>Dual Degree MBA Program with EGADE Business School, TEC de Monterrey</b>
<b>Graduate 6</b>	<b>IMBA Language Assessment Procedures</b>
<b>Undergraduate 1</b>	<b>IBCE (Chinese) Cohort Program</b>
<b>Undergraduate 2</b>	<b>Language Cohort Programs in Arabic, Portuguese, French, German and Spanish</b>
<b>Undergraduate 4</b>	<b>International Business Language Assessment Procedures</b>
<b>Outreach 9</b>	<b>Workshop on <i>Teaching Spanish for International Business</i> for Professors of Spanish</b>
<b>Outreach 10</b>	<b>USC Summer Language Institute</b>
<b>Outreach 11</b>	<b>CIBE Business Language Conference Consortium</b>

**Meeting the Purpose of the Authorizing Statute  
Invitational Priority 2**

*Propose collaborative activities and partnerships with institutions in Sub-Saharan Africa, South Asia, or Southeast Asia.*

A central theme of CIBE will be our continuing development of programs and research activities linked to the continent of Africa, both North Africa and Sub-Saharan Africa. Our activities in Sub-Saharan Africa are discussed in **Section 2.4. Significance: The Africa Initiative** and in **Research 3.3 Theme 3: Managing Global Political Risk and Legitimacy of MNCs - Africa Focus**. For the FDIB Sub-Saharan and MENA Programs we partner with the following institutions:

South Africa:

Centre for Entrepreneurship, University of Witwatersrand (Wits), Johannesburg  
Centre for Inclusive Banking in Africa, University of Pretoria, Tshwane  
Centre for Chinese Studies, Stellenbosch University, Stellenbosch

Kenya:

Utalii College (Hospitality Management), Nairobi  
Strathmore Business School, Strathmore University, Nairobi

Zambia:

School of Mines, University of Zambia, Lusaka

Morocco:

Ecole de Management (ESCA), Casablanca  
Arabic Language Institute in Fez (ALIF), Fez

Egypt:

American University in Cairo, Cairo  
Al Diwan Arabic Language Center, Cairo

Tunisia:

Mediterranean School of Business, Southern Mediterranean University, Tunis

Collaborations to support CIBE research (**Research 3.3**) include:

Nigeria Liquefied Natural Gas  
Ghana Chamber of Mines  
Ghana Supply Chain Development  
Ghana Chamber of Oil and Gas  
University of South Africa  
Lagos Business School  
Pan-African University in Nigeria  
Ashesi University, Ghana

Collaborations (**Research 10**) and Partnerships (**Undergraduate 3, Significance of the Program 2.1**) in Southeast Asia include:

INSEAD-Singapore  
ESSEC-Singapore

## Darla Moore School of Business Global Exchange Partners

### Asia

- Yonsei Univ. – Seoul, S. Korea
- Fudan Univ. – Shanghai, China
- Shanghai Jiao Tong Univ. – Shanghai, China
- Tsinghua Univ. – Beijing, China
- Renmin University of China – Beijing, China
- Chinese University of Hong Kong – Hong Kong
- Hitotsubashi University – Tokyo, Japan
- Waseda University – Tokyo, Japan
- Keio University – Tokyo, Japan

### Europe

- ESSEC – Paris, France
- University Dauphine – Paris, France
- Kedge – Marseilles, France
- Univ. of Warwick – Coventry, England
- Univ. of Strathclyde – Glasgow, Scotland
- Erasmus University – Rotterdam, Netherlands
- Tilburg University – Tilburg, Netherlands
- Univ. of Mannheim – Mannheim, Germany
- Université Catholique de Louvain – Louvain-la-Neuve, Belgium
- WU Wien – Vienna, Austria
- Università Bocconi – Milan, Italy
- LUISS – Rome, Italy
- University of St. Gallen – St. Gallen, Switzerland
- Zurich University of Applied Sciences (ZHAW) – Zurich, Switzerland
- Jonkoping International Business School – Jonkoping, Sweden
- Aalto University School of Business – Helsinki, Finland
- Copenhagen Business School – Copenhagen, Denmark
- Univ. of Econ, Prague (VŠE) – Prague, Czech Republic
- Corvinus Univ. of Budapest – Budapest, Hungary
- CUNEF – Madrid, Spain
- IE – Madrid, Spain
- Univ. Carlos III de Madrid – Madrid, Spain
- Universidad de Navarra – Pamplona, Spain
- Koç University – Istanbul, Turkey

### Middle East and North Africa

- American University of Sharjah – Sharjah, UAE
- Hebrew University of Jerusalem – Jerusalem, Israel
- ESCA Ecole de Management – Casablanca, Morocco
- American University of Cairo – Cairo, Egypt *suspended*

### Latin America

- Universidad de Chile – Santiago, Chile
- Pontificia Universidad Católica de Chile – Santiago, Chile
- Universidad Torcuata di Tella – Buenos Aires, Argentina
- Fundação Getulio Vargas – Rio de Janeiro, Brazil
- Pontifical Catholic University of Rio de Janeiro – Rio de Janeiro, Brazil
- Tecnológico de Monterrey – Guadalajara, Mexico
- Universidad ORT Uruguay – Montevideo, Uruguay
- Pontificia Universidad Católica del Perú (PUCP) – Lima, Peru



Lucy J. Reuben, PhD  
Professor of the Practice of Business Administration

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Fax +1.919.681-6244  
[www.fuqua.duke.edu](http://www.fuqua.duke.edu)  
[lucy.reuben@duke.edu](mailto:lucy.reuben@duke.edu)

June 24, 2014

Dr. Kendall Roth  
Senior Associate Dean,  
International Programs and Partnerships  
Darla Moore School of Business  
University of South Carolina  
Columbia, South Carolina 29208

Dear Dr. Roth:

This letter confirms my willingness and availability to work with the University of South Carolina's Center for Business Education & Research for enhanced outreach to Minority Serving Institutions (MSIs), since Duke University's Fuqua School will cease hosting its CIBER later this year.

On April 3, 2014, I was pleased to meet with Dr. Tatiana Kostova, Chair and Professor of International Business, and you to discuss your goals of providing assistance to a wider range of MSIs which seek help in the internationalization of their curriculum offerings. In that regard, it is my pleasure to provide expertise in partnership engagements across diverse colleges and universities. Specifically, for this proposal I have obtained written commitments from three HBCUs in North Carolina and South Carolina, while two other HBCUs have expressed interest pending completion of their respective on-campus approval processes. Furthermore, additional outreach to MSIs (HBCUs and HSIs) is afforded through the PhD Pipeline Opportunity Program ([www.phdpipeline.org](http://www.phdpipeline.org)), for which I serve as Director. With my background and experience as a faculty member in various MSI and non-MSI institutions, I offer assistance in developing and sustaining productive partnerships among diverse colleges and universities.

I have included letters of intent to participate from three HBCUs:

1. North Carolina Central University  
Durham, N.C
2. Saint Augustine University  
Raleigh, NC
3. South Carolina State University  
Orangeburg, SC

In addition, I have received verbal expressions of interest from other HBCU faculty, including faculty from

1. Johnson C. Smith University  
Charlotte, NC

2. Livingstone College  
Salisbury, NC

Finally, the PhD Pipeline Opportunity Program involves 17 colleges and universities, including the following MSIs:

1. Allen University
2. Clark Atlanta University
3. Cheyney University of Pennsylvania
4. Florida International University
5. Johnson C. Smith University
6. Hampton University
7. Morgan State University
8. North Carolina A&T State University
9. Oakwood University
10. South Carolina State University
11. Tuskegee University

Presently, Duke University provides outreach services to these institutions through the PhD Pipeline Opportunity Program events and activities. With the elimination of the Duke CIBER, the PhD Pipeline Opportunity Program intends to seek partnership with the USC CIBER to provide needed assistance for these MSIs to more effectively internationalize their curricular offerings.

These historically under-resourced MSIs would significantly benefit from the expertise of USC's Darla Moore School of Business to better prepare their students for the global economy in which they must work and exhibit civic leadership. We are grateful to your colleagues for your willingness to provide very important outreach services to the MSIs. Please do not hesitate to contact me if you have any questions or need additional information ([lucy.reuben@duke.edu](mailto:lucy.reuben@duke.edu) or 919.660.7661)

Sincerely,



Lucy J. Reuben, PhD  
Director, PhD Pipeline Opportunity Program  
Professor of the Practice of Business Administration



James E. Shepard, Founder

Office of the Dean  
School of Business

June 24, 2014

Lucy J. Reuben, PhD  
Professor of the Practice of Business Administration  
Duke University  
The Fuqua School of Business  
100 Fuqua Drive, Box 90120  
Durham, NC 27708-0120

Dear Professor Reuben:

On behalf of the School of Business at North Carolina Central University (NCCU), I am pleased to support the CIBER proposal submitted by the Darla Moore School of Business at the University of South Carolina. As one of only five state-supported Historically Black Universities in North Carolina, and the first public HBCU founded with a liberal arts focus, we are particularly proud to be associated with a project that increases the competencies of MSIs with respect to globalization. In 2013, the School of Business faculty at NCCU endorsed specific strategic goals to increase globalization opportunities for students and faculty. USC's proposal provides an essential resource for ensuring the overall success of the initiatives we have specified, and we welcome the opportunity to participate in this partnership.

The proposal's progressive approach with respect to faculty development, course development, and significant student engagement in study/work abroad opportunities is one that we fully embrace. Faculty involvement is essential for student engagement, and the processes for supporting faculty and course development through personal mentoring is greatly valued.

If there is any thing I can do to further facilitate the success of this initiative, please feel free to contact me. I look forward to working together with you and your team.

Sincerely,

Dr. Wanda Lester  
Interim Dean, School of Business  
WFL/ndg



June 23, 2014

Dear Dr. Reuben,

We are excited about the opportunity to work with you, Duke University and the University of South Carolina's Center for International Education & Research (CIBER) as part of the outreach to MSIs in GA, SC and NC to participate in the NC MSI consortium. We look forward to improving internationalizing our curriculum at Saint Augustine's University's campus as part of our Quality Enhancement Program (QEP) and participating in study and research opportunities about other cultures.

The focus of our QEP is global learning and this is a natural fit. As part of our QEP we have engaged in campus wide efforts both inside and outside the classroom to begin the process of internationalizing our campus. Additionally we are excited to grow our international business education programs and courses, lead study abroad programs, and increase our overall faculty expertise in global and international education.

Thank you in advance for your consideration. Saint Augustine's University looks forward to being a part of this wonderful internationalization effort. If you need more information, please feel free to contact Mr. Russell G Brodie at 919-516-4366.

Thank you again.

Best Regards,

*B. Connie Allen* vbw

Dr B. Connie Allen, Provost  
Saint Augustine's University



# JOHNSON C. SMITH UNIVERSITY

Lucy J. Reuben, Ph.D.  
Professor of the Practice of Business Administration  
Duke University  
The Fuqua School of Business

Dear Dr. Reuben,

The Johnson C. Smith University Department of Business Administration and Economics has benefited greatly from information and exposure to international business through its connection to Duke University the University of Memphis- CIBER Program. Through the Memphis CIBER workshops, the faculty members have gained knowledge in curriculum enhancement and network opportunities that are priceless. Each summer, the faculty members who attend the workshops, return with motivation and methodologies for cultivating and promoting the department's International Business Concentration.

Mike Evans, the new department chair, is very committed to developing the International Business Concentration and exposing out students to international travels and other related opportunities. The growing diversity within the University and particularly the department, are indicative of the University's global and international affairs goals.

Dr. Reuben, please accept this letter of commitment to engage JCSU Department of Business Administration and Economics faculty members and students to the USC CIBER Program, if selected to be included.

Thank you again for considering Johnson C. Smith University in such a noteworthy initiative.

Respectfully,



Helen Taylor Caldwell, Ph.D.  
Dean, College of Professional Studies  
Johnson C. Smith University  
704.378.1014



Office of the Dean

| a new state of mind

## School of Business

Dr. Lucy Reuben  
Professor of the Practice of Business Administration  
Duke University  
The Fuqua School of Business  
100 Fuqua Drive  
Box 90120  
Durham, NC 27708-0120

RE: Participation in USC CIBER MSI Initiative

Dear Dr. Reuben,

This letter is in response to the University of South Carolina CIBER proposal to develop and support a Minority Serving Institution (MSI) Internationalization Initiative. The School of Business at South Carolina State University agrees to participate in this program as part of the Carolinas MSI consortium. Participation in this program will enable us to further our mission of preparing all business students to work in a global environment by internationalizing the business core curriculum and increasing faculty expertise in global and international education.

It is our understanding that “this initiative is designed to be implemented through a progressive specification of internationalization activities specific to each year of the funding period. It will incorporate faculty development programs, international business course development, faculty and student study abroad and overseas study opportunities and research paper development.”

Thank you for reaching out to South Carolina State University for this opportunity.

Sincerely,

Barbara L. Adams, Ph.D., CPA  
Interim Dean



June 26, 2014

Re: Letter of Support for USC CIBER and Allen University Partnership

We are pleased to support the application for the renewal of The University of South Carolina CIBER grant and welcome the opportunities related to the grant as the lead minority serving Institution. Allen University has successfully implemented other grants from NSF, NNSA and MSEIP among others.

As a minority serving institution we understand the imperative to promote U.S. competitiveness and to be a local and regional resource for ensuring that the U.S. is globally competitive.

Allen University, welcomes the opportunity to contribute to the body of knowledge in International business curricular, research, and outreach as proposed in the application. The impact of the partnership will help various stakeholders-Allen University's students and faculty, the State of South Carolina and the City of Columbia, S.C. to become more competitive in the global economy.

Allen University has adequate faculty and facilities for the research and outreach planned by the principal investigator. The Administration fully supports this endeavor and we believe that the USC – Allen CIBER partnership would contribute to the field in potentially significant ways. Dr. Flavia L. Eldemire, Chair – Division of Business and V.P. for Institutional Advancement will serve on the CIBER Advisory board.

If you have any further questions please do not hesitate to contact me at 803.255.5702 directly or by e-mail at [icole@allenuniversity.edu](mailto:icole@allenuniversity.edu). On behalf of Allen University, thank you for the collaborative CIBER opportunity.

Sincerely,

Lady June Cole  
Interim President



NORTH CAROLINA  
AGRICULTURAL AND TECHNICAL STATE UNIVERSITY

June 25, 2014

OFFICE OF THE DEAN  
SCHOOL OF  
BUSINESS AND ECONOMICS  
401 CRAIG HALL  
1601 E. MARKET STREET  
GREENSBORO, NC 27411

PHONE 336/334-7632  
FAX 336/334-7233

Dr. Lucy J. Reuben  
Professor of the Practice of Business Administration  
Duke University  
The Fuqua School of Business  
100 Fuqua Drive, Box 90120  
Durham, NC 27708-0120

Dear Dr. Reuben:

Please include North Carolina A&T State University in the proposal to the University of South Carolina's Center for International Education & Research (CIBER). The School of Business and Economics (SOBE) at North Carolina A&T State University is committed to providing opportunities to enhance global awareness and competence of our students and faculty. The SOBE Global Programs Resource Center focuses on increasing student learning experiences and expanding study abroad experiences through collaboration and partnerships with international institutions. However, we have a significant need for additional support and resources to take our globalization efforts to the next level. I am confident that our participation in the USC CIBER programs as part of the NC MSI consortium will make a significant impact.

During the 2013-2014 academic year, SOBE was involved in several international initiatives. In August 2013, Dr. Anyansi-Archibong played an integral part in planning the Global Opportunity (GO) Summit in which over 135 businesses from the Piedmont Region participated. During the Fall semester, Chancellor Martin and group of faculty, including Dr. Hong Wang from the Department of Management, traveled to Henan Polytechnic University (HPU) in Jiaozuo City, China, to strengthen our partnership with HPU in areas of faculty and student exchanges, research collaboration, and joint degree program offerings. In January 2014, seven SOBE faculty participated in a two-day workshop titled "Cultural Savvy" at UNC-Chapel Hill. And during Spring Break in March 2014, several SOBE students participated in a service learning trip through the University of Belize. Also during Spring Break, I traveled to Cyprus to negotiate a global partnership with the University of Nicosia with the intent of increasing the number of SOBE and A&T students who will study in Cyprus.

SOBE's participation as a member in the Center for International Business and Research (CIBER) Consortium provides opportunities for faculty development. This year, three SOBE faculty participated in curriculum development workshop on topics related to international business, international marketing, international supply chain, and international management. In the past three years, nine of our SOBE faculty have participated in these workshops.

Although we have taken significant steps to enhance our globalization efforts, there is much more to do. We have a significant need to support curricular development, extra-curricular activities, and faculty professional development. We are confident that with the support from the USC's CIBER grant proposal, we can more effectively advance global business education at A&T.

Sincerely,

Dr. Patrick R. Liverpool  
Interim Dean

EXPLORE  
DISCOVER  
BECOME



Office of Academic Affairs

June 12, 2014

Dr. Kendall Roth  
Senior Associate Dean - International Programs and  
Partnerships  
Darla Moore School of Business  
University of South Carolina  
Columbia, S. C. 29208

Dear Dr. Roth:

Greetings from Clayton State University of the University System of Georgia and headquarters of the Nine University and College International Studies Consortium of Georgia.

This has reference to my day long visit to your campus on December 16, 2013, and meeting with you and Dr. Tatiana Kostova, Chair and Professor of International Business, to request professional assistance from you, your program and staff to infuse international perspectives into our undergraduate business offerings thru faculty development workshops, study and travel abroad for students and teachers, opportunities for graduate study and applied research by our students.

In my capacity as the Director of the consortium, I am writing to seek your assistance both for Clayton State and a dozen other member institutions of our organization. Our Consortium represents a group of over 81,000 students and 2,000 faculty members. We are committed to the internationalization of undergraduate curriculum, as well as providing opportunities for faculty and students to experience and understand other cultures. Thus, I am pleased to collaborate with the University of South Carolina, Center for International Business Education, MSI partners in South Carolina and North Carolina, and other CIBERs in pursuing initiatives that further develop the international development of faculty and students among the Consortium partners. It is also appropriate to note here that diversity is our major strength. Two of our member schools, Fort Valley and Albany State universities are HBCUs (historically Black colleges and universities). A number of others including Clayton State enroll between 60 and 25% traditionally under represented students. We urgently need your help to

increase the knowledge, understanding and awareness of our students to issues pertaining to emerging markets and globalization.

Attached to this letter is a profile of our consortium. Looking forward to collaborating with you over the next couple of years. Please let me know if you need any additional information.

Thank you very much.

Sincerely,

A handwritten signature in black ink, appearing to read "Raj Sashti", with a long horizontal flourish extending to the right.

Raj Sashti - RajgopalSashti@clayton.edu

Director

International Education and Programs

Office of the Provost and Vice President for Academic  
Affairs

Director

Nine University and College International Studies Consortium of Georgia

Tel: 678-466-4092

[www.clayton.edu](http://www.clayton.edu)

## Nine University and College International Studies Consortium of Georgia

Raj Sashti, Director  
Office of the Provost & Vice President for Academic Affairs  
Clayton State University  
Morrow, Georgia 30260-0285  
Tel: 678-466-4092  
Fax: 770-960-4175  
rajgopalsashti@clayton.edu  
[www.clayton.edu](http://www.clayton.edu)

### Overview

Established in 1991, the Consortium consists of six universities and seven colleges of the University System of Georgia. Located about 15 miles from downtown Atlanta, Clayton State University (enrollment 7,200+), a university offering undergraduate and graduate programs in liberal arts and sciences, education, business and health, is the headquarters and lead institution of the consortium. (Information on other universities and colleges is included in the section immediately following the overview.) Over 80,000 students and more than 2000 faculty members teach in the dozen universities and colleges. The Consortium -- jointly funded by Clayton State, member institutions of the consortium, and other federal, state, and non-profit organizations -- is dedicated to developing, coordinating, and implementing international education and foreign language projects on behalf of the participating universities. During the past 24 years, Clayton State, Columbus State, Georgia Southwestern State universities,

### Objectives

The overall objectives of the Consortium extend through the range of international education including participant training, faculty exchange, and academic course work both in Georgia and overseas:

- Internationalize the undergraduate curriculum, foster perceptive visions of the world beyond narrow political boundaries, and enhance the ability of the students and faculty to function effectively in a global economy.
- On a regular basis, organize conferences and intercultural forums dealing with global issues and international development.

- Provide opportunities for faculty, in-service teachers, and students to study, travel, research and learn about different cultures.
- Facilitate exchange between colleges, students, and faculty, dignitaries and visitors of foreign countries in order to increase cross-cultural understanding.
- Promote the cause of peace and international communication through educational and cultural exchange programs.
- Build an international studies resource center consisting of books, journals, multi-media materials, and artifacts to be shared among participating institutions.

### **Accomplishments**

Since its inception, the Consortium has developed and implemented the following:

- faculty and curriculum development seminars in East and South East Asia, Eastern Europe and former Soviet Union, Africa, the Middle East and Latin America;
- a visiting professor program;
- lectures and distinguished scholars programs;
- student and faculty study and travel abroad activities;
- a curriculum development resource center;
- academic linkages with overseas universities and colleges;
- the development of new courses;
- instruction in selected uncommonly taught languages;
- nearly two dozen faculty development/curriculum enrichment workshops in international studies and foreign languages;
- pro-active linkages with international business organizations;
- service to the community (specific details on these accomplishments are available on request).

## **Organization**

Headquartered at Clayton State University, the Consortium is headed by a director. The director and vice presidents for academic affairs of the participating universities and colleges meet once a year to discuss policy matters and provide overall direction to the organization. The day-to-day activities of the organization are managed by an Operating Council that is composed of two faculty members from each of the participating institutions. Members of the Operating Council are designated by the vice presidents for academic affairs and serve as liaisons between the Consortium and their institutions. The director and members of the Operating Council meet at the beginning of each fiscal year and on a quarterly basis to discuss, make decisions about, and vote on all programs.

## **Consortium Universities and Colleges**

- CLAYTON STATE UNIVERSITY, MORROW
- Abraham Baldwin Agricultural College, Tifton
- Albany State University, Albany
- Bainbridge College, Bainbridge
- Columbus State University, Columbus
- Dalton State College, Dalton
- Fort Valley State University, Fort Valley
- Georgia Gwinnett College, Lawrenceville
- Georgia Highlands College,  
Rome/Cartersville/Marietta
- Georgia Perimeter College, Decatur
- Georgia Southwestern State University, Americus
- Middle Georgia State College, Macon, Cochran, Dublin  
and Warner Robbins Campuses

## **Section 4**

### Other Narrative Attachment Form

- Meeting the Criteria on Significance and Project Design

## Meeting the Criteria on Significance and Project Design

Currently, the Darla Moore School of Business (DMSB) offers what is perhaps the most comprehensive set of international business specialty programs in the nation: Doctoral programs with international business and international finance majors; an International MBA (ranked #1, *US News & World Report*); a Master in International Business (MIB) that has two dual degree options with prominent partners abroad (ESCP-Paris, ranked #2 and University of Mannheim, ranked #16; Master in Management ranking, *Financial Times*); an undergraduate International Business Major (Ranked #1, *US News & World Report*); and a Mandarin specialization option in collaboration with Chinese University of Hong Kong (CUHK), with U.S. students studying in Hong Kong/China for approximately two years.

With the support of CIBE funding for 2014-2018, we will be able to further expand the opportunity for U.S. students studying at DMSB to develop expertise in international business, with options that will be truly unsurpassed in the world. It will help us implement the proposed new programmatic initiatives including an IMBA dual degree option with the #1 ranked MBA program in Latin America (EGADE Business School – Tec de Monterrey), four new dual degree options for the MIB program, planned with top universities in Italy (Bocconi University, ranked #17 Master in Management, *Financial Times*), Turkey (Koç University), China (tentative agreement with Shanghai Jiao Tong) and Spain (currently under review with IE-Madrid, ranked #1, Master in Management program, *Financial Times*), and seven new undergraduate cohort programs with partners in Chile (Facultad de Economía y Negocios - Universidad de Chile), France (Université Paris-Dauphine), Germany (University of Mannheim), Egypt (American University in Cairo), Brazil (TBD), Australia (University of New South Wales) and China (Chinese University of Hong Kong-Shenzhen).

These programmatic initiatives are motivated by our belief that to be successful, international managers must develop a deep understanding of the cultural and sociopolitical context within which their global operations reside. This belief has been foundational to the design of each program. With all proposed programs, graduate and undergraduate, students are required to study at a partner institution(s) for at least two full semesters. In addition, new course development includes a pioneering methodology for understanding cultural and institutional contexts from a comparative perspective. The curriculum design incorporates local partner expertise, particularly related to country and regional business practices. Thus, at the conclusion of the four-year CIBE

funding period, DMSB will be offering unparalleled educational opportunities for US students to build their international expertise in new and exciting ways.

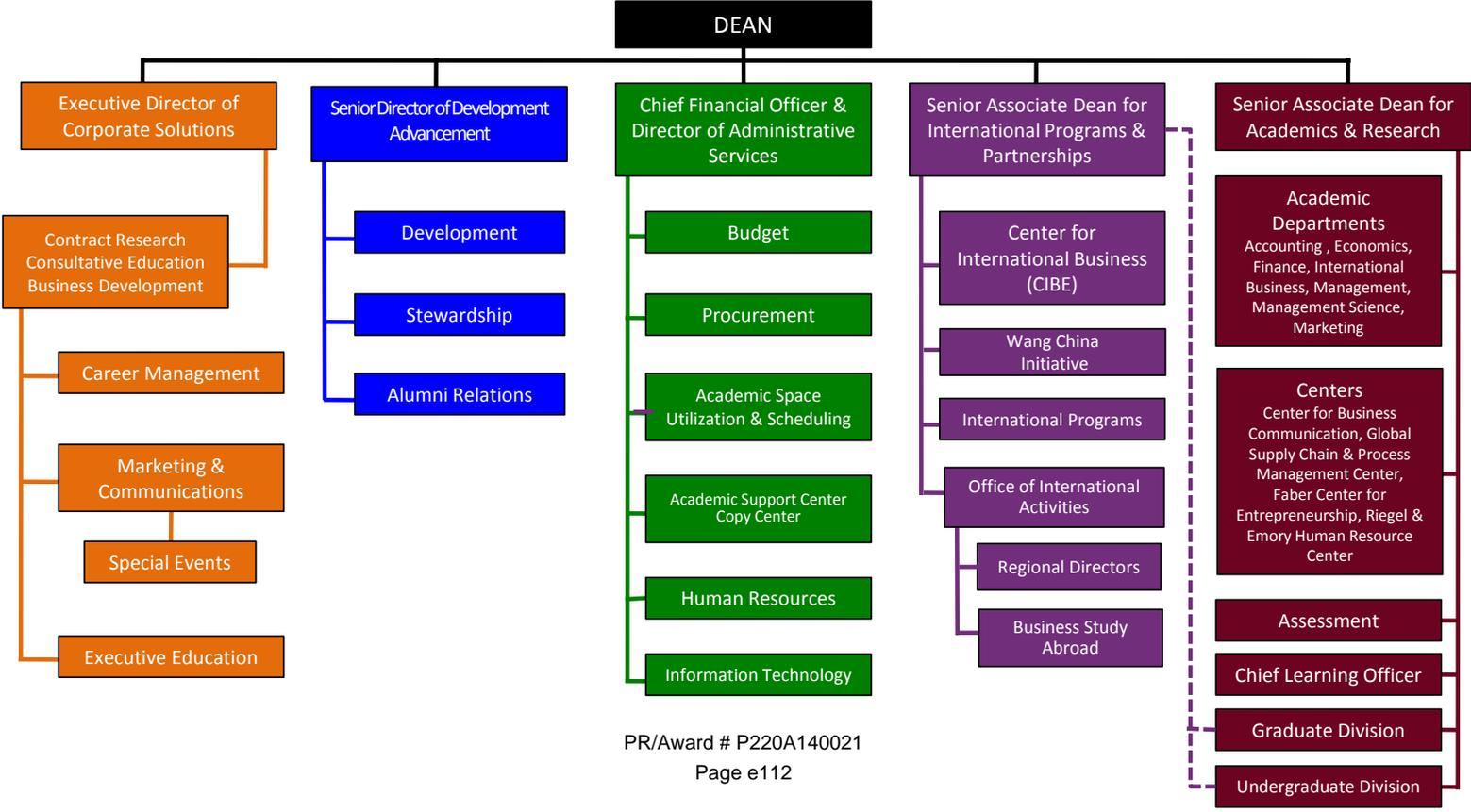
Our innovations in the programmatic area have been a direct result of the research agenda of the DMSB international business department. Based on recent studies, we have become convinced the world is increasingly characterized by “spiky” globalization and that understanding the organizational impact of crossing sociopolitical, cultural and economic borders is of increased importance to U.S. MNC success. In particular, the diverging proliferation of economic models throughout the world is systemic and enduring, and that understanding culture and local institutions are critical in determining how to effectively compete in these markets. Thus, our research agenda can be broadly characterized as “comparative institutionalism,” focusing on deeply contextualized studies whereby we create and disseminate knowledge on social, political and economic institutions around the world and their crucial importance for MNC performance. The vitality of this research agenda is fundamental to continued innovation in the design of our programs and faculty ability to excel in the classroom.

In summary, consistent with the CIBE Program Quality of the Project Design goal of a “coherent, sustained program of research and development in the field,” DMSB has brought together an exceptional group of multidisciplinary scholars who are experts in field research and contextualized studies. Through our curriculum innovations, we are linking this expertise to the classroom, providing our undergraduate and graduate students with deep contextualized understanding of business practices. Furthermore, we are partnering with leading educational institutions throughout the world, to contribute localized country/context specific knowledge into the classroom and provide students with significant opportunities for experiential learning through significant “time-in-country”. Our goal is to be the foremost national resource for the creation and dissemination of deep contextualized understanding of international business practice, which is also why we are proposing activities such as the Annual International Business Comparative Institutions and Governance Workshop and pedagogical developments such as the Cultural Institutional Assessment methodology. Finally, we aspire to have a significant contribution to U.S. competitiveness. Accordingly, our CIBE proposal includes a major emphasis on engaging with the business and policy communities, to conduct comparative industry cluster studies that will result in understanding the strategies and government policies necessary to effectively manage our regional clusters and thereby lead to improved global competitiveness of U.S. firms.

## **Section 5**

### Other Narrative Attachment Form

- Darla Moore School of Business Organizational Chart
- CIBE Project Management Plan



# CIBE PROJECT MANAGEMENT PLAN

## PROJECTS BY GRANT YEAR

	2014-15	2015-16	2016-17	
<b>1.3.1. MIB</b> MIB Dual Degree Programs	Launch Bocconi Dual Degree	Launch Koç Dual Degree	Launch Dual Degree (China Partner TBD)	
<b>1.3.2. IMBA</b> Russian Language Track	Negotiate Russian Track with HSE		Introduce Russian Track	
Dual Degree Program - EGADE	Develop MOU with EGADE		Launch IMBA/EGADE Dual Degree	Conti
Cultural-Institutional Course Module	Develop and Evaluate Methodology		Develop Manual & Materials	Mar
Language Assessment	Develop Assessment Procedures	Implement Language Assessment	Continue Language Assessment	
Text Analytics Training	Design Course Module	Implement Text Analytics Module	Continue Text Analytics Module & Assess	C
<b>1.3.3. One Year MBA</b> Dual Degree Program - UNSW	Develop MOU with UNSW	Launch MBA/UNSW Dual Degree	MBA/UNSW Dual Degree	
<b>1.3.4. PMBA</b> STSA Development	Develop & Launch One New STSA Course	Develop & Launch One New STSA Course	Develop & Launch One New STSA Course	C
<b>1.4. PhD</b> Dual Degree Programs	Identify PhD Dual Degree Partners	Develop Dual Degree MOUs	Launch PhD Dual Degree (Par	
<b>1.5.1. IBCE</b> Undergraduate Cohort Program	International Business and Chinese Enterprise (IBCE ) Undergraduate Cohort Program &			
<b>1.5.2. Undergrad Language</b> Arabic Cohort			Launch Arabic Language Cohort with AUC	Con
Portuguese Cohort	Identify Portuguese Language Partner	Develop Portuguese Language Cohort	Develop Portuguese Language Cohort MOU	Conti
French Cohort	Finalize MOU with Dauphine	Launch French Language Cohort with Dauphine	Continue French Language C	
German Cohort	Finalize MOU with Mannheim		Launch German Language Cohort with Mannheim	Con
Spanish Cohort	Launch Spanish Language Cohort with Univ. de Chile	Continue Spanish Language Cohort & Assess		
DMSB/UNSW/CUHK Cohort	Finalize MOU among Cohort Schools		Launch Multi-Country Cohort	C
DMSB/Mannheim/ESSEC/FGV Cohort	Finalize MOU among Cohort Schools	Launch Multi-Country Cohort	Continue Multi-Country Cohor	

### Legend

CIBE Funds	USC Matching Funds	CIBE & Matching Funds	Other USC Funds (Non-Matching Funds)	P
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## CIBE PROJECT MANAGEMENT PLAN (cont'd)

	PROJECTS BY GRANT YEAR			
	2014-15	2015-16	2016-17	
<b>1.5.3. IB Major</b> Language Assessment	Design & Develop Assessment Procedures	Implement Language Assessment Procedures		
IB Career Day	Plan, Coordinate and Conduct Annual International Business Career Day			
<b>1.5.4. Functional Majors</b> Department Corporate Board		Develop Marketing Department Board		Develop Finance De
STSA Programs	Introduce 2 New Programs	Introduce 2 New Programs	Introduce 2 New Programs	Int
<b>1.6.1. Outreach to Business</b> Industry Cluster and Economic Study	Industry Cluster 1 (Domestic)	Industry Cluster 1 (International)	Industry Cluster 1 (International)	
		Industry Cluster 2 (Domestic)	Industry Cluster 2 (International)	
			Industry Cluster 3 (Domestic)	
			Industry Cluster 4 (Domestic)	
Export Market Entry Studies	Client Studies	Client Studies	Client Studies	
<b>1.7. National Outreach</b> MSI Internationalization	2-Day FDIB & MSI Faculty Selection	Mentors / Develop Courses & STSA Programs	Mentors / Develop STSA Courses / 5-Day FDIB	Men Res
Annual IB Research Conference	Conduct Conference (Rotate Chair and Theme)	Conduct Conference (Rotate Chair and Theme)	Conduct Conference (Rotate Chair and Theme)	(R
Culture & Finance Conference	Conduct Conference (with <i>Journal of Corp. Finance</i> )			
FDIB Scholarship Assistance	Provide Scholarships for Annual FDIB Program	Provide Scholarships for Annual FDIB Program	Provide Scholarships for Annual FDIB Program	Pr A
FDIB Course Development	International Business Negotiations	Comparative Corporate Governance	Comparative Inst. Systems and Varieties of Capitalism	Isa
FDIB Sub-Saharan Africa Program	Lead Annual Program & Provide Scholarships	Lead Annual Program & Provide Scholarships	Lead Annual Program & Provide Scholarships	Le I
FDIB-MENA Program		Conduct Program in Final 3 Years of Grant Cycle & Provide Ou		
FDIB-China/Hong Kong Program	Sponsor One Participant	Sponsor One Participant	Sponsor One Participant	Sp
FDIB Spanish Workshop		Conduct Program in Final 3 Years of Grant Cycle & Provide Ou		

**Legend**

CIBE Funds	USC Matching Funds	CIBE & Matching Funds	Other USC Funds (Non-Matching Funds)	P
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# CIBE PROJECT MANAGEMENT PLAN (cont'd)

## PROJECTS BY GRANT YEAR

	2014-15	2015-16	2016-17	
<b>1.7. National Outreach</b> USC Summer Language Institute	Provide Annual Scholarships for Student Attendance & Support Other Language Of			
CIBE Business Language Conference	Provide Annual Support to Consortium + Travel Stipend and Program Fee Support to Outreach			
CUIBE & GBSN Membership	Membership Support	Membership Support	Membership Support	Membership Support
Magnet School Collaboration	Conduct Annual Faculty Workshop + Support Annual Ambassador Program for Middle & High Scho			
<b>3.1. Research Themes</b>	Research Theme 1: Corporate Governance, Institutions and Global Strategy			
Theme 1				
Theme 2	Research Theme 2: Industry Clusters, Innovation and Global Competitiveness			
Theme 3	Research Theme 3: Managing Global Political Risk and Legitimacy of MNCs - Africa Foc			
<b>3.4. Competitive IB Research</b> CIBE Scholars	Support Four Research Awards per Year	Support Four Research Awards per Year	Support Four Research Awards per Year	Support Four Research Awards per Year
<b>7. Project Evaluation</b> CIBE Evaluation	Conduct Assessment & Evaluation of all CIBE Projects and Activities over the Four-Year Grant			
External Evaluation				External Evaluation of All CIBER Projects & Activities

**Legend**

CIBE Funds	USC Matching Funds	CIBE & Matching Funds	Other USC Funds (Non-Matching Funds)	P
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## **Section 6**

### Other Narrative Attachment Form

- 40 Resumes

**NAME/TITLE:** Peter Brews, Professor and Dean, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Business Administration, University of Pittsburgh, 1995; Ph.D., Business Administration, University of Witwatersrand, South Africa, 1991; MSIA, Purdue University, 1987; LL.B., School of Law, University of Witwatersrand, 1982; B.Comm., University of Witwatersrand, 1977.

**PROFESSIONAL EXPERIENCE:** Dr. Brews has published in *Strategic Management Journal*, *Academy of Management Executive*, *Business Strategy Review*, *South African Journal of Business Management*, *South African Company Law Journal*, *The Investment Analysts' Journal*, *The Financial Times*, and other journals and publications. His early research centered on M&As and strategy formation and how environmental volatility affects firm planning and performance. More recently he pioneered research into Internet Generation Companies, and was among the first in the world (if not the first) to investigate how the Internet enabling of business operations was affecting the strategy, structure, scope, and performance of firms. He has also written or supervised over 20 cases in strategy, corporate finance, and most recently on international and Post Industrial business. Over the past decade he has developed a deep understanding of the struggle for productivity worldwide, focusing on how nations, firms, and individuals cope with the fast changing, complex, highly competitive global environment of the early 21st century. Companies often invite him to share his views on the structure and evolution of the global economy, and how globalization and the Internet/IT are altering business practice and corporate competitiveness. He has received awards for his research and scholarly work, and many outstanding teaching awards for his work in the classroom. He was also originator of the pioneering OneMBA® program, an Executive Global MBA offered by five leading business schools around the world.

---

**NAME/TITLE:** Nancy R. Buchan, Associate Professor, International Business and Faculty Director, Undergraduate International Business Major, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D, Marketing, University of Pennsylvania, 1998; M.A., International Administration, The Lauder Institute, University of Pennsylvania (Japanese Language Program, East Asian Specialist), 1996; B.A., International Relations and Economics, University of Wisconsin-Madison (Study Abroad Program – Sophia University, Tokyo, Japan, 1986-1988), 1989.

**PROFESSIONAL EXPERIENCE:** Dr. Buchan teaches International Negotiations, International Marketing and Business in Japan. In her first research stream, she applies an interdisciplinary approach to the study of norms such as fairness, trust, and cooperation in cross-cultural relationships. In the second stream, she investigates Communication and Social Interaction Styles (CSIS) across cultures. Her work has been published in the *Proceedings of the National Academy of Science*, the *American Economic Review*, the *American Journal of Sociology*, *Psychological Science*, the *Journal of Consumer Research*, the *Journal of International Business Studies*, and others. She served on the Editorial Board of the *Journal of International Business Studies and Organizational Behavior and Human Decision Processes*. Dr. Buchan has taught international negotiations and cross-cultural communications seminars for large (Fortune 100), mid-size and entrepreneurial companies as well as universities and not-for-profit organizations. Recent clients include *Westinghouse*, *Jarden Corporation*, *Blue Cross Blue Shield South Carolina*, the *World Council of Credit Unions and Upward Unlimited*. She is also a faculty member in the Executive International MBA program for which she offers classes at Monterrey de Technological and Mediterranean School of Business in Tunisia.

**NAME/TITLE:** Tim Carroll, Associate Dean, Executive Education and Director, Corporate Solutions, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Duke University, 2002.

**PROFESSIONAL EXPERIENCE:** Dr. Carroll's research centers on issues in organizational adaptation, organization design and competitive strategy. He is an award winning teacher, and has taught strategy, management, organization design, and organizational behavior at all levels – ranging from senior executives to doctoral, masters, and undergraduate students. He has provided consulting and executive education to companies in the aerospace, apparel, banking, computer, construction, energy, engineering services, media, mining, petroleum, pharmaceutical, railroad, restaurant, and telecom industries, as well as several government agencies. In these teaching and research activities he worked in over fifteen countries on five continents. Prior to receiving his Ph.D., Dr. Carroll consulted with McKinsey & Co., working with clients in the health care and technology industries to assess industry dynamics, develop strategies to compete more effectively, and design organizations to successfully implement their strategies. Prior to joining the Moore School faculty in 2006, he was on the faculty at the Georgia Institute of Technology.

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**NAME/TITLE:** Gabriele K. Clark, Director of Alumni Relations, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Master in International Business Studies (MIBS), University of South Carolina, 1996; B.S., Business Administration, Finance/Management, University of South Carolina, 1993.

**PROFESSIONAL EXPERIENCE:** Ms. Clark has been the Alumni Director since 2008 and previously served on the Board of Advisors of the Business Partnership Foundation of the Moore School of Business and was an active alumna volunteer wherever she lived. Prior to joining the Moore School, she spent 12 years working for PPG Industries -- a Fortune 200 chemicals company that manufactures coatings and special products. Ms. Clark began her career with PPG as an internal auditor and advanced through a series of finance positions in Birmingham, England; Paris, France; and Detroit, Michigan. She was then named Global Product Manager for automotive clear coat and was responsible for new product development and marketing. She transitioned to Mexico as Project Manager for automotive coatings to support a manufacturing facility in Mexico and one in Brazil. In her last role at PPG, she was the Global Director of Business Process Improvement in the Automotive Coatings business unit (\$2 billion annual sales at the time). In that role, she was responsible for leading change to a drive use of Lean and Six Sigma methodologies into all functional areas of the business to deliver improved business results. A native of Germany, Ms. Clark grew up in Spartanburg, South Carolina, and has also lived and worked in Belgium, the UK, France, Germany, and Mexico. She speaks English, German, French, and Spanish.

**NAME/TITLE:** Robert Henry Cox, Director, Walker Institute of International and Area Studies, and Professor and Chair, Department of Political Science, College of Arts and Sciences, University of South Carolina.

**EDUCATION:** Ph.D., Political Science, Indiana University, 1989; M.A., European Studies, Indiana University, 1988; B.Phil., Interdisciplinary Studies, Miami University, 1983.

**PROFESSIONAL EXPERIENCE:** Dr. Cox is Director of the Walker Institute of International and Area Studies and Chair of the Department of Political Science at the University of South Carolina. He has been a faculty member at the University of South Carolina since 2012. He teaches classes on European politics, comparative public policy and globalization. His research focuses on public policy in Europe, and the role of ideas in shaping political relations and policy outcomes. Much of his work has focused on European welfare states, especially how European countries have reformed welfare programs in recent years. His current work examines the politics of sustainability in Europe; specifically, how the European Union is encouraging renewable energy among its member states. His research has been published in major journals in comparative politics, such as *World Politics* and *Comparative Political Studies*. He is co-editor of *Governance*, one of the top-rated journals in the field of public administration.

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**NAME/TITLE:** Louis F. Dessau, Regional Director, Latin America, Denmark, Finland & Sweden, Office of International Activities, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** MBA, ESCP-Europe Paris, France (formerly EAP) 1990; B.S., Business Administration, Florida State University, 1980.

**PROFESSIONAL EXPERIENCE:** Mr. Dessau manages overseas graduate and undergraduate exchange agreements with institutions in Argentina, Brazil, Chile, Czech Republic, Denmark, Finland, Hungary, Mexico, Peru and Uruguay. When he joined Darla Moore School of Business, he was a lecturer and was extensively involved in the procurement and supervision of over 500 graduate internships in Latin America, Russia, France, Spain, and some of the African countries. He is also an adjunct professor of international business at Columbia College and has served on the Columbia College Business and Economics Department Advisory Board from 2006 to 2014. Prior employment was in the private sector, initially in financial reporting for construction and engineering projects of the oil and gas sector, followed by industrial sales and marketing positions based in Denmark and France. Louis is fluent in French, Spanish, and Danish, as well as operational in Portuguese.

**NAME/TITLE:** Timothy S. Douppnik, Professor, School of Accounting, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D. in Accounting, University of Illinois, 1983; M.S. in Accounting, University of Illinois, 1979; B.A. in Business Administration, California State University Fullerton, 1977.

**PROFESSIONAL EXPERIENCE:** Dr. Douppnik has been a faculty member at USC since 1982. He served as Director of the IMBA-Vienna program from 1991-1999, Director of the School of Accounting from 2003-2010, and as Vice Provost-International from 2010-2014. He teaches in the areas of financial accounting and international accounting, and has twice received the Alfred G. Smith Award for Excellence in Teaching (1985 and 2009). Dr. Douppnik conducts research in the area of international accounting, and he has published articles in numerous academic journals including *The Accounting Review*; *Accounting, Organizations, and Society*; *ABACUS*; *Journal of Accounting Literature*; *Journal of International Accounting Research*; *International Journal of Accounting*; *Journal of International Accounting, Auditing, and Taxation*; *Journal of International Business Studies*; and *Management International Review*. He was the editor of *Advances in International Accounting* from 1995-1997, associate editor of *Journal of International Accounting Research* from 2004-2007, and has served on the editorial board or reviewed for 15 other journals. He is the coauthor of two textbooks: *Advanced Accounting* and *International Accounting* both published by McGraw-Hill. Dr. Douppnik has been active in the American Accounting Association's International Section, serving as president in 1999-2000, and received the Section's Outstanding International Accounting Educator Award in 2008. He served on the Board of the European Accounting Association from 2010-2012. He has taught courses at the University of Marburg and University of Potsdam (Germany), Helsinki School of Economics (Finland), Xiamen University (China), and Escuela de Alta Direccion (Dominican Republic); and was a visiting researcher at University of São Paulo (Brazil).

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**NAME/TITLE:** Angel Earle, Regional Director, Office of International Activities, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Master of Business Administration, University of South Carolina (candidate, December 2014); M.Sc. in International Comparative Politics, London School of Economics, 2002; B.A., History and Politics, Honors College, University of South Carolina, 2000.

**PROFESSIONAL EXPERIENCE:** As the Regional Director for Europe at the Darla Moore School of Business, Angel is responsible for managing exchange agreements and international partnerships across Europe as well as the portfolio of double degree partners for the Master of International Business (MIB) program. Prior to joining the International Activities Office, she was the Director of Ph.D. Programs at the Moore School where she worked to recruit domestic and international doctoral students. Ms. Earle also worked previously at the South Carolina Department of Commerce as the Assistant Director of Research. She also worked in the financial and banking sector in London as a Certified Technical Analyst.

**NAME/TITLE:** Sara Easler, Director, Business Study Abroad, Office of International Activities, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** B.S., Journalism and Mass Communication, University of South Carolina, 2004.

**PROFESSIONAL EXPERIENCE:** Sara Easler has been with the University of South Carolina for nearly ten years and has served as the Director of Business Study Abroad in the Office of International Activities since March 2012. Her primary focus is in the development of faculty-led programming and study abroad for the graduate and undergraduate business student. Over the last five years, faculty-led initiatives have grown from two programs annually to nearly twenty. Additionally, Sara serves as the liaison to university academic committees for new program and degree progression through the faculty curriculum committee system. Prior to coming to the Moore School, Sara served as the administrative coordinator for the Perinatal Research Society in the School of Medicine at the University of South Carolina, coordinating annual conferences as well as national and international grant-writing. This international medical/scientific society's mission was to foster professional development and collaboration among its members in the area of Maternal-Fetal Medicine.

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**NAME/TITLE:** Flavia Eldemire, Associate Professor and Chair, Division of Business Administration, Allen University, Columbia, South Carolina.

**EDUCATION:** Ph.D., Business Administration, University of Massachusetts-Amherst; M.A., John Carroll University; B.S. and B.A., Roosevelt University, Chicago, Illinois.

**PROFESSIONAL EXPERIENCE:** Dr. Eldemire has held numerous consulting and faculty positions throughout the New England region. Her area of specialty is in leadership development, self-leadership, organizational development change management and has assisted numerous organizations, teams and individuals to bring about and to manage change effectively. She has been a staff consultant for The Levinson Institute, Boston, MA providing consulting services to executives and a senior consultant for The Galilee Agency, Inc. a Charlotte, N.C. based organizational development consulting firm. She has also worked with Resource Consultants Incorporated (RCI) in Vienna, Virginia where she has provided career transitional services for the Department of Defense. Dr. Eldemire is a certified consultant and test administrator for Emotional Intelligence, People Skills, Workplace Big Five-The Five Factor Model of Personality and Franklin Covey's The Seven Habits of Highly Effective People. She is a member of the Society for Human Resource Management, The Academy of Management, The American Psychological Association, The National Black MBA Association and The Society for Training and Development. Dr. Eldemire has taught management courses to undergraduates at Western New England College, Bentley University, Berklee College of Music, and Johnson & Wales University.

**NAME/TITLE:** Kenneth C. Erickson, Clinical Assistant Professor, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Anthropology, University of Kansas, 1995; M.A., Anthropology, University of Wyoming, 1985; B.A. *cum laude*, Anthropology, 1976.

**PROFESSIONAL EXPERIENCE:** Dr. Erickson is a business anthropologist and assistant clinical professor in the International Business Department at the Darla Moore School of Business, University of South Carolina. Erickson was *Profesor Agregado* in the Master's Program in Consumer Behavior at Adolfo Ibáñez University, Santiago, Chile; Lecturer in Anthropology at California State University-Long Beach and at Copper Mountain College; and Research Associate Professor of Anthropology at the University of Missouri-Kansas City. He is the CEO of Pacific Ethnography Company, and has led ethnographic research teams for business clients in China, Latin America, and the USA for Fortune 500 and government clients, studying people and their practices, including the goods they buy and sell, and the places where they live and work, to design new marketing plans, products, and public policies. Erickson's most recent publications include "Able to Fly: Temporality, Visibility, and the Disabled Airline Passenger" (Denny & Sunderland. Eds., Handbook of Anthropology in Business, 2014); and "Success Despite the Silos: System-Wide Innovation and Collaboration" (International Journal of Business Anthropology, forthcoming). His other publications have included refugees and immigrants, the meatpacking workplace, radio broadcasting and team ethnography. Erickson is a frequent presenter at applied anthropology conferences and at methodological training events focused on ethnography and anthropology for market research and design professionals. His efforts at Moore center on teaching an ethnographic toolkit to help international business students understand and act within local cultural systems of place, power and meaning. Erickson is a fluent speaker of Spanish, and a capable speaker of Mandarin, Swedish, and Vietnamese; he is a fellow of the American Anthropological Association and the Society for Applied Anthropology and a board member of Yokoji-Zen.

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**NAME/TITLE:** Mark Ferguson, Professor, Management Science Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Business Administration, Duke University, 2011; M.S., Industrial Engineering, Georgia Institute of Technology, 1994; B.S., Mechanical Engineering, Virginia Tech, 1991.

**PROFESSIONAL EXPERIENCE:** Dr. Mark Ferguson is a Distinguished Business Foundation Fellow and Professor of Management Science in the Darla Moore School of Business, University of South Carolina, where he serves as the Director of the Sustainable Enterprise and Development Initiative. Prior to joining the Moore School, he was the Steven Denning Professor of Technology and Management at Georgia Tech. Dr. Ferguson's research interests involve many areas of supply chain management including supply chain design for sustainable operations, contracts that improve overall supply chain efficiency, pricing and revenue management and the management of perishable products. Two of his papers have won best paper awards from the Production and Operations Management Society (POMS) and three of his research projects have been funded by the National Science Foundation. He is the co-author of the books *Segmentation, Revenue Management and Pricing Analytics*, *Pricing Segmentation and Analytics* and co-editor of the book: *Closed Loop Supply Chains: New Developments to Improve the Sustainability of Business Practices*. He currently serves as the president for the INFORMS Manufacturing and Services Operations Management Society. He was formerly the president for the INFORMS Revenue Management and Pricing Section and the president of the POMS College of Supply Chain Management. Prior to his career in academia, he spent five years as a manufacturing engineer and inventory manager with IBM.

**NAME/TITLE:** William R. Folks, Jr., Distinguished Professor *Emeritus*, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** DBA, Harvard, 1970; A.B. General Studies (Mathematics), Harvard, 1966.

**PROFESSIONAL EXPERIENCE:** Dr. Folks joined the University of South Carolina faculty in 1969. His primary area of teaching and research is international finance, and he is the author of over forty research papers, published in journals such as *Financial Management*, *Management Science*, the *Journal of Financial and Quantitative Analysis*, the *Journal of International Business Studies*, and the *Columbia Journal of World Business*, and is the co-author of the text *International Dimensions of Managerial Finance*. He is the coauthor of a major study on the impact of Statement of Financial Accounting Standards No. 8 on corporate exchange risk management practices of U.S. multinationals, commissioned by the Financial Accounting Standards Board. Professor Folks has served as a Visiting Professor at Universite Catholique de Louvain (BELGIUM), the Helsinki School of Economics and Business Administration (FINLAND), and Xiamen University (People's Republic of CHINA), has taught in numerous executive education programs in the United States, Brazil, Finland, and The United Arab Emirates. From 1976-1985, he served as the first Program Director of IB at USC, responsible for the development and growth of the nationally prominent academic programs in IB at the USC. Under his leadership, the Masters of International Business Studies (MIBS) program became recognized as the leading graduate program in IB in the world. In 1990, Professor Folks was appointed Director of the CIBE at USC. He has twice won the American Council of Education Task Force on the Reauthorization of Title VI and on the AACSB Task Force on the National Security Education Program. From 1994-1997, he served on the Council of Advisors to the National Security Education Program, DOD, and was the first President of the Association for International Business Education and Research (AIBER), the association of CIBER schools.

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**NAME/TITLE:** Marcelo Frias, Managing Director, Full-Time MBA programs, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** International Master of Business Administration (IMBA), University of South Carolina, 2005; B.A., International Business, Instituto Tecnológico y de Estudios Superiores de Monterrey, Mexico, 1997.

**PROFESSIONAL EXPERIENCE:** As a Managing Director for Full-Time MBA programs at the Darla Moore School of Business, Mr. Frias is responsible for key areas of full-time MBA programs including admissions and enrollment management, budgetary control, as well as program development and implementation of new initiatives. Prior to joining the Darla Moore School of Business, he worked as an international trader and marketing manager for a coffee and spices exporter headquartered in Ohio. Mr. Frias also worked previously in the metallurgic as well as citrus sector in Mexico in the areas of business analysis, customer service, and global logistics.

**NAME/TITLE:** T. Bruce Fryer, Distinguished Professor *Emeritus* of Spanish, College of Arts & Sciences, University of South Carolina.

**EDUCATION:** Ph.D., Foreign Language Education, The University of Texas-Austin, 1970; M.A., Spanish, Middlebury College, August 1966; B.A, Romance Languages, Muhlenberg College, 1962.

**PROFESSIONAL EXPERIENCE:** Professor Fryer served as Coordinator of the Spanish track of the Master's of International Business (MIBS) in which he taught since the program's inception in 1974 until 2003. He has taught Spanish language, applied linguistics, and culture at the elementary school, secondary school, undergraduate, and graduate levels. For twenty-two consecutive years, he directed Faculty Development in International Business (FDIB) workshops through the Center for International Business Education and Research (CIBER) at the University of South Carolina.. He has worked in the area of language for business and the professions in Colombia, Costa Rica, Mexico, Venezuela, Costa Rica, Spain, Puerto Rico, and Trinidad and Tobago. He is co-author or editor of twenty articles or chapters dealing with the preparation of teachers for the professions, appearing in the *Modern Language Journal*, *Hispania*, and *Foreign Language Annals*, and 15 books including *Spanish for the Business Traveler*, *Spanish and Portuguese for Business and the Professions*, a volume prepared for and sponsored by the American Association of Teachers of Spanish and Portuguese (AATSP), and *Exito Comercial: Prácticas administrativas y contextos comerciales*, 6th ed. (2015), a Spanish business language textbook and a workbook of Spanish business correspondence and documents now used in over 300 universities and agencies in seven countries. He serves on numerous editorial boards for business language instruction and has served as a consultant to universities planning to establish or develop language programs for special purposes. He currently teaches Spanish for International Business at USC-Beaufort.

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**NAME/TITLE:** Michael Galbreth, Associate Professor, Management Science Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Business Administration, Vanderbilt University, 2006; B.S., Business Administration, University of Tennessee, 1996.

**PROFESSIONAL EXPERIENCE:** Dr. Galbreth is an Associate Professor of Management Science. Prior to returning to academia, Dr. Galbreth was a manager in the Atlanta office of KPMG Consulting. He has taught in the undergraduate, MBA, and Ph.D. programs at the Moore School on topics including operations management, information systems, quantitative methods, and sustainable operations. He has also taught MBA courses at Vanderbilt University, Vienna University of Economics and Business, and Tecnológico de Monterrey in Guadalajara, Mexico. At the Moore School, Dr. Galbreth is a seven-time winner of the IMBA outstanding professor award (IMBA classes of 2007-2013) as well as the recipient of the Alfred G. Smith Award for Teaching Excellence in 2010. In 2013 he was runner-up for the Wickham Skinner Teaching Achievements Award from the Production & Operations Management Society, which recognizes pedagogical excellence from among all operations management professors globally. Dr. Galbreth's research activities are currently focused on sustainable operations, retail operations, and the interface between marketing and operations. In 2010 he was named a Fulbright Scholar and served as the Fulbright Enders Visiting Research Chair at McGill University in Montreal. Dr. Galbreth's research has appeared in many journals, to include *Management Science*, *Marketing Science*, *MIS Quarterly*, *Production and Operations Management*, *Interfaces*, *European Journal of Operational Research*, *Journal of Business Logistics* and others. He is a frequent referee for top academic journals, serving on the Editorial Review Boards of *Production and Operations Management* and *Journal of Business Logistics*. He is an Associate Editor of *Decision Sciences* and *Journal of Operations Management*.

**NAME/TITLE:** Omrane Guedhami, Associate Professor and Moore Research Fellow, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Finance, Laval University, 2003; M.Sc., Finance, HEC Montreal, University of Montreal, 1998.

**PROFESSIONAL EXPERIENCE:** Dr. Guedhami, a faculty member at the Moore School since 2007, also serves as the coordinator of the doctoral program in international business. Dr. Guedhami's research interests are international, covering privatization, liberalization, and corporate governance, with a particular focus on emerging markets. His research has been published in mainstream journals such as the *Journal of Financial Economics*, the *Journal of Accounting Research*, the *Journal of Accounting and Economics*, *Contemporary Accounting Research*, the *Journal of International Business Studies* and others. He currently is serving as an associate editor of *Asia-Pacific Journal of Financial Studies*, and is on the editorial board of *Journal of International Business Studies*, *Contemporary Accounting Research*, and the *Quarterly Review of Economics and Finance*. Dr. Guedhami received several research distinctions and awards, to include the Best Paper Award (China Goes Global Conference, Harvard Kennedy School). In 2011, he received the Rising Star Award from the Office of Research at the University of South Carolina. His research is funded by Canada's Social Sciences and Humanities Research Council. Dr. Guedhami taught at Laval University and Memorial University of Newfoundland before joining the Moore School of Business in 2007. He teaches financial management, investments, international corporate governance, and international finance at the undergraduate, graduate and doctoral levels. He was voted Finance Professor of the Year in 2005 and MIB Professor of the Year in 2013.

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**NAME/TITLE:** David Hudgens, Regional Director for the Asia Pacific Region, Office of International Activities, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** PhD, Faculty of Arts & Sciences, Cultural Anthropology Major with emphasis on Economic and Educational Anthropology, University of Pittsburgh, 2001; EdS, Counselor Education, University of South Carolina; Hopkins-Nanjing Program (HNC), School of Advanced International Studies (SAIS), Johns Hopkins University, 1995; M.A., Cultural Anthropology, University of Connecticut, 1991; B.S., Sociology, College of Charleston, 1987. Licensed Professional Counselor (LPC), 2013-Present.

**PROFESSIONAL EXPERIENCE:** Dr. Hudgens is the Regional Director for the Asia Pacific Region in the Office of International Activities at the Darla Moore School of Business. He joined the Moore School of Business in 1997. Dr. Hudgens previously served as Associate Director in the Undergraduate Studies Office and Associate Director of the International MBA Program at the Moore School of Business. He presently leads the coordination of activities for International Business programs in Asia, including the International Business and Chinese Enterprise program (IBCE). Since the early 1990s, Dr. Hudgens has focused on the relationship between economic development, international education and cultural change, primarily in institutional and corporate environments within the transitioning market economies of East Asia and Southeast Asia. A fluent speaker of Putonghua - Mandarin Chinese, his work addresses cross-cultural communication, values and social networks in formal and informal associations as they influence business, change and organizational development strategies. In addition to his work in the Moore School of Business, Dr. Hudgens teaches in the South Carolina Honors College at the University of South Carolina and has served on numerous fellowship and scholarship committees as well.

**NAME/TITLE:** Carolyn S. Jones, Assistant Dean, Undergraduate Business Studies, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., 1984 and M.A., 1979, University of South Carolina; B.S., University of Georgia.

**PROFESSIONAL EXPERIENCE:** Dr. Carolyn Jones is responsible for college-level administration and operation of the Undergraduate Division managing services for over 4,500 students. She began her career in the Atlanta public schools as a teacher. Dr. Jones has provided leadership for numerous student-centered activities including the Undergraduate Student Leadership Council, Emerging Leaders Program, the Case Competition Team, the Palmetto-Moore Research Team, the Conference for Careers in International Business, international conferences, internships, study abroad, service learning and social entrepreneurship opportunities. She initiated the Moore School of Business participation in a consortium of universities that facilitates study in Italy through the University of Iowa. Based on the Moore School's strong record in entrepreneurship, she has encouraged student involvement in the USC Incubator and also recruited and sponsored student participation in opportunities such as IdeaLab through the Otto Beisheim School of Management at WHU Koblenz. Dr. Jones has promoted cross-disciplinary collaboration and freshman cohort creation through the campus-wide linked courses initiative in partnership with USC Housing and the College of Arts and Sciences. Her activities include serving numerous times as Chair of the Assistant and Associate Dean's Council, member of the University's Carolina Core Committee, member of the Undergraduate Curriculum Committee, the Teaching Effectiveness Committee and member of the Carolina and McNair Scholars Review Committee. She was co-recipient of the Outstanding Freshman Advocate Award presented by the University and has been named an Ambassador of Global Learning. She has published papers and made presentations on topics related to academic advising, administration and service learning.

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**NAME/TITLE:** Brian Klaas, Senior Associate Dean for Research and Academics, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., University of Wisconsin-Madison, 1987; M.S., 1983, and B.S., 1981, Illinois State University.

**PROFESSIONAL EXPERIENCE:** Brian S. Klaas is Professor of Management and Senior Associate Dean for Research and Academics at the Darla Moore School of Business, University of South Carolina. He also serves as the Director of the Riegel & Emory Human Resource Center at the University of South Carolina. Professor Klaas teaches, conducts research, and consults in such areas as compensation, workplace dispute resolution, employee relations, and Human Resource outsourcing. He has published in such journals as *Personnel Psychology*, *Industrial Relations*, *Academy of Management Journal*, *Academy of Management Review*, *Industrial and Labor Relations Review*, *Journal of Management*, *Journal of Labor Research*, *Journal of Applied Psychology*, and *Human Resource Management*. His research has been funded by grants from the Upjohn Institute for Employment Research, the Riegel & Emory HR Center, and the Society of Human Resource Management, and the Gevity Institute.

**NAME/TITLE:** Tatiana Kostova, Buck Mickel Chair and Professor of International Business, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina

**EDUCATION:** Ph.D. Business Administration, University of Minnesota; M.S. and B.S. in Economic Cybernetics, Kiev State University, Ukraine; Fulbright Scholar, UCLA, 1988-89.

**PROFESSIONAL EXPERIENCE:** Dr. Kostova has taught international management courses in the IMBA, PMBA, and GMBA programs at USC; the IMBA European Program at WU, Vienna, Austria; the Executive IMBA program at Tech de Monterey, Guadalajara, Mexico; and in CEMS. She teaches in the FDIB Program at USC, helping faculty from other business schools develop international management courses. She is a regular guest professor in the Summer Program of CUHK and is actively involved in executive programs. She has won many teaching awards at the Moore School and other universities around the world. She was Fulbright Scholar at the University of California, Los Angeles and a Distinguished Fulbright Professor at WU, Vienna, Austria. Dr. Kostova's research interests are in the areas of international management, macro-organizational behavior, and organization theory. In 2007 she was recognized as the "Rising Star" in Economics & Business by Incites for the high impact of her publications. Professor Kostova's has published her research in top management and international business journals including *Academy of Management Review*, *Academy of Management Journal*, *Journal of International Business Studies*, *Journal of Management*, and many others. She has served as a Department Editor and member of the Editorial Board, and is currently a Consulting Editor, of *Journal of International Business Studies*. She is currently in her third term on the Editorial Board of *Academy of Management Review* and has also served or currently serves on the boards of *Academy of Management Journal*, *Journal of World Business*, *Multinational Business Review*, *Journal of Management Studies*, and *Journal of Asian Pacific Business*. She was VP of the Academy of International Business (AIB) and Chair of the International Management Division of the Academy of Management, and is a Fellow of AIB.

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**NAME/TITLE:** Chuck C.Y. Kwok, Charles W. Coker Sr. Distinguished Moore Fellow and Professor, Sonoco International Business Department, Darla Moore School of Business, Univ. of South Carolina.

**EDUCATION:** Ph.D., International Business, University of Texas at Austin, 1984; M. Phil., Sociology, Chinese University of Hong Kong, 1981; B. S. Sc. in Sociology, Chinese University of Hong Kong, 1979.

**PROFESSIONAL EXPERIENCE:** Since 1984, Dr. Kwok has taught international finance and China business courses at the graduate level at USC. He has been invited as a visiting professor at prestigious institutions around the world, including the Peking University, the Chinese University of Hong Kong, Shanghai Jaio Teng University, WU (Vienna) and the Monterrey Institute of Technology. In December 1999, he was awarded the honor of Guest Professorship by the Peking University, PRC. Kwok's research concentrates on international finance and international business education. He is one of the pioneers conducting interdisciplinary study on how national culture influences various financial practices around the world. He has published over fifty refereed journal articles as well as five books and monographs. He was ranked among the list of most prolific scholars contributing to the *Journal of International Business Studies* (the leading journal in international business). He received the prestigious Moskowitz Prize in 2011, given by the Center for Responsible Business, University of California, Berkeley. He has served on five journal editorial boards, including the *Journal of International Business Studies*. He also reviews articles for other journals such as the *American Economic Review*, *Journal of Banking and Finance*, *Financial Management*, *Journal of Financial Research*, *Pacific Basin Finance Journal*, *Canadian Journal of Administrative Science* and so forth. He was Vice President-Administration of the Academy of International Business for the two-year term of 1995 to 1996.

**NAME/TITLE:** Alice Leri, Lecturer, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D. candidate, Center for Culture Studies, Tilburg University, The Netherlands, expected 2014; M.A., Islamic Studies, Universita “L’Orientale” di Napoli, Italy, 2008. B.A., Intercultural Studies, Universita degli Studi di Firenze, Italy, 2005.

**PROFESSIONAL EXPERIENCE:** Alice Leri is a lecturer in the International Business department. She is in the last stage of her doctoral program in Culture Studies at Tilburg University where she enrolled in 2009. She started working at USC in 2014 and currently she is contributing to the IMBA program assisting students dealing with ethnographic research and cultural rich points. She is working on the creation of IMBA trackers-guides to help students to successfully manage their experience abroad and she just stated developing a similar guide for IMBA foreign students moving to Columbia. Together with the program coordinator, Professor Courtney Worsham, she helped lead a short-term study abroad Marketing and Communication class in May 2014 to Italy. With Professor Guedhami, she has prepared a syllabus for a new class in Islamic Economics and Finance; with Professor Erickson, she has assisted in preparing classes in Globalization and Halal Marketing and revising students projects and assignments. Her research interests focus on Turkish American and Turkic American associations, Turkish Islam, Halal marketing and Halal consumptionscapes. Her interests include discourse analysis and ethnography. Previously, Alice worked as translator and cultural mediator in the tourism industry, and she still collaborates with Sara Bassot writing self-help tales and comics for children and teenagers.

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**NAME/TITLE:** Sali Li, Associate Professor, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., International Business & Strategy, University of Utah, 2007; M.S., University of Kentucky, 2003; B.S., Dalian Maritime University, 2001.

**PROFESSIONAL EXPERIENCE:** Dr. Li joined the IB faculty at the Moore School in 2013. Previously, he was an Assistant Professor at the Lubar School of Business, University of Wisconsin-Milwaukee. He teaches global strategic management in the IMBA Program, and cross-cultural negotiation in the IB undergraduate and MIB programs. Professor Li’s primary research interests cover multinational strategy, revisiting the resource based view, and international entrepreneurship, with particular focus on emerging economies. Dr. Li’s research has been published in top tier academic journals, including the *Academy of Management Review*, *Strategic Management Journal*, *Journal of International Business Studies*, and *Journal of Management*. He currently is serving on the editorial board of the *Asia Pacific Journal of Management*, *Journal of International Management*, *Journal of Management*, and *Long Range Planning*. He is a reviewer for other journals, including: *Journal of International Business Studies* and *Strategic Management Journal*. Professionally, he is a member of the Academy of Management, Academy of International Business, International Association for Chinese Management Research and Strategic Management Society.

**NAME/TITLE:** Gerald A. McDermott, Associate Professor and BPF Moore Research Fellow, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Department of Political Science, Massachusetts Institute of Technology, 1998; B.A., Middlebury College, 1988.

**PROFESSIONAL EXPERIENCE:** Before joining the Moore School in 2008, Dr. McDermott was Assistant Professor of Multinational Management at the Wharton School of the University of Pennsylvania for seven years. He specializes in international business and institutional analysis, particularly on issues of governance, innovation, and corporate strategy in emerging market countries. His work in Latin America has examined the conditions under which societies build new innovative capacities that enable their industries to compete in global markets. He also studies the impact of transnational integration regimes on local institutional development via a comparison of the EU accession, NAFTA, and Mercosur. He has published articles in many of the leading scholarly journals in management, international business, and politics. His first book, *Embedded Politics: Industrial Networks and Institutional Change in Post-Communism* (University of Michigan Press, 2002), was a finalist for APSA's 2003 Woodrow Wilson Foundation Award for the Best Book on government, politics, and international affairs. His most recent book, with Laszlo Bruszt, is *Leveling the Playing Field: Transnational Regulatory Integration and Development* (Oxford University Press, forthcoming). He has received numerous awards and grants, and has also consulted for the multilateral lending institutions and the governments of the Czech Republic and Argentina. He lived in Prague for over 4 years and in Buenos Aires for over 6 years, being proficient in Czech and fluent in Spanish.

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**NAME/TITLE:** Paul Allen Miller, Vice Provost, Director of International Affairs, Carolina Distinguished Professor of Classics and Comparative Literature, University of South Carolina

**EDUCATION:** Ph.D., Comparative Literature, University of Texas at Austin, 1989; M. A., Classics, University of Texas at Austin, 1985; B.A. in Comparative Literature, Washington University, St Louis, 1982..

**PROFESSIONAL EXPERIENCE:** Dr. Miller has taught various Classics and Comparative Literature courses at both master and doctoral levels at the University of South Carolina since 1998. Before that he taught at Texas Tech University and Drury University. He has held visiting appointments at the University of the Ruhr (Bochum), the University of Paris 13, and Beijing Language and Cultural University. He currently oversees all international program at the University of South Carolina. . Dr Miller is the former editor of *Transactions of the American Philological Association*. He is the author of *Lyric Texts and Lyric Consciousness* (1994), *Latin Erotic Elegy* (2002), *Subjecting Verses* (2004), *Latin Verse Satire* (2005), *Postmodern Spiritual Practices* (2007), *Plato's Apology of Socrates* (2010) with Charles Platter, and *Atibullus Reader* (2013). He has edited fourteen volumes of essays on literary theory, gender studies, and topics in classics as well as published more than 60 articles on Latin, Greek, French, and English literature and philosophy. His *Diotima Among the Amazons: French Feminists Read Plato* is forthcoming from Oxford University Press.

**NAME/TITLE:** Michael Bruce Murphree, Assistant Professor, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., International Affairs, Science and Technology, Georgia Institute of Technology, 2014; M.S. in International Affairs, Georgia Institute of Technology, 2006; B.S. in International Affairs, Georgia Institute of Technology, 2004.

**PROFESSIONAL EXPERIENCE:** Dr. Murphree is a recent hire in the Darla Moore School of Business. He has taught Political Economy of Innovation in China and Introduction to International Political Economy as a Ph.D. candidate at Georgia Tech and will teach Globalization and International Business beginning in Fall 2014. Murphree has given invited lectures in the United States and China including at Tsinghua University, Jiaotong University, and Xiamen University. Professor Murphree's primary research interests include globalization, innovation in emerging economies, technology standards and market formation, and intellectual property rights. His research considers China in comparative perspective with other emerging economies and the developed West, particularly Europe. He has three years field research experience in China and speaks fluent Mandarin. Murphree has published four peer reviewed journal articles, as well as a book, a chapter in an edited volume and numerous commissioned reports. His book (co-authored with Dan Breznitz) – *The Run of the Red Queen: Government, Innovation, Globalization, and Economic Growth in China*, was published in 2011 and was the winner of the 2012 British International Studies Association Susan Strange Best Book Award and bronze medalist for the 2012 Axiom Business Book Award for International Business/Globalization.

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**NAME/TITLE:** Lite J. Nartey, Assistant Professor, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Managerial Science and Applied Economics, 2012 and M.Sc., University of Pennsylvania, 2008; M.P.A., Nonprofit Management and Policy, focus on International Development, New York University, 2004; B.Sc. (Hons), Biological Sciences, Kwame Nkrumah University of Science and Technology, Kumasi, Ghana, 2001.

**PROFESSIONAL EXPERIENCE:** Dr. Nartey has taught courses on Globalization and Business, and Global Stakeholder Management at both the undergraduate and master's levels at the University of South Carolina since 2011. Her research interests include exploring the relationships, contingencies, and dynamics among multinational firms, governments and civil society actors and the implications of these dynamics on both firm performance and societal value; stakeholder engagement and the business case for corporate social responsibility; extractive industries (specifically oil and mining); African business models (banking and telecommunications, with a focus on mobile money); and Chinese investment in Africa. Her work focuses largely on emerging economies, especially in Africa. Dr. Nartey's work has been recognized for several awards and nominations including Best Paper, Strategic Management Society Conference, 2013; Buckley & Casson Dissertation Award, 2013 (Academy of International Business); Second prize, Industry Studies Association Dissertation Award, 2012 (2<sup>nd</sup> prize); Finalist, Wiley Blackwell Award for Outstanding Dissertation Research in Business Policy and Strategy, 2013 (Academy of Management, Business Policy and Strategy Division); Finalist, Barry M. Richman Best Dissertation Award, 2013; Finalist, Emerald Best International Dissertation Award, 2013 and others. She was also nominated for the Haynes Prize for the Most Promising Scholar 2010 at the Academy of International Business. Dr. Nartey's work has been published in the *Strategic Management Journal* and is currently under review at other leading journals. She is originally from Ghana.

**NAME/TITLE:** Daniel J. Ostergaard, Lecturer, Sonoco International Business Department and as Director, Master of International Business (MIB) Program, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., International Business, University of South Carolina, Expected 2015; MPP, Harvard University, 2004; M. of National Security and Strategic Studies, U.S. Naval War College, 2003; B.S. in Government, U.S. Coast Guard Academy, 1994.

**PROFESSIONAL EXPERIENCE:** Daniel Ostergaard is the Moore School's Faculty Director of the MIB program. Previously, he served in the U.S. Coast Guard as a seagoing officer for 11 years of active duty and several years in the Reserve as a Lieutenant Commander. After 9/11, he served as Governor Jeb Bush's Homeland Security and Criminal Justice Liaison in Washington, D.C. where he worked closely with the new Office of Homeland Security (HS) at the White House, the U.S. Congress, and the Florida Department of Law Enforcement (FDLE). Thereafter, he served in the U.S. Department of HS where he was a senior advisor to Secretary Tom Ridge and Secretary Michael Chertoff. He led the HS Advisory Council and was involved with strategic policy development as well as international consensus building and diplomacy. He left government service in 2006 and later founded Pelorus Enterprises, LLC, an international business development consulting company. In November 2007, Mr. Ostergaard was appointed as the Director for Western Carolina University's Institute for the Economy and the Future: a regional think-tank dedicated to public and private sector policy development.

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**NAME/TITLE:** La Trice Ratcliff Small, Assessment Director, Institutional Research and Assessment, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D. Candidate (expected graduation 2016) – Higher Education Administration, University of South Carolina, MBA General Management, St. Mary's University, San Antonio, 2003; BBA in Human Resources Management, St. Mary's University, 1997.

**PROFESSIONAL EXPERIENCE:** Since 2005, Ms. Ratcliff-Small has served as the Assessment Director for the Darla Moore School of Business. She is responsible for managing the school's assessment processes in compliance with the Assurance of Learning standards for the school (AACSB) and the University (SACS). She is also responsible for the dissemination and reporting accuracy of the school's data for submission to various rankings entities to include Business Week, U.S. News, and Financial Times. La Trice is also a former Graduate Research Assistant in the Office of Planning, Assessment and Research at Clark-Atlanta University in 2001. Her professional experience include client relations with West Teleservices as a Client Services Account Manager from 1998 – 2001, and Human Resources experience with West Teleservices from 1997-1998.

**NAME/TITLE:** Lucy J. Reuben, Professor of the Practice of Business Administration, Fuqua School of Business, Duke University

**EDUCATION:** Ph.D. and M.B.A. (With Distinction), University of Michigan; B.S., Oberlin College.

**PROFESSIONAL EXPERIENCE:** Dr. Reuben is the Founding Director of the PhD Pipeline Opportunity Program and the Curriculum Director for the LEAD Summer Business Institute. She is the Spring 2011 recipient of Duke University's "Equity, Diversity and Inclusion Award" and the winner of the 2011 University Diversity Award. Reuben has taught courses and led study abroad programs to South Africa and China. She discussed her work in South Africa as invited presenter at the 2009 CIBER Short-Term Study Abroad Conference in Provo, Utah. She was a lecturer for the "Grow Your Venture" Program, sponsored by the University of Witwatersrand's Centre for Entrepreneurship (South Africa), and she serves as an International External Examiner for the University of Fort Hare's doctoral program in the Faculty of Management and Commerce (South Africa). Dr. Reuben created and directed the DukeEngage Program for Entrepreneurship and Economic Development in the Republic of Trinidad and Tobago. Moreover, she has made presentations in the Caribbean and Latin America. Early in her career, she studied at the University of Ghana. Reuben has been a participant in the AASCU Millennium Leadership Institute, a Kellogg MSI Leadership Fellow and a Nissan Fellow at the University of Chicago. She served as Provost and Vice Chancellor for Academic Affairs at North Carolina Central University after her position as Dean and Marshall B. Williams Professor at the School of Business of South Carolina State University. Other faculty appointments were at Florida A&M University and George Mason University, beginning her professorial career at Duke University.

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**NAME/TITLE:** Robert J. Rolfe, Professor, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Accounting, University of Oklahoma, 1983; B.S. Southern College, 1978.

**PROFESSIONAL EXPERIENCE:** Dr. Rolfe has taught various international business courses at the undergraduate and master levels at the University of South Carolina. He has been a visiting professor at prestigious institutions around the world, including the French Business School, the Mediterranean School of Business (Tunisia), and the Wirtschaftsuniversitat Wien (Austria). From August 2001 to May 2005, he was Executive Director of the International MBA Program at the Moore School of Business. His research focuses on foreign investment in Africa. He has published in several journals including the *Journal of International Business Studies*, *Advances in International Accounting*, the *Journal of the American Taxation Association*, *South African Journal of Economics*, and the *Journal of African Business*. Dr. Rolfe has received several awards for his research and teaching including the Cramer Fellow of International Taxation, the Alfred G. Smith Award for Excellence in Teaching, and the MIBS Outstanding Professor Award. He is a member of the Academy of International Business and the African Studies Association.

**NAME/TITLE:** Kendall Roth, Senior Associate Dean of International Programs & Partners, Professor and Chair, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Business Administration, International Business Major, University of South Carolina, 1986; B.S., University Studies, Oklahoma State University, 1979.

**PROFESSIONAL EXPERIENCE:** Dr. Roth holds the J. Willis Cantey Chair of International Business and Economics and is a Fellow of the Academy of International Business. He has been a faculty member at DMSB since 1986, and a recipient of the USC Educational Foundation Award for Research in Professional Schools. He is the Executive Director of CIBER and also is the Chair of the Sonoco International Business Department. He serves on the International Advisory Committee, Office of the Provost. Dr. Roth teaches global strategic management in the IMBA Program, and doctoral seminars in international business theory and cultural frameworks and methods. He has received the Alfred G. Smith Award for Excellence in Teaching. His research interests focus on institutional and socio-cultural approaches to understanding organization practices and routines within multinational enterprises. His interests include cultural frameworks from a methodological perspective, and applied to understanding behaviors within the multinational enterprise context. Dr. Roth's research has been published in top tier academic journals, including the *Academy of Management Journal*, *Academy of Management Review*, *Strategic Management Journal* and *Journal of International Business Studies*. He currently is serving his fifth term on the editorial board of the *Academy of Management Journal* and is also on the editorial board of *Strategic Management Journal*. He is on the Consulting Editors Board of *Journal of International Business Studies* and the Senior Advisory Board of *Global Strategy Journal*. Professionally, he has been involved in the Academy of Management, serving in roles such as a member of the Research Committee in the International Management Division, and chairing the AMJ Best Paper Committee. He has been active in AIB, most recently as chair of the Richard Farmer Dissertation Award Committee and as a member of the AIB Best Paper Award Committee.

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**NAME/TITLE:** Frank Rydzewski, Clinical Faculty, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina

**EDUCATION:** MBA in Finance, Drexel University, 1974, BA in Business, Rutgers University, 1973, Certified Global Business Professional (CGBP) from NASBITE, 2011.

**PROFESSIONAL EXPERIENCE:** Mr. Frank Rydzewski has expertise in corporate global strategy and implementation, cross-cultural business relations, and extensive multi-national corporate dealings around the world. He joined USC in 2012, after five-plus years at the Tippie College of Business, University of Iowa. At Iowa, he taught global strategy, international business, and global learning experiences to Executive MBA's, MBA's and undergraduate business students. He was voted faculty of the year for core MBA courses in 2007, and in 2011 for elective courses. He has led student-learning courses to Brazil, Argentina, Chile, Korea, Germany, Italy, Hong Kong, and China. Frank's 32 years of business experience includes 21 years with Air Products (\$10 billion multi-national company) in the areas of finance, operations and global commercial P&L management. He was President of Penford Products, a specialty starch producer for the paper and textile Industries. He also served for six years as the CEO of American Profol, a privately owned multi-national company. His teaching style focuses on the latest theories, combined with practical applications and examples. He currently teaches Global Competitiveness to Undergraduates and MBAs, as well as Business in Latin America and International Mergers & Acquisitions. He instructs Short Term Study Abroad courses with Undergraduates & MBAs to Latin America.

**NAME/TITLE:** Barry L. Saunders, Vice President and Chief Financial Officer, Sonoco Products Company, Hartsville, South Carolina.

**EDUCATION:** MBA, University of South Carolina, 1989; B.S., Business Administration, University of South Carolina, 1981.

**PROFESSIONAL EXPERIENCE:** Mr. Saunders has been with Sonoco for twenty-five years, and in his current role for almost four years, where he has responsibility for all corporate financial and accounting activities (including financial reporting and accounting shared services) and all of Sonoco's business unit finance groups throughout the world (as all finance managers including the regional financial managers in Europe, Asia and Latin America report to him). He is a member of Sonoco's Management Committee, Risk Management Committee and Employee Benefits Investment Committee. Prior to being promoted to this position, he was based in Brussels, Belgium for four years where he served as Director of Finance for Sonoco's European operations. Other positions with Sonoco have included being Director of Financial Reporting and Assistant Treasurer/Director of Global Treasury Operations. Prior to joining Sonoco, Barry was an Audit Manager with Ernst & Young. Mr. Saunders is a Certified Public Accountant (CPA), and a member of the University of South Carolina CIBER International Business Advisory Council (IBAC).

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**NAME/TITLE:** Michael A. Shealy, CIBE Director and Regional Director, Africa, Middle East and Italy, Office of International Activities, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Command and General Staff College (CGSC), U.S. Army, Fort Leavenworth, KS, 1994; M.A. coursework, West European Studies, Indiana University, 1993; Defense Language Institute-Foreign Language Center (DLI-FLC), Monterey, CA (German, 1991; Italian, 1984), B.A., English, Presbyterian College, Clinton, South Carolina, 1981.

**PROFESSIONAL EXPERIENCE:** Mike Shealy has served as the Director of the University of South Carolina's Center for International Business Education (CIBE) since October 1994. As the principal administrator for the Center, Mike manages the federal, state and private funds and budgets associated with the CIBE. He is responsible for all assessments and evaluations of the Center activities, and submits all federal reports to the U.S. Department of Education. Among his other duties as CIBE Director and Regional Director, Mike has led both student and faculty study abroad trips and overseas study tours to North Africa, Sub-Saharan Africa and the Middle East on an annual basis since 2004. He also manages all the Faculty Development in International Business (FDIB) programs for the school, as well as most international business meetings, conference, workshops and national/international events. As a Regional Director, Mike collaborates with partner institutions and businesses on exchange agreements, language training and study abroad/internship opportunities. He speaks Italian and German and is slowly learning Swahili and Zulu. Mike served on active duty (16 years) and reserve status (10 years) in the United States Army from 1982-2006, and retired as a Lieutenant Colonel, Military Intelligence, in 2006. He also taught middle school English in Cayce, SC, from 1981-82, while attending the M.A.T. graduate program in Education at the University of South Carolina.

**NAME/TITLE:** Andrew Spicer, Associate Professor of International Business, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Wharton School, University of Pennsylvania, 1998.

**PROFESSIONAL EXPERIENCE:** Dr. Spicer previously taught at the A. Gary Anderson Graduate School of Business, University of California, Riverside. His research and teaching focuses on the intersection of business and society in a global economy. His research has examined privatization policies and outcomes in post-communist countries; the effects of national context and identity on managers' ethical evaluations and behaviors; the processes that lead to the spread of corrupt business practices across regions and companies; and the role of institutional context in shaping business models designed to combat poverty around the world. He has published articles on these topics in the *Academy of Management Journal*, *Academy of Management Review*, *Strategic Management Journal*, *Journal of Business Ethics*, *Industrial and Corporate Change* and *Strategic Organizations*. He has also written a series of teaching cases about the formulation and implementation of Walmart's sustainability strategy. He teaches courses on globalization, international business and sustainable development and currently serves as the academic coordinator of the International Master of Business Administration (IMBA) program at the Moore School. He also acts as lead instructor for the survey course on international business offered through the Moore School's Faculty Development in International Business (FDIB) program.

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**NAME/TITLE:** Hildy Teegen, Professor, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Business Administration, International Business Major, 1993, and BBA, BA, International Business, Finance, Latin American Studies, University of Texas at Austin.

**PROFESSIONAL EXPERIENCE:** Dr. Teegen holds the USC Education Foundation Professorship in International Business and joined the Moore School as Dean, serving from 2007-2013. She served as a Senior Specialist with the Fulbright organization in Lima Peru in Fall, 2014. She formerly served as Founder and Director of the George Washington University Center for International Business Education and Research and as Professor of International Business and International Affairs there. She teaches in the areas of international negotiations, managing in developing countries and foreign market analysis. She co-designed and led the Duke University CIBER International Business Negotiation Faculty Development program for several years. Her research concerns the strategic interaction between multinational firms, governments and nongovernmental organizations, particularly in domains related to economic development and sustainable business. Dr. Teegen's research has been published in top tier academic journals, including the *Academy of Management Journal* and the *Journal of International Business Studies*. She is co-author of several books, most recently of the seminal study commissioned by the Association for the Advancement of Colleges and Schools of Business (AACSB) on the globalization of management education. She formerly served as Department Editor (Institutions and Comparative Capitalism area) for the *Journal of International Business Studies* and reviews regularly for many top tier journals in management. She serves on the Continuous Improvement Review Committee of the AACSB, the Editorial Board of *Biz Ed*, as an executive board member for the Center for International Private Enterprise (one of the National Endowment for Democracy organizations), as an Advisor to the International Finance Corporation (private sector division of the World Bank Group) on business and sustainability, is a member of the Aspen Institute's Global Leadership Network and is a member of the Young Presidents Organization. She was named a Liberty Fellow in 2008.

**NAME/TITLE:** Marc van Essen, Assistant Professor, Sonoco International Business Department, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D. (Cum Laude), Business Administration, Rotterdam School of Management, Erasmus University, 2011; M.sc., Economics and Law (Cum Laude), Utrecht University, 2007.

**PROFESSIONAL EXPERIENCE:** Marc van Essen is an Assistant Professor at the Sonoco International Business Department at the Darla Moore School of Business. He teaches Doing business in Europe at the undergraduate and PMBA level, and doctoral seminars in international business theory, comparative corporate governance, and different empirical methods. His primary research interests cover comparative corporate governance, institution-based view of business strategy, and meta-analytic research methods, with a particular focus on ownership concentration and identity. His work has been published or is forthcoming in: *Academy of Management Journal*, *Asia Pacific Journal of Management*, *Journal of Banking and Finance*, *Journal of International Business Studies*, *Journal of Management*, and *Organization Science*. He is a member of the Academy of International Business, Academy of Management, American Law and Economics Association, and Meta-Analysis of Economics Research (MAER) Network. Additionally, he received several research distinctions and awards, including the Richard Farmer Best Dissertation Award of the Academy of International Business (2012), winner of International Management Division Best Paper Award at annual meeting of Academy of Management (2011), and the best paper proceedings of the 68<sup>th</sup>, 70<sup>th</sup>, 71<sup>st</sup> and 73<sup>rd</sup> annual meetings of the Academy of Management. He is currently serving his third term on the editorial board of *the Asia Pacific Journal of Corporate Governance: An International Review*. He is a reviewer for other journals, including: *Academy of Management Journal*, *Organization Science*, and *Strategic Management Journal*.

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**NAME/TITLE:** Douglas Woodward, Director of Division of Research and Professor of Economics, Darla Moore School of Business, University of South Carolina.

**EDUCATION:** Ph.D., Economics, University of Texas, 1986; M.A., Economics, NYU, 1981, B.A. Economics, State University of New York (SUNY) Purchase, 1978.

**PROFESSIONAL EXPERIENCE:** Dr. Woodward joined the University of South Carolina faculty in 1987. His primary research interests today are regional economics, firm location, urban and industrial clustering, and foreign direct investment. He is co-author of a book on foreign direct investment in the United States, *The New Competitors*, ranked as one of the “top ten business and economics books” by Business Week and listed by Fortune as one of the books “CEOs are reading.” He has published widely in academic journals, including the *Journal of Urban Economics*, the *Journal of Regional Science*, *Regional Science and Urban Economics*, the *Journal of Economic Geography*, and the *Review of Economics and Statistics*. A recent paper examines the clustering of independent inventor in U.S. counties. He also has ongoing research investigating foreign investment and entrepreneurial success in Africa. In 2013-14, Woodward is examining regional cluster development in the Southeastern US, Southern Germany, and Northeast China as the Governor Hodges Research Fellow in the Darla Moore School of Business. Over his career, he has received numerous grants; from the National Science Foundation, the U.S. Department of Education, and many other funding agencies. He has testified before local, state, and national government committees and has presented his research at many conferences around the world, including the World Economic Forum in Davos, Switzerland. He has often appeared in the media discussing economic development and related topics. Professor Woodward served as the 2013 President of the North American Regional Science Council and serves on the scientific council of the Regional Science Association International. He is Associate Editor of the *Journal of Regional Science* and the *Review of Regional Studies*. From 2010-2011 he was President of the Southern Regional Science Association.

## **Section 7**

### Other Narrative Attachment Form

- CIBE Budget Notes

**Budget Notes**  
**Detailed Budget Explanation: October 1, 2014 - September 30, 2018**

All figures for faculty salaries included in the proposal are based on the nine- or twelve-month salaries of the individuals designated depending on their terms of appointment. Salary figures used are those for 2014-2015. In cases where a particular faculty member has not yet been assigned to a specific activity, the average Moore School of Business salary (\$150,000) was used.

*Fringe benefits for all faculty and staff are calculated at 23.81% (15.52% for state retirement, 7.65% for FICA, 0.09% for unemployment compensation, and 0.55% for worker's compensation) of salary. Health insurance rates for twelve month and nine month appointments (respectively) are \$346.92 and \$462.66 (employees only), \$672.20 and \$896.27 (employee/spouse), \$524.30 and \$699.07 (employee/child), and \$507.04 and \$1,117.04 (full family) per person per month. Fringe benefits for graduate research and teaching assistants are calculated at 0.3% of salary. Fringe benefits for temporary help are calculated at 8.29% of salary. An 8% indirect cost rate has been applied to total direct charges budgeted for both the Department of Education and the University of South Carolina.*

The per diem for all foreign travel will not exceed the State Department rate for that destination. Foreign travel will comply with the Fly America Act and/or the Open Skies Agreement, as applicable.

The budget narrative covers the budget for all four years. Where levels of support are requested or matching funds vary by year, a full explanation is provided in the appropriate location. The Budget Category enumeration used in these **Budget Notes is the same as that used on ED Form 524: (1) Personnel, (2) Fringe Benefits, (3) Travel, (4) Equipment, (5) Supplies, (6) Contractual, (7) Construction and (8) Other.**

**CENTER ADMINISTRATION:**

**1. Personnel:** The Faculty Executive Director of CIBE, Senior Associate Dean Kendall Roth, and Mike Shealy, CIBE Director, will devote 25% and 75% of their time (respectively) to the administration of the Center in all four years. The Research Director, Professor Tatiana Kostova, and the Outreach Director, Professor Hildy Teegen, will each devote 10% of their time to the administration of the research and outreach efforts (respectively) of CIBE. These cost share figures of time and effort by the CIBE administration is increased by 3.0% per annum for succeeding years of the grant.

**3. Travel:** DOE foreign travel funding of \$9,000 (Year 1), \$8,000 (Year 2), \$4,000 (Year 3), and \$3,500 (Year 4) is requested for the CIBE Administration to visit overseas locations to visit international partner schools, faculty and students. DOE domestic travel funding of \$3,000 (Year 1) and \$1,000 (Years 2, 3 and 4) is requested for the CIBE Administration to travel to U.S. locations for CIBE conferences, workshops and meetings.

**5. Supplies:** (a). DOE funding of \$1,000 is requested (Year 1) and \$500 (Years 2, 3 and 4) for the purchase of supplies used in CIBE activities; (b). USC will provide a total of \$2,450 in supplies during the four years of the grant.

**8. Other:** DOE funding in the amount of \$2,500 in Year 1 is requested to support the USC CIBE website construction and maintenance, CIBEWeb update and maintenance, and other database requirements for administration of the grant.

**GRADUATE 1. Master of International Business (MIB):**

**3. Travel:** (a). DOE foreign travel funding of \$5,000 (Year 1) and \$4,000 (Year 2) is requested for MIB personnel to travel to overseas locations for the development of MIB dual degree programs with international partner schools; (b). USC will also provide \$4,000 (Years 1 and 2) and \$2,500 (Year 3) in foreign travel for this activity.

**GRADUATE 2. International MBA (IMBA) Program:** No DOE funding is requested for this activity.

**GRADUATE 3. International MBA (IMBA) Program – Russia Track:**

**3. Travel:** (a). DOE foreign travel funding of \$4,000 (Year 1) is requested for IMBA personnel and other staff to travel to Russia for the development of IMBA language track training and internship opportunities; (b). USC will also provide \$1,500 (Year 2) in foreign travel for this activity.

**GRADUATE 4. International MBA (IMBA) Program – EGADE Business School Dual Degree:**

**3. Travel:** (a). DOE foreign travel funding of \$2,000 (Year 1) is requested for IMBA personnel and other staff to travel to Latin America for the development of the IMBA dual degree program with EGADE Business School, Technologico de Monterrey; (b). USC will also provide \$2,000 (Year 1) and \$3,000 (Year 2) in foreign travel for this activity.

**GRADUATE 5. International MBA (IMBA) Program – Cultural-Institutional Assessment Course Module:**

**8. Other:** (a). DOE funding of \$1,000 (Years 1 and 2), \$10,000 (Year 3) and \$2,000 (Year 4) is requested for curriculum development for this activity; (b). USC will also provide \$1,000 (Year 1) and \$2,000 (Year 2) in funds for this activity.

**GRADUATE 6. International MBA (IMBA) Program – Language Track Assessment Procedures:**

**8. Other:** DOE funding of \$2,500 (Years 1 and 3), \$2,200 (Year 2) and \$3,000 (Year 4) is requested for curriculum development/assessment for the Language Track Assessment Procedures activity.

**GRADUATE 7. International MBA (IMBA) Program – Text Analytics Training:**

**8. Other:** DOE funding of \$10,000 per grant year for each year of the four-year grant is requested for training and application of Text Analytics for this activity.

**GRADUATE 8. One Year MBA Program – University of New South Wales Dual Degree:**

**3. Travel:** (a). DOE foreign travel funding of \$2,500 (Year 1) is requested for MBA personnel to travel to Australia to develop the dual degree with the University of New South Wales, Australian School of Business; (b) USC will provide \$2,000 (Year 1) and \$3,000 (Years 2 and 3) in foreign travel funds for this activity.

**GRADUATE 9. Professional MBA (PMBA) Program – International Business Certificate and STSA Development:**

**3. Travel:** DOE foreign travel funding of \$2,000 (Years 2 and 3) is requested for PMBA and/or Study Abroad personnel to travel to overseas locations to develop STSA opportunities and coordinate the International Business Certificate development.

**PhD 1. Doctoral Student Education – International Dual Degree PhD Programs (Cotutelle):**

**3. Travel:** DOE foreign travel funding of \$2,000 (Years 3 and 4) is requested for CIBE PhD program manager personnel to travel to overseas locations to develop and coordinate the *Cotutelle* programs; (b) USC will provide \$1,000 (Years 3 and 4) in foreign travel funds for this activity.

**UNDERGRADUATE 1. Cohort Program - International Business and Chinese Enterprise (IBCE):**

**3. Travel:** Although no DOE funding is requested for this activity, USC will provide a total of \$10,500 in foreign travel funds over the four-year grant period for this activity.

**UNDERGRADUATE 2. Cohort Program Development – Critical and Foreign Languages:**

**3. Travel:** DOE foreign travel funding of \$6,000 (Years 1, 2 and 3) is requested for overseas travel to develop and coordinate cohort programs in Arabic, Portuguese, French, German and Spanish; (b) USC will provide a total of \$26,000 in foreign travel funds over the four-year grant period for this activity.

**UNDERGRADUATE 3. Cohort Program Development – Multi-Country Thematic-Based Programs:**

**3. Travel:** DOE foreign travel funding of \$5,000 (Years 1 and 2) is requested for overseas travel to develop and coordinate two distinct multi-country cohort programs with six separate international partner schools; (b) USC will provide a total of \$21,000 in foreign travel funds over the four-year grant period for this activity.

**UNDERGRADUATE 4. International Business Major – Language Assessment Procedures:**

**8. Other:** DOE funding of \$1,500 (Years 1 and 2), \$2,000 (Year 3) and \$3,000 (Year 4) is requested for curriculum development/assessment for the Language Assessment Procedures activity for the International Business Major.

**UNDERGRADUATE 5. International Business Major – International Business Career Day:**

**8. Other:** DOE funding of \$2,000 (Year 1) and \$1,000 (Years 2, 3 and 4) is requested for curriculum and event development for the International Career Day; (b) USC will provide \$2,000 (Year 1) and \$1,000 (Years 2, 3 and 4) for this activity.

**UNDERGRADUATE 6. Functional Major Programs – Functional Department Corporate Boards:** No DOE funding is requested for this activity.

**UNDERGRADUATE 7. Functional Major Programs – Development of STSA Programs:**

**3. Travel:** DOE foreign travel funding of \$5,000 (Year 1), \$3,000 (Year 2) and \$2,000 (Year 3) is requested for overseas travel to develop and coordinate STSA programs; (b) USC will provide \$9,000 (Year 1) and \$2,000 (Years 2 and 3) for this activity.

**BUSINESS 1. Outreach to Businesses/Government – Regional/SC Cluster & Economic Development Comparative Institutional Analysis:**

**1. Personnel:** The CIBE Outreach Director will devote an additional 10% of her time to this activity each year of the four-year grant.

**3. Travel:** DOE foreign travel funding of \$32,000 (Year 1), \$50,000 (Year 2), \$60,000 (Year 3), and \$65,000 (Year 4) is requested for the Outreach Director and a team of faculty and students to travel to overseas locations in support of this activity. DOE domestic travel funding of \$3,000 (Year 1) and \$5,000 (Years 2 and 3) and \$10,000 (Year 4) is requested for the team and the Outreach Director to travel to U.S. locations in support of this activity; (b). USC will provide \$8,000 (Year 3) and \$13,000 (Year 4) in foreign travel funds for this activity.

**BUSINESS 2. Outreach to Businesses/Government – Export Market Entry Studies Initiative:**

**8. Other:** DOE funding of \$2,000 in each year of the four-year grant is requested for data acquisition and materials in support of this activity.

**BUSINESS 3. Outreach to Businesses/Government – Executive Programs (Customized and Public):** No DOE funding is requested for this activity.

**OUTREACH 1. National/Regional Outreach – MSI Internationalization Initiative:**

**3. Travel:** DOE foreign travel funding of \$17,500 (Year 2) and \$12,500 (Year 3) is requested for MSI faculty and students to travel on STSA programs led by USC faculty and staff.

**8. Other:** (a). DOE funding in the amount of \$10,000 (Year 1) and \$8,000 (Year 4) is requested in instruction, respectively, for on-site Faculty in International Business (FDIB) pedagogical seminars for MSI and Community College faculty and for a Paper Development workshop; (b). DOE domestic travel funding of \$3,000 (Years 1 and 3) and \$2,500 (Year 2) is requested for USC faculty travel to the on-site FDIB seminars and MSI partner-school locations for one-on-one mentoring visits in support of this activity; (c). DOE funding in the amount of \$12,000 (Year 1) and \$10,000 (Year 4) is requested for the conference venue expenses for, respectively, the FDIB seminars and the Paper Development workshop.

**OUTREACH 2. National/Regional Outreach – Annual International Business Research Conference:**

**8. Other:** (a). DOE funding in the amount of \$12,000 (Year 1) and \$10,000 (Years 2, 3 and 4) is requested for the conference venue expenses; USC will provide a total of \$5,500 during the first three years of this grant in support of this activity; (b). DOE domestic travel funding of \$6,000 (Years 1 and 2) and \$5,000 (Years 3 and 4) is requested for outreach faculty travel to the conference venue; USC will provide a total of \$3,000 in domestic travel for outreach faculty in the first three years of this grant in support of this activity; (c). DOE funding in the amount of \$1,500 (Year 1, 2 and 3) and \$1,000 (Year 4) is requested for the materials for the conference; USC will provide a total of \$1,700 for materials in the first three years of this grant in support of this activity; (d). DOE funding in the amount of \$500 per grant year is requested for printing and postage expenses for this activity; USC will provide a total of \$1,500 for printing and postage in the first three years of this grant in support of this activity; (e). DOE funding in the amount of \$2,000 per grant year is requested for payment of honoraria to distinguished outreach faculty participants of this annual conference.

**OUTREACH 3. National/Regional Outreach – Culture and Finance Conference in association with the *Journal of Corporate Finance*:**

**8. Other:** (a). DOE funding in the amount of \$15,000 (Year 1) is requested for the conference venue expenses; USC will provide \$2,000 (Year 1) in support of this activity; (b). DOE domestic travel funding of \$6,000 (Year 1) is requested for outreach participant travel to the conference venue; USC will provide \$1,000 (Year 1) in domestic travel for outreach participant faculty for this activity; (c). DOE funding in the amount of \$1,000 (Year 1) is requested for the materials for the conference; (d). DOE funding in the amount of \$1,500 (Year 1) is requested for printing and postage expenses for this activity; USC will provide \$250 for printing and postage (Year 1) for this activity; (e). DOE funding in the amount of \$5,000 (Year 1) is requested for payment of honoraria to distinguished outreach faculty participants of this Year 1 conference.

**OUTREACH 4. National/Regional Outreach – Faculty Development in International Business (FDIB) – Scholarship Assistance to Business Faculty (MSI and Community College Faculty):**

**8. Other:** (a). DOE funding in the amount of \$10,000 (Year 1) and \$15,000 (Years 2, 3 and 4) is requested to provide scholarship stipend support to faculty from underrepresented schools – primarily MSI and Community Colleges – to attend the annual USC FDIB pedagogical seminars each summer.

**OUTREACH 5. National/Regional Outreach – Faculty Development in International Business (FDIB) New Courses Development:** No DOE funding is requested for this activity.

**OUTREACH 6. National/Regional Outreach – FDIB-Sub-Saharan Africa Program:**

**8. Other:** (a). DOE participant foreign travel funding in the amount of \$6,000 (Years 1, 2 and 3) and \$8,000 (Year 4) is requested for support to faculty from underrepresented schools – primarily MSI and Community Colleges – to attend the annual USC overseas FDIB-Sub-Saharan Africa program; (b). DOE funding of \$15,000 (Year 1), \$13,500 (Years 2 and 3) and \$13,000 (Year 4) is requested for outreach faculty scholarship stipends/program fees to attend this annual program.

**OUTREACH 7. National/Regional Outreach – FDIB-MENA Program:**

**8. Other:** (a). DOE participant foreign travel funding in the amount of \$6,000 (Years 2 and 3) and \$8,000 (Year 4) is requested for support to faculty from underrepresented schools – primarily MSI and Community Colleges – to attend the annual USC overseas FDIB-MENA program; (b). DOE funding of \$9,000 (Years 2 and 3) and \$10,000 (Year 4) is requested for outreach faculty scholarship stipends/program fees to attend this program.

**OUTREACH 8. National/Regional Outreach – FDIB-China/Hong Kong Program:**

**8. Other:** (a). DOE participant foreign travel funding in the amount of \$2,000 per grant year is requested for support to faculty from underrepresented schools – primarily MSI and Community Colleges – to attend the annual overseas FDIB-China/Hong Kong program, lead-managed by the University of Colorado Denver; (b). DOE funding of \$4,000 per grant year is requested for outreach faculty scholarship stipends/program fees to attend this annual program.

**OUTREACH 9. National/Regional Outreach – Workshop on Teaching Spanish for International Business for Professors of Spanish:**

**1. Personnel:** DOE funding of \$4,000 (Years 2, 3 and 4) is requested for instruction in the Summer Program in Business and Language by a USC faculty of the Moore School of Business.

**8. Other:** (a). DOE funding in the amount of \$8,000 (Years 2, 3 and 4) is requested for instruction by USC language faculty; (b). DOE domestic travel funding of \$2,000 (Years 2, 3 and 4) is requested for faculty travel to the conference venue; (c). DOE funding in the amount of \$500 per grant year is requested for the marketing materials and materials for the conference; USC will provide a total of \$1,500 for materials in the first three years of this grant; (d). DOE funding in the amount of \$1,000 (Year 1) and \$250 (Years 2, 3 and 4) is requested for printing and postage of marketing materials; USC will provide a total of \$1,500 for printing and postage in the first three years of this grant; (e). DOE funding in the amount of \$8,000 (Years 2, 3 and 4) is requested for scholarships for MSI, Community College and High School faculty participants of this conference.

**OUTREACH 10: National/Regional Outreach – USC Summer Language Institute (SLI):**

**8. Other:** DOE funding of \$7,000 (Year 1) and \$6,000 (Years 2, 3 and 4) is requested for curriculum development and student participation in support of this activity.

**OUTREACH 11. National/Regional Outreach – CIBE Business Language Conference Consortium:**

**3. Travel:** DOE domestic travel funding of \$3,000 per grant year is requested for MSI and Community College faculty to travel to this annual conference.

**8. Other:** (a). DOE funding in the amount of \$2,500 per grant year is requested for scholarships for MSI and Community College faculty participants of this conference; (b). DOE funding in the amount of \$3,000 per grant year is requested for consortium sponsorship fees as a Steering Committee member of the annual conference.

**OUTREACH 12: National/Regional Outreach – CUIBE and GBSN Membership Support:** Although no DOE funding is requested for this activity, USC will provide a total of \$7,000 per grant year in support of these memberships.

**OUTREACH 13. National/Regional Outreach – Collaboration with International Magnet Middle/High Schools:**

**8. Other:** (a). DOE funding in the amount of \$2,000 (Years 1, 2 and 3) is requested for support of an annual workshop; (b). Although no DOE funding is requested for the Ambassador Program activity, USC will provide \$1,000 (Years 1, 2 and 3) in support of this activity.

**RESEARCH THEME 1. Comparative Corporate Governance, Institutions and Global Strategy:**

**1. Personnel:** Four USC faculty will each devote 2.5% of their time to this research activity. These cost share figures of time and effort by the faculty is increased by 3.0% per annum for succeeding years of the grant.

**3. Travel:** DOE foreign travel funding of \$30,000 (Year 1) and \$25,000 (Years 2, 3 and 4) is requested in order for USC faculty to conduct international data gathering/research for this research theme over the four-year grant cycle. DOE domestic travel funding of \$3,000 per grant year is requested to conduct research on these projects over the four-year grant cycle.

**8. Other:** DOE funding in the amount of \$2,000 per grant year is requested for the purchase of research databases.

**RESEARCH THEME 2. Industry Clusters, Innovation and Global Competitiveness:**

- 1. Personnel:** Four USC faculty will each devote 2.5% of their time to this research activity. These cost share figures of time and effort by the faculty is increased by 3.0% per annum for succeeding years of the grant.
- 3. Travel:** DOE foreign travel funding of \$20,000 (Year 1) and \$25,000 (Years 2, 3 and 4) is requested in order for USC faculty to conduct international data gathering/research for this research theme over the four-year grant cycle. DOE domestic travel funding of \$2,000 per grant year is requested to conduct research on these projects over the four-year grant cycle.
- 5. Supplies:** DOE funding of \$1,000 per grant year is requested for supply purchases in support of this research theme.
- 8. Other:** DOE funding in the amount of \$2,000 per grant year is requested for the purchase of research databases.

**RESEARCH THEME 3. Managing Global Political Risk and Legitimacy of MNCs – Africa Focus:**

- 1. Personnel:** Three USC faculty will each devote 2.5% of their time to this research activity. These cost share figures of time and effort by the faculty is increased by 3.0% per annum for succeeding years of the grant.
- 3. Travel:** DOE foreign travel funding of \$24,000 (Year 1), \$20,000 (Years 2 and 4) and \$17,000 (Year 3) is requested in order for USC faculty to conduct international data gathering/research for this research theme over the four-year grant cycle. DOE domestic travel funding of \$2,000 (Years 1 and 3) and \$5,000 (Years 2 and 4) is requested to conduct research on these projects over the four-year grant cycle.
- 5. Supplies:** DOE funding of \$1,000 in each of the final three years of the grant is requested for supply purchases in support of this research theme.
- 8. Other:** DOE funding in the amount of \$4,000 (Years 1, 2 and 4) is requested for the purchase of research databases.

**RESEARCH 14. Competitive International Research Program – CIBER Scholars:**

- 3. Travel:** DOE foreign travel funding of \$10,000 per grant year is requested in order for USC faculty to conduct international data gathering/research for this activity over the four-year grant cycle.
- 8. Other:** DOE funding in the amount of \$3,000 (Year 1) is requested for the purchase of research databases.

**PROJECT EVALUATION. Evaluation and Assessment of CIBER Programs and Activities:**

- 1. Personnel:** La Trice Ratcliff-Small, Director of Assessment, will each devote 5.0% of her time to this activity. This cost share figure of time and effort by Ms. Ratcliff-Small is increased by 3.0% per annum for succeeding years of the grant.
- 5. Supplies:** (a). DOE funding of \$1,000 per grant year is requested for supply purchases in support of this activity; (b). USC will provide \$500 per grant year for supplies in support of this evaluation activity.
- 8. Other:** (a). DOE funding in the amount of \$4,000 (Year 3) is requested for honoraria for the external evaluators for this activity; (b). DOE domestic travel funding in the amount of \$3,000 (Year 3) is requested for the external evaluators travel to the USC campus; (c). DOE funding in the amount of \$2,500 (Year 1) is requested to purchase databases and/or produce surveys for assessment and evaluations of CIBE projects and activities during the entire grant cycle.

## **Section 8**

### Other Narrative Attachment Form

- Performance Measure Forms (PMF)
- CIBE Project Evaluation Plan
- CIBE Project Evaluation Chart

# CIBE Performance Measure Form (PMF)

## Master of International Business (MIB) Program

1. Project Goal Statement: Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business Master in International Business (MIB) Dual Degree Programs by 25 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
A) Create two to four additional MIB Dual Degree Programs to supplement the two current Dual Degree Programs	A.1 Establish partnership agreements for dual degree programs with Bocconi (Italy), Koç (Turkey) and two other international institutions from Russia, China, Spain, The Netherlands and/or Peru								
B) Increase by 25% the number of students enrolled in the MIB program	B.1 Execute joint recruiting with partner institutions in Germany, France, Italy, Turkey and the TBD two other countries for student enrollment in the MIB program  B.2 Recruit existing USC International Business undergraduate major and cohort students into the MIB program  B.3 Recruit business undergraduate students from other U.S. institutions								

# CIBE Performance Measure Form (PMF)

## International MBA (IMBA) Program

1. Project Goal Statement: Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business International MBA (IMBA) program by 35 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
A) Create an additional language track in Russian, to supplement the current language tracks of Arabic, Chinese, French, German, Italian, Japanese, Portuguese and Spanish	A.1 Establish an agreement based upon our current MOU with the Higher School of Economics (HSE) in Moscow, Russia for a Russian language track and for Russian language instruction in the IMBA program								
B) Create an IMBA Dual Degree program with EGADE Business School, Technologico de Monterrey, Mexico	B.1 Establish an MOU with EGADE to offer the IMBA Dual Degree program no later than fall 2016								

# CIBE Performance Measure Form (PMF)

## International MBA (IMBA) Program (cont'd)

<b>1. Project Goal Statement:</b> Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business International MBA (IMBA) program by 35 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
C) Create an IMBA course module focused on Cultural -Institutional Assessment	C.1 Develop and establish an IMBA course to further develop "culture fluency"  C.2. Create and disseminate a Cultural-Institutional Assessment Manual by 2017-18								
D) Develop standard language assessment procedures for all IMBA language tracks	D.1 Research and implement standardized language assessment tools for all IMBA language tracks  D.2. Financially support testing certification (e.g., ACTFL) for all IMBA language track students								

# CIBE Performance Measure Form (PMF)

## International MBA (IMBA) Program (cont'd)

1. Project Goal Statement: Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business International MBA (IMBA) program by 35 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
E) Design and implement Text Analytics training in the IMBA program	E.1 Train six IMBA students per year in IBM SPSS Modeler Text Analytics by an IBM certified training partner								
F) Increase by 35% the number of students enrolled in the IMBA program	<p>F.1 Execute joint recruiting with global partner institutions for international student enrollment in the IMBA program</p> <p>F.2 Target and recruit alumni (3-12 years after graduation) of our USC business majors and cohort programs into the IMBA program</p> <p>F.3 Target and recruit (1) highest level GMAT achievers each year and (2) population of business students with foreign language proficiency</p>								

# CIBE Performance Measure Form (PMF)

## One Year MBA Program

<b>1. Project Goal Statement:</b> Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business One Year MBA program by 25 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
A) Create a One Year MBA Dual Degree as part of USC's One Year MBA program launched in 2013	A.1 Establish and execute a partnership agreement for a One Year MBA dual degree program with the University of New South Wales, Australian Business School for fall 2016								
B) Increase by 25% the number of students enrolled in the One Year MBA program	B.1 Execute joint recruiting with global partner institutions or international student enrollment, particularly for dual degree options  B.2 Recruit graduates from other business programs at U.S. institutions  B.3 Establish new and/or increase existing student tuition stipends for enrollment in the One Year MBA program								

# CIBE Performance Measure Form (PMF)

## Professional MBA (PMBA) Program

<b>1. Project Goal Statement:</b> Increase the number of students graduating from the University of South Carolina’s Darla Moore School of Business Professional MBA (PMBA) program by 20 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
A) Develop and create three additional short-term study abroad (STSA) courses to supplement the current three (China, Europe and Latin America)	A.1 Collaborate with current international partner institutions to assist with STSA course hosting  A.2 Recruit current USC business faculty to lead – and USC business staff to assist with - the new STSA courses								
B) Increase by 20% the number of students enrolled in the PMBA program	B.1 Target and recruit business professionals, especially alumni, for enrollment in the PMBA program  B.2 Establish new and/or increase existing student tuition stipends for enrollment in the PMBA program								

# CIBE Performance Measure Form (PMF)

## Doctoral Programs

1. Project Goal Statement: Enhance the global knowledge of the University of South Carolina's Darla Moore School of Business Doctoral Candidates in International Business by increasing by at least 100 percent the global Dual Degree programs offered during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
A) Develop and create two initial PhD Dual Degree programs in international business	<p>A.1 Collaborate with two targeted partner institutions from among CUHK, Koç University, EGADE, and Universidad de Chile to formalize two agreements in 2014-2016</p> <p>A.2 Introduce two Dual Degree PhD programs with two international partner institutions in 2016-2018</p>								

# CIBE Performance Measure Form (PMF)

## Undergraduate International Business Cohort Programs

1. Project Goal Statement: Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business Undergraduate International Business Cohort programs by 25 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
A) Enhance the success of the current IBCE cohort program between USC and the Chinese University of Hong Kong	A.1 Continually revise and update the joint core curriculum, specialized courses, language development and language immersion programs as needed								
B) Develop additional cohort programs modeled after the IBCE cohort program, increasing overall enrollment of cohort students by at least 50%	B.1 Establish undergraduate cohort programs in Arabic (AUC), Portuguese (partner TBD), French (Université Paris-Dauphine), German (University of Mannheim) and Spanish (Universidad de Chile) by 2018								

# CIBE Performance Measure Form (PMF)

## Undergraduate International Business Cohort Programs (cont'd)

1. Project Goal Statement: Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business Undergraduate International Business Cohort programs by 25 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
C) Develop two undergraduate international business cohort multi-country collaborations	<p>C.1 Develop and establish a three-way multi-country/institution cohort program with USC's Moore School of Business, the University of New South Wale's Australian School of Business and CUHK-Shenzhen</p> <p>C.2. Develop and establish a four-way multi-country/institution cohort program with USC's Moore School of Business, the University of Mannheim, ESSEC-Singapore, and Fundacao Getulio Vargas-Rio de Janeiro</p>								

# CIBE Performance Measure Form (PMF)

## Undergraduate International Business and Functional Major Programs

1. Project Goal Statement: Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business Undergraduate International Business Major (with a Double Major in a Functional Area) by 25 percent during the grant period when compared to the prior four-year period.										
2. Performance Measures	3. Activities	4. Data/Indicators	5. Frequency	6. Data Source	7. Baseline and Targets					
					BL	T1	T2	T3	T4	
A) Develop standard language assessment procedures for all Undergraduate IB Majors	A.1 Research and implement standardized language assessment tools for all IB majors and cohort students  A.2 Financially support testing certification (e.g., ACTFL) for all IB Major and cohort students									
B) Support an International Business Career Day, launched in 2014	B.1 Enhance the IB Career Day into a formal annual event, to include additional corporate collaboration and sponsorship for IB placement opportunities and career progression for IB students									

# CIBE Performance Measure Form (PMF)

## Undergraduate International Business and Functional Majors Programs (cont'd)

<b>1. Project Goal Statement:</b> Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business Undergraduate International Business Major (with a Double Major in a Functional Area) by 25 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
C) Develop two undergraduate international business cohort multi-country collaborations	C.1 Establish a three-way multi-country/institution cohort program with USC's Moore School of Business, the University of New South Wales Australian School of Business and CUHK-Shenzhen  C.2. Establish a four-way multi-country/institution cohort program with USC's Moore School of Business, University of Mannheim, ESSEC-Singapore, and Fundacao Getulio Vargas-Rio de Janeiro								
D) Development of functional major programmatic curriculum and corporate partnerships in Finance and Marketing, modeled on current Management Science program	D.1. Establish an international marketing corporate advisory group  D.2 Establish an international finance corporate advisory group  D.3 Enhance IB/Functional Area curriculum based on the corporate advisory groups								

# CIBE Performance Measure Form (PMF)

## Undergraduate International Business and Functional Majors Programs (cont'd)

<b>1. Project Goal Statement:</b> Increase the number of students graduating from the University of South Carolina's Darla Moore School of Business Undergraduate International Business Major (with Double Major in Functional Area) by 25 percent during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
E) Develop additional undergraduate international business overseas short-term study abroad (STSA) programs, to include service-learning, research-intensive, location/functional area integrations, and "embedded" programs to complement the current "stand-alone" STSA programs	E.1 Collaborate with current international/global exchange partner institutions to assist with STSA course offerings  E.2. Recruit current USC business faculty to lead – especially with "embedded" programs – new STSA courses  E.3 Financially support students at MSIs to participate in the STSA programs								
F) Increase by 25% the number of students enrolled in all IB Undergraduate programs and STSA programs	F.1. Increase the number of direct admits to the IB Undergraduate program and cohort programs  F.2. Target and recruit current first- and second-year business students for the IB Major, cohort programs and STSA programs								

# CIBE Performance Measure Form (PMF)

## Outreach to Business/Government

1. Project Goal Statement: Increase CIBE outreach to U.S. businesses and government by 30% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
A) Develop and sponsor an ongoing program of Comparative Institutional Analysis of SE Cluster and Economic Development	A.1 Partner with SC Commerce Department and New Carolina  A.2. Develop teams of faculty, students, executives and policy leaders (organized by target clusters)  A.3. Examine parallel strategically important clusters in various country locations								
B) Support the development of the Export-Market Entry Studies Initiative	B.1 Partner with SC Small Business Development Center (SBDC)  B.2 Organize student teams to assess the market potential for SBDC products abroad, within a Global Competitive Strategy course  B.3. Collaborate with SBDC to market the course component as a central client service  B.4 Support database acquisition and other resources								

# CIBE Performance Measure Form (PMF)

## Outreach to Business/Government (cont'd)

1. Project Goal Statement: Increase CIBE outreach to U.S. businesses and government by 30% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
C) Offer open enrollment and customized firm-specific programs in International Business, increasing by 25% the enrollment of business executives	<p>C.1 Partner with the co-located Daniel-Mickel Center for Executive Education to host programs</p> <p>C.2. Develop, in collaboration with Moore School faculty, international courses upon request and/or in response to market opportunities</p> <p>C.3 Leverage CIBE research funding and subsequent research findings to increase the offerings of international business programs for the business and government community</p>								

# CIBE Performance Measure Form (PMF)

## National/Regional Outreach

1. Project Goal Statement: Increase CIBE outreach to previously underrepresented institutions by 50% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
<p>A) Develop and support an internationalization initiative for Minority-Serving Institutions (MSI) partners, via collaboration with GA Tech, Duke, Allen (MSI) and the Nine University and College International Studies Consortium of Georgia (MSI's)</p>	<p>A.1 Offer a no-cost FDIB pedagogical program for MSI partners in central location</p> <p>A.2 Conduct one-on-one mentoring partnerships between CIBE faculty and MSI faculty</p> <p>A.3 Offer no-cost overseas study program enrollment and/or STSA program enrollment for MSI faculty</p> <p>A.4 Provide support to MSI faculty in the design and implementation of their own STSA courses/programs</p> <p>A.5 Provide MSI students partial scholarship support to defray MSI STSA program expenses</p> <p>A.6 Organize and conduct a Research Paper Development Workshop for MSI consortium members, and, post-workshop, provide participating faculty travel stipends to present research</p>								

# CIBE Performance Measure Form (PMF)

## National/Regional Outreach (cont'd)

1. Project Goal Statement: Increase CIBE outreach to previously underrepresented institutions by 50% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
B) Organize and host an Annual Business Research Conference focused on Comparative Institutions and Governance Research	B.1 Rotate conference topics and chair to provide comprehensive coverage of research themes and programs  C.2 Disseminate research findings and advancing leading idea in IB to U.S. global competitiveness by engaging scholars from other institutions throughout the world								
C) Organize and host a Culture and Finance Conference	C.1 Collaborate with the <i>Journal of Corporate Finance</i> (special edition)  C.2 Assemble scholars prior to paper submission to promote and develop high-quality theoretical and empirical work								

# CIBE Performance Measure Form (PMF)

## National/Regional Outreach (cont'd)

1. Project Goal Statement: Increase CIBE outreach to previously underrepresented institutions by 50% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
D) Conduct and support an annual FDIB pedagogical program with five distinct seminars	<p>D.1 Conduct programs in (1) Survey of IB, (2) International Financial Management, (3) Global Operations and Supply Chain Management, (4) International Management and (5) International Marketing</p> <p>D.2 Provide scholarship assistance to MSI faculty, community college faculty and faculty from other underrepresented institutions to attend</p> <p>D.3 Provide a full scholarship for attendance designated for a faculty from our MSI partner, Allen Univ.</p>								
E) Develop new FDIB seminars/courses	E.1 Develop following new thematic courses: (1) International Business Negotiations, (2) Comparative Corporate Governance, (3) Comparative Institutional Systems and Varieties of Capitalism and (4) Islamic Economics, Finance and Management								

# CIBE Performance Measure Form (PMF)

## National/Regional Outreach (cont'd)

1. Project Goal Statement: Increase CIBE outreach to previously underrepresented institutions by 50% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
F) Conduct and support an annual FDIB Sub-Saharan Africa program	<p>F.1 Plan, manage and lead annual two-week overseas study tour for outreach faculty, especially from underrepresented institutions</p> <p>F.2 Collaborate with institutional sponsors to reach and support even larger number of MSI faculty</p> <p>F.3 Provide several full scholarships (program fee and airfare) to MSI consortium faculty for attendance</p>								
G) Conduct and support an annual FDIB-MENA program	<p>G.1 Plan, manage and co-lead annual two-week overseas study tour for outreach faculty, especially from underrepresented institutions</p> <p>G.2 Collaborate with institutional co-leaders UC-Denver and BYU to reach and support even larger number of MSI faculty</p> <p>G.3 Provide several full scholarships (program fee and airfare) to MSI consortium faculty for attendance</p>								

# CIBE Performance Measure Form (PMF)

## National/Regional Outreach (cont'd)

1. Project Goal Statement: Increase CIBE outreach to previously underrepresented institutions by 50% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
H) Support an annual FDIB-China/Hong Kong program	H.1 Co-sponsor an annual two-week overseas study tour for outreach faculty, especially from underrepresented institutions  H.2 Collaborate with program leader UC-Denver and other co-sponsors to reach and support even larger number of MSI faculty  H.3 Provide one full scholarship (program fee and airfare) to a designated MSI consortium faculty								
I) Organize, host and conduct an annual Workshop on Teaching Spanish for IB for Professors of Spanish	I.1 Provide IB instruction and Business Spanish curriculum development for participants  I.2 Provide a combination of partial and full scholarship stipends to outreach MSI, Community College and High School faculty instructors for attendance								

# CIBE Performance Measure Form (PMF)

## National/Regional Outreach (cont'd)

1. Project Goal Statement: Increase CIBE outreach to previously underrepresented institutions by 50% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
J) Sponsor and further develop the USC Summer Language Institute (SLI)	J.1 Support the development of additional languages offered by SLI  J.2 Provide annual scholarships to support student enrollment, with one annual scholarship designated to a student from our MSI partner school, Allen University								
K) Participate, as a Steering Committee Member, in the annual CIBE Business Language Conference	K.1 Provide annual sponsorship support to the conference host institution to reduce cost of program fee for participants  K.2 Provide travel stipends and program fee costs for two outreach faculty from underrepresented institutions to attend the annual conference								

# CIBE Performance Measure Form (PMF)

## National/Regional Outreach (cont'd)

1. Project Goal Statement: Increase CIBE outreach to previously underrepresented institutions by 50% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
L) Support, as a continuing member, the Consortium of Undergraduate International Business Education (CUIBE) and the Global Business School Network (GBSN)	L.1 Support the programs and outreach of the both organizations to (1) expand internationalization of the business curriculum and (2) support U.S. competitiveness in the global marketplace								
M) Collaborate with International Magnet Middle/High Schools	<p>M.1 Work with teachers to develop curriculum around globally-themed units, via an annual day-long workshop</p> <p>M.2 Provide students and teachers with a framework to compare institutional contexts, via the Moore School's IB Student Ambassador program</p>								

# CIBE Performance Measure Form (PMF)

## Research Themes

1. Project Goal Statement: Increase CIBE-supported international business research output by 25% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
A) Conduct research into the theme of Comparative Corporate Governance, Institutions and Global Strategy	A.1 CIBE-funded research project: State-Owned Enterprises and Private Benefits of Control: A Cross-National Extension of Principal-Principal Agency Theory								
	A.2 CIBE-funded research project: Family Firms: Key Determinants of Prevalence, Strategy and Profitability								
	A.3 CIBE-funded research project: Family Control and Corporate Social Responsibility: Evidence from East Asia								
	A.4 CIBE-funded research project: Business Groups and Socioeconomic Outcomes								

# CIBE Performance Measure Form (PMF)

## Research Themes (cont'd)

1. Project Goal Statement: Increase CIBE-supported international business research output by 25% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
B) Conduct research into the theme of Industry Clusters, Innovation and Global Competitiveness	B.1 CIBE-funded research project: Industry Clusters and Firm Strategy  B.2 CIBE-funded research project: Clusters: The Case of China and Impact on Global Competition  B3 CIBE-funded research project: Local Innovation for Competing in Global Markets  B.4 CIBE-funded research project: Transnational Regulatory Integration and Development								

# CIBE Performance Measure Form (PMF)

## Research Themes (cont'd)

1. Project Goal Statement: Increase CIBE-supported international business research output by 25% during the grant period when compared to the prior four-year period.									
2. Performance Measures	3. Activities	4. Data/ Indicators	5. Frequency	6. Data Source	7. Baseline and Targets				
					BL	T1	T2	T3	T4
C) Conduct research into the theme of Managing Global Political Risk and Legitimacy of MNC's – Africa Focus	C.1 CIBE-funded research project: Stakeholder Engagement in the Extractives Industry								
	C.2 CIBE-funded research project: Chinese Investment in Africa								
	C.3 CIBE-funded research project: Social Innovations Targeting Actors at the Bottom of the Pyramid: The Case of Mobile Money								
	C.4 CIBE-funded research project: Institutional Factors Affecting Diffusion of Mobile Money and Mobile Health across Sub-Saharan Africa								
D) Competitive International Business Research Program – CIBE Scholars	D.1 Award four research grants via open competition to faculty (to include MSI partner) on topics consistent with CIBE mandated activities								

## **CIBE Project Evaluation**

The main section of the narrative provides the overall framework for evaluation. In this supplemental section, the details of a number of planned evaluation projects are outlined. Each individual activity is given a code based on the main area of activity being evaluated (**e.g., EV1 represents activities associated with Graduate Programs Activities**). The second half of the code represents the activity being evaluated, and is coordinated with the program narrative (**e.g., Graduate 1 refers to the Master of International Business Dual Degree Program under 1.3. Graduate Programs**). As a reminder, the CIBE projects to be evaluated, as articulated and enumerated in the narrative section of the proposal, are:

### **EV1: Evaluation of Graduate Programs**

**EV1.1-Graduate 1. Master of International Business (MIB) Dual Degree Program** - The Master of International Business (MIB) is a unique interdisciplinary program that combines the development of international business expertise with an advanced understanding of international studies. It is designed to build on the international business, functional and language/culture skills developed in an undergraduate business program and facilitate further effective application of these skills through a richer appreciation of the cultural, sociopolitical and institutional settings within which global enterprises operate. The creation of four new Dual Degree programs in addition to the current two programs will enhance student Opportunities and competitiveness in the global market. The evaluation activities listed under this project include the existing two Dual Degree programs with Mannheim and ESCP, and will apply to the new initiative of the four new Dual Degree programs with Bocconi (2014-15), Koç (2015-16) and two other partners yet to be confirmed, scheduled for launch in 2016-17 and 2017-18).

The MIB program's learning goals include:

1. *Knowledge of global business operations*
2. *Knowledge of the diverse institutional arrangements around the globe*
3. *Understanding of the impact of government policies on business*
4. *Awareness of cultural diversity and its impact of business decisions*
5. *Integration of material from a variety of disciplines to solve business problems*

### **ASSESSMENT METHODS**

The assessment of learning goals will be collaboratively designed and evaluated by the International Business and Political Science departments. The learning goals will be assessed directly using course embedded approaches, including exams, case studies, essays and project assignments. Given our learning goals, include a broadened and integrative understanding of global business and government interactions, we will also include longer-term assessments of students taken several years after graduation. Finally, the program's goals will be assessed indirectly using data on placement and feedback from recruiters. All assessments of learning goals will be summarized in *The Annual Statistical Abstract of MIB Assessment* report. Each year, reports should be reviewed at Graduate Program Faculty Committee meetings. As a result of this review, the committee will make any recommendations for programmatic improvement or for modifications in learning goals and assessment practices that it deems to be warranted. These recommendations will also be shared with the Committee to Promote Teaching Effectiveness and Student Learning.

**EV1.1a-Graduate 1:** Analysis of "Country Analysis" project in IBUS 705: Sustaining the Global Enterprise

*IBUS 705: Sustaining the Global Enterprise* is a required course for all MIB students. Students complete a written assignment aimed at developing an understanding of the economic and cultural environments in





*POLI 710: Contemporary International Relations* is a required course for all MIB students. Students complete three written short essays. The essays focus on government and other institutions affecting global political and social issues within and across nations. Essays will be used to assess Learning Goals (2) and (3). A random sample of reports will be collected. The sample will consist of roughly ten reports for each learning goal. Reviewers with relevant expertise will evaluate the reports. The reviewers will be asked to complete a rubric to assess student learning. The rubric should be based on a five point scale and should provide the reviewers with well defined criteria to employ in their assessment. The course coordinator, consulting with colleagues in the Political Science Department will be responsible for developing the rubric and should supply teaching notes associated with the essay questions to assist the reviewers in their assessment. The Assessment Coordinator will be responsible for coordinating the review of the essay questions. The Coordinator will also be responsible for tabulating the numerical data provided by the reviewers, and summarizing their written comments. The Coordinator will submit this information in the form of a brief report to be included in the *Annual Statistical Abstract of MIB Assessment*.

Qualitative/Quantitative                      Summative    Internal

**EV1.1g-Graduate 1:** Post-graduation survey

Surveys of graduates will be conducted five years and ten years after graduation. The purpose of the survey will be to assess the how completing the MIB program has assisted graduates in achieving their career goals and the relevancy of the program’s curriculum to their careers. Input will also be sought on how the curriculum might be improved. The Assessment Coordinator will coordinate the development of any survey instruments to be used for assessment with the Alumni Relations and Dean’s offices. The Coordinator will also be responsible for summarizing all assessment survey results in the form of a report to be included in *The Annual Statistical Abstract of MIB Assessment*.

Qualitative/Quantitative                      Formative    External

**EV1.2-Graduate 2: International MBA (IMBA) Program Evaluation** - The evaluation activities listed under this project include the existing IMBA language tracks (Arabic, Chinese, French, German, Italian, Japanese, Portuguese and Spanish), and will apply to the new initiative of the Russian language track, scheduled for launch in 2016-17, which is designated as Graduate 3 in the narrative proposal. It also includes the activities under the proposed launch of the new IMBA Dual Degree Program with EGADE Business School in 2016-17, which is designated as Graduate 4 in the narrative proposal. And finally, it also includes the new IMBA Course Module on Cultural-Institutional Assessment, designated as Graduate 5 in the narrative proposal.

The following goals were adopted for the IMBA Program in 2005:

1. *Our students will acquire knowledge of business operations in a global setting. They will be able to recognize the opportunities and threats for individuals, companies and countries created by the growth of globalization.*
2. *Our students will be able make competent business decisions using creative decision-making skills that include analytical, global, ethical and culturally diverse dimensions.*
3. *Our students will be able to integrate the concepts, knowledge and skills they acquire from courses in the functional area of business. They will be able to deal with business problems from the integrated perspective of a business as a whole.*
4. *Our students will develop leadership skills to function successfully in a multicultural environment.*
5. *Our students will complete an extended internship outside their native country.*





2. *Understanding of international business through completion of an International Business concentration/major;*
3. *Expertise in a specific business discipline through meeting the requirements of a second major in a business discipline;*
4. *Understanding of the business practices of the United States, China and Asia;*
5. *Language proficiency in Mandarin Chinese at the Advanced Level;*
6. *Experience gained through program-sponsored internships in the United States and in China;*
7. *An understanding of both Chinese and American culture and civilization and their impact on the conduct of business, developed through two years of study in each country;*
8. *An understanding of the interaction of business and government in both China and the United States, the economic issues of the China-United States relationship, and the political ramifications of these issues, through academic work at both institutions.*

Similar objectives will be developed as part of the evaluation of the additional cohort programs developed. As most objectives are met through academic course work as part of the International Business major program, the methodologies of activities outlines in the Undergraduate Major in International Business below will include students in the cohort programs as they are developed. However, there are specific activities that will require separate evaluation.

**EV2.1a-Undergraduate 1-3: Language Testing for Cohort Programs** – Specific language level goals will be achievement for each cohort program and externally validated through testing vehicles such as ACTFL tests or specific business language tests.

Quantitative

Formative

External

## **EV2.2. Evaluation of the Undergraduate Major in International Business**

For each major, specific learning goals are developed. A combination of external and internal methods is used to determine whether such learning goals are met. In addition, a similar methodology is used to determine whether or not the learning goals for all undergraduate majors are met. In addition to these reports, which are used for subsequent action to make changes in the curriculum to enhance meeting of the specific learning goals, more general statistical information regarding participants in the program is gathered. Upon completion of the activities, the Assessment Coordinator is responsible for the collection and summary of all assessment data used to evaluate the Bachelor of Science program, International Business major. The Assessment Coordinator maintains a repository of the International Business Department assessment records and prepares reports of the results for review. These results are then passed on to the Department Chair of International Business who will review the data with the IB faculty. After the review, the International Business department will then prepare a report that will include any recommendations for programmatic improvement or modifications in learning objectives and assessment practices that the department deems to be warranted. A representative from the International Business department will then present any proposed changes will be to the Undergraduate Program Faculty Committee (UPFC) for review. The UPFC will then present the recommendations to Moore School faculty at a general faculty meeting.

The stated goals of the undergraduate International Business major are to develop, in addition to the overall business capabilities provided to all graduates:

1. *In Depth Capacity in a Functional Area of Business*
2. *Strong Understanding of the Global Dimensions of Business*
3. *Excellent Communications Skills in More than One Language*
4. *Appreciation of the Impact of Culture on the Conduct of Business*
5. *Exposure to Living in a Second Culture*





**EV2.2k-Undergraduate 1-7: Evaluation of Undergraduate IB Courses** - All courses in the Moore School are required to utilize the School’s teaching evaluation system, which features numerically scaled and open-ended questions.

Qualitative/Quantitative                      Summative    Internal

**EV3. Evaluation of Outreach Programs**

**EV3.1-Business 1: Consortium Assessment of Clusters and Economic Development** - The CIBE and the Moore School will coordinate with the consortium members, New Carolina and the SC Commerce Department, to develop tools to assess the effectiveness of this major initiative. .

Quantitative    Summative    External

**EV3.2-Business 2: Consortium of Export-Market Entry Studies Initiative** - The CIBE and the Moore School will coordinate with South Carolina Small Business Development Center (SBDC) to develop tools to assess the effectiveness of this major initiative. .

Quantitative    Summative    External

**EV3.3a-Business 3: Statistical Summary of Firm-specific and Open Enrollment Programs in International Business** - Each year the Daniel Management Center prepares a statistical report of its activities in executive education. A subsection of the report summarizing firm-specific programs with international content will be developed to identify the number of programs, hours of instruction, numbers of executives served, among other variables.

Quantitative    Summative    Internal

**EV3.3b-Business 3: Participant Evaluation of International Business Open Programs** – The open programs will be evaluated using exit surveys of the type previously described, with a combination of quantitative and qualitative questions. Questions regarding the usefulness and timeliness of the programs will be included on the survey, as well as questions seeking to identify useful topics for future programs.

Qualitative/Quantitative                      Summative/Formative    External

**EV3.4-Outreach 1: Minority-Serving Institutions (MSI) Internationalization Initiative.** CIBE will work with its MSI partner school consortium, as well as Georgia Tech and Duke, to develop an assessment of the MSI Internationalization Initiative, which includes (1) an FDIB pedagogical program, (2) mentorships involving curriculum and program development, (3) STSA programs, (4) faculty participation in FDIB overseas study tours, and (5) a Paper Development Workshop. The sub-activities listed above within the project will be evaluated as per the standards articulated for those activities listed elsewhere in this evaluation plan, as applicable.

Qualitative/Quantitative                      Summative    Internal/External

**EV3.5-Outreach 4: Additional FDIB Scholarship Assistance to Minority Serving Institutions.** CIBE will prepare a report detailing the number of participants in the FDIB program from Minority Serving

Institutions and will analyze the results of all surveys to determine if there is a positive or negative differential effect for faculty from these institutions.

Qualitative/Quantitative                      Summative                                      Internal

**EV3.6a-Outreach 5. Exit Evaluation of On-Campus FDIB Program, with new course offerings -** For the Survey of International Business course the specific goals are for participants (1) to be able to teach a survey course in International Business, and (2) to integrate international concepts in the other courses that they teach. For the five disciplinary FDIBs (International Finance, International Marketing, International Management, International Accounting and Global Operations and Supply Chain Management), the goals are for participants (1) to be able to teach the international disciplinary course, and (2) to become acquainted with the basic international issues in the discipline. The proposed new courses (International Business Negotiations, Comparative Institutional Corporate Governance, Comparative Institutional Systems and Varieties of Capitalism, and Islamic Economics, Finance and Management) will be evaluated with the same standards prescribed here. Upon completion of the course, each participant will provide a detailed evaluation of the overall program, including their overall experience, instructor performance, value of materials, and value of the program. These evaluations will use standard 1-5 rating scales.

Qualitative/Quantitative                      Summative                                      External

**EV3.6b-Outreach 5: Follow-up Participant Surveys of Impact on Teaching and Other Activities of FDIB Program -** In addition, to assess the long-term value of these programs to participants and to assess the impact of their participation, over the period of the grant CIBE will ask each participant to complete a questionnaire covering their experience at one and three year intervals subsequent to participation. Participants will be asked to identify how they have used the material covered in the FDIB course in the courses that they have taught since completion of the program. CIBE will seek to learn whether or not participants have been assigned to teach courses on the topic studied in the FDIB program, the enrollment in those courses, the extent to which they used materials furnished by the CIBEs, the extent to which international material has been incorporated into other courses taught by the participants. For the four new courses in the FDIB program, we will also track the number of new and infused courses on these topics introduced on the campus of participants. In addition to this quantitative impact data, CIBE will also seek to have the participants reevaluate the usefulness of the seminar, and provide a qualitative assessment of the impact of the course on their academic career.

Qualitative/Quantitative                      Summative                                      External

**EV3.7a-Outreach 6/7: Session Evaluations of Sub-Saharan Africa FDIB/MENA FDIB Programs -** The objectives of the program are as follows:

1. To increase faculty awareness of the business, economic, political, and cultural environment that exists in the named region.
2. To comprehend the significance and impact of the regional markets in the global economy and their potential importance as a market for US goods and services,
3. To initiate and strengthen academic, business, and governmental contacts in the regions to assist with current and future international business research,
4. To help faculty develop examples drawn from their FDIB experience and integrate them into their undergraduate and graduate business course.
5. To internationalize faculty via travel, study, and networking in a “less-than-commonly” visited region of the world.

Evaluation of this program is more complicated because it combines presentations by numerous outside presenters and experiential activities as well as more classic classroom settings. For this reason evaluation will take place at four levels. At the most basic level, each presentation or activity will be evaluated by participants at conclusion, using a combination of questions to which responses are structured to use standard 1-5 rating scales, as well as open-ended questions designed to develop qualitative data.

Qualitative/Quantitative                      Summative    External

**EV3.7b-Outreach 6/7: Exit Evaluation of Sub-Saharan Africa FDIB/MENA FDIB Programs** - The second level of evaluation of the program is an evaluation of the program as a whole and of the performance of the program leaders. This exit evaluation will be given immediately upon conclusion of the program, prior to return to the United States. In the month following the completion of each FDIB Africa program, the program leaders will prepare a report summarizing participant reactions to the program, as well as their assessment of the program’s effectiveness in achieving the goals of the program.

Qualitative/Quantitative                      Summative    Internal/External

**EV3.7c-Outreach 6/7: Consortium Evaluation of Sub-Saharan Africa FDIB/MENA FDIB Programs** - Since each consortium participant has specific goals for their participation in the program, it is important to determine whether or not these goals are being met. We are proposing that the Moore School CIBE hold a round-table discussion with representatives from other CIBE participants at the annual CIBE meeting to identify how the program can be improved.

Qualitative    Formative    External

**EV3.7d-Outreach 6/7: Follow-up Participant Surveys of Impact of Sub-Saharan Africa FDIB /MENA FDIB Programs on Teaching and Other Activities** - The general approach of this participant survey will be the same as the follow-up questionnaires given to participants in the FDIB Business courses, with appropriate changes because of the regional nature in the subject matter being taught.

Qualitative/Quantitative                      Summative    External

**EV3.8-Outreach 8: Follow-up Participant Surveys of Impact of Off-shore FDIB-China/Hong Kong Programs on Teaching and Other Activities** - The University of South Carolina sponsors participants to the annual FDIB-China/Hong Program led by the University of Colorado-Denver. While the primary evaluation of this program is the responsibility of the lead CIBE, we will survey the participants sponsored by the Moore School CIBE in the same fashion as we do those in the FDIB Africa programs, with questionnaires at one and three year intervals.

Qualitative/Quantitative                      Summative    External

**EV3.9a-Outreach 9: Exit Evaluation of the FDIB Spanish Workshop** - Evaluation of the CIBE Spanish language program (Years 2 through 4) is conditioned by the specific goals of the program, (1) to enable participants to teach “Spanish for Business” courses, and (2) to give participants a basic understanding of international business issues, particularly those affecting the Spanish-speaking Americas. Initial evaluation of the program will take place through utilization of an exit questionnaire analogous to that given to participants in the Business FDIB programs.

Qualitative/Quantitative                      Summative    External

**EV3.9b-Outreach 9: Follow-up Participant Surveys of Impact of FDIB Spanish Workshop on Teaching and Other Activities** - The general approach of this participant survey will be the same as the follow-up questionnaires given to participants in the FDIB International Business courses, with appropriate changes because of the differences in the subject matter being taught.

Qualitative/Quantitative                      Summative                                      External

**EV3.10-Outreach 11: CIBE Foreign Language Consortium Conference Evaluation** – As a steering committee member of the consortium, the South Carolina CIBE will have access to the host CIBE’s session by session and overall evaluations of the annual CIBE Foreign Language Conference.

Qualitative/Quantitative                      Formative                                      External

**EV4: Evaluation of Research Activities**

Research evaluation in the Moore School CIBE involves two dimensions. The first is the active solicitation and review of research proposals from the faculty of the Moore School and other academic units at the University of South Carolina. The second is the evaluation of the research product arising from funded projects.

**EV4.1 Research Theme 1 through Research Theme 3 - Statistical Summary of CIBE Research Activities** – The Research Director of CIBE shall prepare an annual statistical summary of CIBE-sponsored thematic research. The summary will include the following information about thematic research awards presented by CIBE:

1. Number and Title of Proposals received, characterized
  - a. By department/unit/institution
  - b. By amount of funds requested
  - c. By thematic preference priority
2. Number and Title of Proposals funded, by same characterizations

In addition, the Summary should contain ongoing information regarding the product of CIBE-sponsored research appearing in the grant year:

1. Working Papers submitted to CIBE
2. Manuscripts submitted for scholarly publication in the grant year, by journal
3. Manuscripts accepted for scholarly publication in the grant year, by journal
4. Sponsored articles in print, by journal
5. Publication of CIBE sponsored research (books, proceedings, practitioner journals, etc.)
6. Presentation of CIBE sponsored research at scholarly meetings, characterized by type of meeting (national or international association, regional association, invited presentation at special conference, etc.)

Quantitative                                      Summative                                      Internal/External

**EV4.2. Competitive International Business Research Program: CIBE Scholars - Statistical Summary of CIBE Research Activities** – The Research Director of CIBE shall prepare an annual statistical summary of CIBE- sponsored research. The summary will include the following information about competitive research awards presented by CIBE:

1. Number and Title of Proposals received, characterized
  - a. By department/unit/institution
  - b. By amount of funds requested
  - c. By competitive and invitational preference priority
2. Number and Title of Proposals funded, by same characterizations

In addition, the Summary should contain ongoing information regarding the product of CIBE-sponsored research appearing in the grant year:

1. Working Papers submitted to CIBE
2. Manuscripts submitted for scholarly publication in the grant year, by journal
3. Manuscripts accepted for scholarly publication in the grant year, by journal
4. Sponsored articles in print, by journal
5. Publication of CIBE sponsored research (books, proceedings, practitioner journals, etc.)
6. Presentation of CIBE sponsored research at scholarly meetings, characterized by type of meeting (national or international association, regional association, invited presentation at special conference, etc.)

Quantitative

Summative

Internal/External

**EV5. External Evaluation by International Business Scholars** – The CIBE will invite scholars during year 3 of the grant cycle to visit the campus and provide an external evaluation on any and all programs and projects of the USC CIBE.

Qualitative/Quantitative

Summative/Formative

Internal/External

## CIBE Project Evaluation Chart

Evaluation Code	Activity Code	Evaluation Activity	Type	Pu
EV1.1a	Graduate 1	Analysis of "Country Analysis" project	Quantitative	Sun
EV1.1b	Graduate 1	Analysis of Essays in Sustaining the Global Enterprise Course	Quantitative	Sun
EV1.1c	Graduate 1	Analysis of "Negotiations Journals"	Quantitative	Sun
EV1.1d	Graduate 1	Analysis of Essay in Nation States, Regional Networks and Global Market Course	Quantitative	Sun
EV1.1e	Graduate 1	Analysis of Essays Comparative Institutional Systems Course	Quantitative	Sun
EV1.1f	Graduate 1	Analysis of Contemporary International Relations Course	Qualitative/Quantitative	Sun
EV1.1g	Graduate 1	Post Graduation Survey of MIB Graduates	Qualitative/Quantitative	Fo
EV1.2a	Graduate 2	IMBA Student Exit Report	Qualitative	Sun
EV1.2b	Graduate 2	Annual IMBA Placement Report	Quantitative	Sun
EV1.2c	Graduate 2	IMBA Annual Questionnaires	Qualitative/Quantitative	Sun
EV1.2d	Graduate 2	Employer Evaluations of IMBA Student Internship Performance	Qualitative/Quantitative	Sun
EV1.2e	Graduate 2	Evaluation of IMBA Regional/Country Courses	Qualitative/Quantitative	Sun
EV1.2f	Graduate 2	External Testing of IMBA Students Foreign Language Skills	Quantitative	Sun
EV1.3a	Graduate 8	One Year MBA Dual Degree Program Student Exit Report	Qualitative	Sun
EV1.3b	Graduate 8	Annual MBA Placement Report	Quantitative	Sun
EV1.3c	Graduate 8	One Year MBA Alumni Questionnaires	Qualitative/Quantitative	Fo
EV2.1a	Undergraduate 1-3	Language Testing for Cohort Programs	Quantitative	Fo
EV2.2a	Undergraduate 4	Evaluation of In-Depth Capacity in a Functional Area of Business	Quantitative	Summati
EV2.2b	Undergraduate 4	Evaluation of Strong Understanding of the Global Dimensions of Business	Quantitative	Summati
EV2.2c	Undergraduate 4	Evaluation of Communication Skills in More than One Language	Quantitative	Summati
EV2.2d	Undergraduate 4	Evaluation of Appreciation of the Impact of Culture on the Conduct of Business	Quantitative	Summati
EV2.2e	Undergraduate 4	Evaluation of Exposure to Living in a Second Culture	Quantitative	Summati
EV2.2f	Undergraduate 4	Statistical Analysis of the Undergraduate Major in IB	Quantitative	Sun
EV2.2g	Undergraduate 4	Undergraduate Major Admissions Report	Quantitative	Sun
EV2.2h	Undergraduate 4	Report of the Undergraduate Student Advisory Committee	Qualitative	Sun
EV2.2i	Undergraduate 4	Undergraduate Major Exit Survey and Placement Report	Qualitative/Quantitative	Sun
EV2.2j	Undergraduate 4	Undergraduate Major Alumni Survey	Qualitative/Quantitative	Fo
EV2.2k	Undergraduate 1-7	Evaluation of Undergraduate IB Courses	Qualitative/Quantitative	Sun
EV3.1	Business 1	Consortium Assessment of Clusters and Economic Development	Quantitative	Sun
EV3.2	Business 2	Consortium of Export-Market Entry Studies Initiative	Quantitative	Sun
EV3.3a	Buisness 3	Statistical Summary of Firm-Specific and Open Enrollment Programs in IB	Quantitative	Sun
EV3.3b	Business 3	Participant Evaluation of International Business Open Programs	Qualitative/Quantitative	Summati

### CIBE Project Evaluation Chart (cont'd)

EV3.4	Outreach 1	Minority-Serving Institutions (MS) Internationalization Initiative	Qualitative/Quantitative	Summative
EV3.5	Outreach 4	Additional FDIB Scholarship Assistance to Minority-Serving Institutions	Qualitative/Quantitative	Summative
EV3.6a	Outreach 5	Exit Evaluation of On-Campus FDIB Program	Qualitative/Quantitative	Summative
EV3.6b	Outreach 5	Follow-up Participant Surveys of Impact on Teaching and Other Aspects of FDIB Program	Qualitative/Quantitative	Summative
EV3.7a	Outreach 6/7	Session Evaluations of Sub-Saharan Africa FDIB / MENA FDIB Programs	Qualitative/Quantitative	Summative
EV3.7b	Outreach 6/7	Exit Evaluations of Sub-Saharan Africa FDIB / MENA FDIB Programs	Qualitative/Quantitative	Summative
EV3.7c	Outreach 6/7	Consortium Evaluation of Sub-Saharan Africa FDIB / MENA FDIB Programs	Qualitative	Formative
EV3.7d	Outreach 6/7	Follow-up Participant Surveys of Impact on Sub-Saharan Africa FDIB / MENA FDIB Programs on Teaching and Other Activities	Qualitative/Quantitative	Summative
EV3.8	Outreach 8	Follow-up Participant Surveys of Impact on Off-Shore FDIB-China Hong Kong Program on Teaching and Other Activities	Qualitative/Quantitative	Summative
EV3.9a	Outreach 9	Exit Evaluations of the FDIB Spanish Workshop	Qualitative/Quantitative	Summative
EV3.9b	Outreach 9	Follow-up Participant Surveys of Impact of FDIB Spanish Workshop on Teaching and Other Activities	Qualitative/Quantitative	Summative
EV3.10	Outreach 11	CIBE Foreign Language Consortium Conference Evaluation	Qualitative/Quantitative	Formative
EV4.1	Research Theme 1-3	Statistical Summary of CIBE Research Activities	Quantitative	Summative
EV4.2	Competitive Research	Competitive International Business Research Program: CIBE Scholars	Quantitative	Summative
EV5	All	External Evaluation by International Business Scholars	Qualitative/Quantitative	Summative

## **Supplemental Narrative Attachment**

- Master of International Business (MIB) Brochure
- Bocconi/Moore School Dual Degree Brochure
- IBCE Brochure
- FDIB Brochure
- FDIB-Sub-Saharan Africa Brochure
- New Carolina Brochure

# MIB Curriculum

The curriculum of the MIB Program consists of at least 10 academic classes designed to expose students to the challenges of working in culturally and economically diverse business environments. Students are required to complete five core courses covering such topics as international business negotiations and global markets; two international business electives exploring such topics such as international management and global competitive analysis; two thematic political science electives covering areas such as economics and law, and one regional/foreign policy course which gives them a deeper understanding of a particular region of the world.

## Core Requirements (15 hours)

IBUS734	<b>International Business Negotiations. (3)</b> An advanced examination of how decision makers in business and government settings manage the process and outcomes of negotiations. Cross-cultural negotiations in a global business environment.
IBUS705	<b>Sustaining the Global Enterprise. (3)</b> Examines the management of strategic, structural, and informal processes within multinational corporations and how to lead a global workforce.
IBUS706	<b>Nation States, Regional Networks and Global Markets. (3)</b> Introduces conceptual frameworks to understand globalization and the changes taking place in the international political economy, and the interactions of governments and global organizations.
IBUS707	<b>Comparative Institutional Systems. (3)</b> Introduces conceptual perspectives for understanding economic events in the global economy; and a comparative view of national institution-based systems.
POLI710	<b>Introduction to International Relations. (3)</b> An introduction to the field of international relations, including causes of war, world order, international distribution of wealth, durability of state system, and the individual in the world system.

## International Business Electives\* (6 hours)

IBUS711	<b>Global Corporate Valuation. (3)</b> Application of key corporate valuation models in evaluating different business situations facing multinational corporations.
IBUS713	<b>Global Financial Markets. (3)</b> Advanced issues in the structure of global financial markets, including the Eurobond, foreign bond, syndicated credit, Euronote, and swap markets.
IBUS715	<b>Foreign Market Entry and Growth. (3)</b> International market selection, foreign market entry, and growth and regional expansion strategies.
IBUS716	<b>Cross-border Alliances and Joint Ventures. (3)</b> Strategic management of cooperative strategies (e.g., joint ventures, strategic alliances, cooperative agreements).
IBUS718	<b>Consulting and Organizational Development in MNCs. (3)</b> Restructuring and transformation initiatives within multinational organizations as internal consultants and/or change agents.
IBUS732	<b>Comparative Management. (3)</b> Cross-cultural analysis of management theory and practice in select countries and regional markets.
IBUS735	<b>International Mergers and Acquisitions. (3)</b> Practical skills to effectively transact international mergers and acquisitions. Focus given to essential strategic, financial, organizational and legal factors.
IBUS736	<b>Strategic Management of Global Supply Chains. (3)</b> Strategic frameworks for designing and managing global supply chains, including management of operational practices from an international perspective.
IBUS738	<b>International Business and Sustainable Development. (3)</b> An introduction to international environmental and social management issues that affect an organization's sustainable development initiatives.
ECON705	<b>Economic Development. (3)</b> Overall view of problems of economic development, including its history and relationship to the modern world. Brief consideration is given to such noneconomic factors as political, sociological, and cultural environments. Basic theories of growth are presented and critically evaluated.



# MIB Curriculum

## International Studies (International Relations/Comparative Politics) Electives\* (6 Hours)

POLI719	<b>Politics and Social Change. (3)</b> Systematic survey, analysis, and comparison of major contemporary theoretical works on political and social change.
POLI724	<b>Religion and Politics. (3)</b> Religion as a factor in the comparative politics and international relations of states and societies.
POLI733	<b>International Organization. (3)</b> Examination of theoretical and substantive problems relating to the development and functioning of international intergovernmental and nongovernmental organizations.
POLI734	<b>Economics of International Politics. (3)</b> Study of the international political significance of economic issues relating to monetary reform, trade, aid, and economic development.
POLI737	<b>Nationalism and Politics. (3)</b> Seminar on the politics of nationalism from both the political sociology and international relations perspectives.
LAWS784	<b>Transnational Law (3)</b> A survey course focusing on the actors, sources, and principles of international and transnational law.

## Foreign Policy Elective\* (3 hours)

POLI731	<b>Government and Politics of Latin America. (3)</b> This course examines the nature of democracy and democratic transitions, the relationship between economic and political development, and the causes and effects of different economic development strategies in Latin America.
POLI746	<b>Chinese Foreign Policy. (3)</b> A seminar on the Chinese tradition in foreign policy and the foreign policies of the Republic of China and the People's Republic of China, emphasizing the impact of domestic Chinese affairs on their foreign relations in the post-World War II period.
POLI747	<b>Japanese Foreign Policy. (3)</b> A seminar on the foreign policy of Japan with emphasis on the post-World War II period and on the analysis of Japanese objectives and capabilities in international relations.
POLI749	<b>International Relations of the Middle East. (3)</b> Foreign policies and international relations of the Middle East, focusing on relations within the region and with the West and Soviet bloc.
POLI781	<b>Government and Politics of Japan. (3)</b> Explores the key institutions, actors, and processes of contemporary Japanese domestic politics.
POLI782	<b>Problems in Chinese Government and Politics. (3)</b> The Chinese political tradition as it has merged with Communist theory and practice with special attention to problems of regionalism, localism, and central planning.
POLI783	<b>Dynamics of Middle East Politics. (3)</b> The comparative politics of the Arab countries and inter-Arab relations. Comparative analysis is used to study common political problems (authority, participation, integration) and political structures. Aspects of inter-Arab relations analyzed include: Arab unity, the Israeli conflicts, and East-West competition.
POLI784	<b>Government and Politics of Europe. (3)</b> Seminar in European politics. Themes include party systems and voting behavior, parliamentary politics, public policy, democratization and privatization in Central and Eastern Europe, and research on the European Union.
POLI 785	<b>Contemporary Russian Politics. (3)</b> An examination of current domestic issues in Russia and other states of the former Soviet Union, focusing on the institutions, processes, and results of policy decisions.

\* Courses are offered in varying semesters and are subject to change.



Sonoco International Business Department  
**Darla Moore School of Business**  
University of South Carolina

# Master of International Business

## Double Degree Program

with **BOCCONI UNIVERSITY**  
Milano, Italy



UNIVERSITY OF  
**SOUTH CAROLINA**  
Darla Moore School of Business

PR/Award # P220A140021

Page e187



Founded in 1919, the Moore School of Business is a recognized leader in international business research and education. We are currently:

- #1 in the undergraduate international business specialty in the survey of 'America's Best Colleges' – U.S. News & World Report
- #1 MBA program for international business – U.S. News & World Report
- #1 undergraduate international business program – Bloomberg Businessweek 2013 Best Undergraduate B-school rankings
- #1 international business faculty for research productivity in the Journal of International Business Studies

## Producing World-Class Leaders for the Global Business Environment

For more than 90 years, the Darla Moore School of Business has provided an outstanding business education to students who have gone on to become leaders in every business sector. Known worldwide for its top-ranked programs in international business, the Moore School is home to a globally renowned faculty and eight major research centers. The Moore School is committed to educating tomorrow's global business leaders and to playing a central role in the economic growth of the state by bringing the world to South Carolina, and South Carolina to the world.



## The Master of International Business Program

Effective leaders in today's converging global economic climate must possess a broad, interdisciplinary understanding of how multinational enterprises interact with political, sociocultural and economic environments worldwide. Recognizing this trend, the Darla Moore School of Business and the Sonoco International Business Department have leveraged their positions as leaders in international business education and research to create the Master of International Business (MIB) program to develop the next generation of international business leaders.

The MIB program aims to develop adaptable, flexible leaders through an intensive, dynamic, and wide-ranging course of studies. Students in the program partake in courses across a variety of disciplines including International Business, Political Science, Law, Anthropology, and more. Students also have the opportunity to design a highly specialized and flexible curriculum with an emphasis on specific areas of global business. Part of this customization involves the opportunity to pursue a MIB Double Degree at one of our internationally renowned partner universities in Paris, Milan, Mannheim or Istanbul.



Thomas Cooper Library



# The Master of International Business Double Degree Program

The one-year, MIB curriculum consists of 30 credit hours, including 15 hours of core courses and 15 hours of electives in the fields of international business, political science, law and more. Core courses include topics such as Sustaining the Global Enterprise; Nation States, Regional Networks and Global Markets; and International Business Negotiations. The International Business electives cover topics such as International Mergers and Acquisitions, Strategic Management of Global Supply Chains and Foreign Market Entry and Growth. Courses from our partners in the Political Science Department and School of Law include Nationalism and Politics, Dynamics of Middle East Politics, and Transnational Law.

While the one-year MIB degree focuses on integrating the political, economic and cultural aspects of global business, our Double Degree program provides students with the opportunity to earn a second Master degree from one of our global partners, including the Grande École ESCP Europe (Paris, France); Koç University (Istanbul, Turkey); the University of Mannheim (Mannheim, Germany); and Bocconi University (Milan, Italy). Students in the Double Degree program have the opportunity to spend two semesters abroad at one of our partners, as well as two semesters at the Moore School. After two years of studies, graduates of the Double Degree program will have earned two masters degrees from two different universities in two countries. Our partners offer academic programs which enhance the one-year MIB program by focusing on functional business areas such as marketing, finance, or international management amongst others. The Double Degree program provides students with a truly unique, international academic and professional experience to distinguish themselves in the global marketplace.

# MIB



# Bocconi University

Milano, Italy

## Program Overview



Today, globalization is no longer an option, but a strategic imperative for all companies, regardless of their size or industry. Based on this premise, the MSc in International Management program (MIM) at Bocconi provides students with the knowledge and understanding of management concepts and theories as well as practical skill sets and tools to address this challenge. A cornerstone of the Bocconi MIM program is the connection and integration of theoretical, academic education with practical, business expertise to provide students with keen insights into management best practices.

The MIM curriculum provides a complete overview of issues involved in the operative and strategic management of companies on a global scale. Integrating innovative, interdisciplinary courses with topical business seminars and real case studies, the MIM program develops a student's ability to survive and thrive in a the general international context while also developing their specific expertise within functional business areas such as international management, marketing, corporate finance, labor management, operations and supply chain. This development of expertise in a functional business area alongside a thorough understanding of the larger, global business environment provided by the MIB program equips students with a truly unique skill set to distinguish themselves in an international setting.



# Bocconi University

## Master in Management Program

### Curriculum



After completing the first two semesters of the MIB program in Columbia, South Carolina, students travel to Milan and follow Bocconi's Laurea Magistrale (M.Sc.) in the International Management program to complete 60 European Credit Transfer and Accumulation System (ECTS) (equivalent to 30 USC credit hours). Coursework during this program includes such topics as International Finance, International Economic and Business Dynamics, Quantitative Methods for Management, and Marketing Decisions. The modular program structure of the MIM allows students to gain the skill sets of a managing director or CEO, while also developing specialized knowledge in an industry segment (e.g. fashion and design, management consulting) or a functional area (e.g. international marketing, international finance) of their choice. Students also complete language courses, a thesis and an internship during the MIM program.

**Language Training:** Students at Bocconi must pass two foreign language exams. Both must be based on official languages of the European Union and must not include the student's mother tongue. If Italian is not a student's native tongue, one of the foreign languages acquired must be Italian. Furthermore for native English speakers, knowledge of German, Portuguese, Spanish or French at the minimum level of B2 business or higher is required to pass the second language exam.

**Thesis:** A thesis is required as part of the MIM program and will be completed during the second semester of studies at Bocconi. All students will defend their thesis at Bocconi during the graduation sessions available throughout the year.

**Internship:** Students must complete a full-time internship of at least 10 weeks (paid or unpaid) during their enrollment in the MIB and MIM double degree program. The internship can be carried out in Italy, the USA or anywhere in the world, preferably in the break between Year 1 and Year 2. The internship will have to be formally recognized and accepted by the MIM program at Bocconi. Students will have access to career services at both USC and Bocconi to assist in securing an internship and any necessary work permits to complete this internship.



# Bocconi University Master in Management Program

## Student Profile



**Bocconi**  
Università Commerciale  
Luigi Bocconi

Bocconi's MIM curriculum is designed to build upon a solid business foundation with both a quantitative and qualitative focus. Thus, potential students are required to have earned an undergraduate degree in a business field in order to qualify for the program. It is also strongly recommended that students have proficient language skills in at least one European language (other than English) before joining the Bocconi program. Students should also be highly interested in launching an international career through the development of advanced quantitative skills, managerial expertise, and language capabilities to kick-start their international career.

Università Bocconi, founded in 1902, became the first Italian university to grant a degree in economics. More than a century later, Bocconi continues to play a leading role in Italy's social and economic modernization. It has remained true to its founding values of being a major research university and has also expanded its reputation to become a global leader in business research and academics.



UNIVERSITY OF  
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Darla Moore School of Business

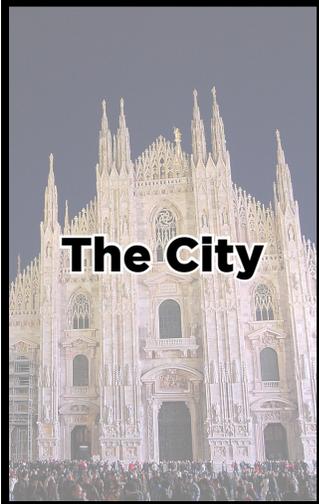
# Careers

Students graduating from the MIM and MIB programs have found jobs in a variety of industries and at a multitude of highly-renowned companies. Large multinational firms seeking expertise in cross-border management have been key employers of graduates from Bocconi and the Moore School. Students graduating from the MIM and MIB programs typically pursue careers with an international outlook in the following fields:

- Consulting firms, in particular for tasks involved in cross-border consulting projects
- Small and medium enterprises (SMEs), as business development managers, export managers or expatriate managers to contribute to the expansion of the SME in foreign markets
- Research centers and educational institutions which require systemic and inter-functional knowledge of how firms operate
- Government agencies from their home countries or international NGO's looking for cross-cultural expertise

The top 25 recruiters of Bocconi and Moore School graduates include, among others: Bain & Company, Bank of Communications, Capgemini, Citi, Deloitte Consulting, General Electric, Goldman Sachs, Google, HSBC, L'Oréal, Luxottica, McKinsey & Company, Nestlé, Procter & Gamble, PwC Advisory, Reckitt Benckiser, Rocket Internet, Roland Berger Strategy Consultants, The Boston Consulting Group, Unilever, and Vodafone.



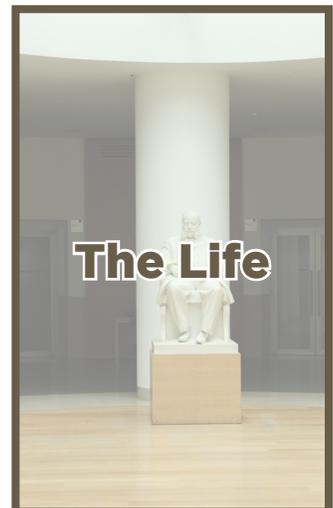


From the dominating, iconic façade of the Duomo di Milano to the cutting-edge fashion boutiques and restaurants, Milan has something to offer everyone. Milan encompasses the heart of Italy's industrial, financial and commercial centers. The University of Bocconi is located in the heart of the city, providing students with a plethora of activities to enjoy both in and outside the classroom.



Founded in 1902, the University of Bocconi has been a leading academic institution in Europe, and the world, for more than a century. It was the first Italian university to grant a degree in economics, and has continued in this role at the forefront of research and education inside of Italy and the world. Bocconi has a long history of playing a leading role in Italy's social and economic modernization as well as being a major contributor to global business research and development.

Students at Bocconi will join an international community that blends progress and innovation with a lively cultural and academic environment. From shopping to art galleries to theatres, Milan lives up to its reputation as Italy's leader in fashion, finance and design.



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**[moore.sc.edu/mib](http://moore.sc.edu/mib)**

Jun 2014 - CB



Darla Moore School of Business

**International Business**

University of South Carolina

Chinese University of Hong Kong

# International Business and Chinese Enterprise



UNIVERSITY OF  
**SOUTH CAROLINA**  
Darla Moore School of Business

PR/Award # P220A140021

Page e197



**IBCE** majors learn to thrive in the Chinese business environment.

### Program overview

The International Business and Chinese Enterprise program is an intensive four year course of study that develops undergraduate students into professionals who can operate and succeed in the Chinese business environment.

Each year, twenty University of South Carolina (USC) students create a network with twenty Chinese University of Hong Kong (CUHK) students to form a cohort group. Students from South Carolina will participate in an intensive study of Mandarin Chinese (Putonghua) for two summers, one in Hong Kong and the other in Beijing. Over the course of the four-year program of study, students may also pursue internships in the summer months spent in their home country, with linked opportunities for graduate study. Cohort students take some classes together while at CUHK and continue to move between institutions together.



## co-hort

***/'kōhōrt/***

a group of students who become connected through years of study together.

### **Classmates today, networked for life.**

- Students move between institutions together, learning valuable teamwork and networking skills by relying on their peers for support while navigating a new country.
- Every year the group takes at least one class together, allowing them to connect inside the classroom through teamwork and analytical thinking.
- All students get to share in the diversity in the cohort through other classes and trips together.

## **South Carolina**

### **YEAR 1**

USC students receive a true freshman year college experience while making progress in Mandarin Chinese. Students take general education courses from USC and take courses to develop their language skills from the start.

Summer: As soon as their first year ends the students head to Hong Kong to participate in intensive Mandarin (Putonghua) language instruction at the Yale-China Chinese Language Centre at the Chinese University of Hong Kong.

## **Hong Kong & Beijing**

### **YEAR 2**

Fall/Spring: Students from both Universities meet and form a cohort. Curriculum at CUHK includes courses that satisfy core business requirements at USC and additional Chinese language courses.

Summer: Students spend the summer in China participating in both the pragmatic internship (PRINCH) and the summer language program at the Beijing Language and Culture University.

## **South Carolina**

### **YEAR 3**

At USC, students take Globalization and Business (IBUS 310) together as a cohort. Additional courses focus on functional and thematic international business issues. During the summer following the third year, students have the option to participate in an internship, research, or service opportunity.

### **YEAR 4**

## **Hong Kong & South Carolina**

All IBCE students return to Hong Kong during the Fall semester. The final semester of the program may be completed at either South Carolina or CUHK. After graduation, selected students may continue their education through the fifth year Master of International Business program at USC.



## Chinese University of Hong Kong

**“To Combine Tradition with Modernity To Bring Together China and the West.”**

Founded in 1963, The Chinese University of Hong Kong (CUHK) is a forward-looking comprehensive research university with a global vision. CUHK distinguishes itself among local universities by virtue of a rich Chinese cultural heritage, a bilingual and bicultural tradition, and a unique collegiate system that maintains close ties with important seats of learning both in Mainland China and overseas. The quality of research and teaching enjoys recognition worldwide. CUHK teachers and students hail from all corners of the world. In 2007, there were more than 5,800 staff members and some 20,000 undergraduate and postgraduate students. Of these students, about 3,000 are from 45 countries and regions outside Hong Kong. Over 100,000 alumni are connected through some 80 alumni associations both within and outside Hong Kong.



## University of South Carolina

**“Developing transnational mindsets for a changing world.”**

The University of South Carolina enrolls more than 45,000 students at eight campuses across the state with the flagship campus being USC-Columbia. More than 4,000 undergraduate and almost 1,000 master and doctoral students attend the Darla Moore School of Business—the second largest division of the University of South Carolina- Columbia. Since 1919, innovation has been critical to the success of the University of South Carolina’s Moore School of Business. The school has a history of staying attuned to ever-changing global markets by linking business and language courses with overseas study experiences. Our relationship with The Chinese University of Hong Kong offers a particularly exciting opportunity for students who want to focus on China as the gateway to business between the U.S. and the expanding Asian markets.

## Double Major

In addition to receiving a strong international business education, students are also required to take a second major in order to develop valuable functional skills. Students may double major in:

- Accounting
- Economics
- Finance
- Management
- Management Science
- Marketing
- Real Estate
- Risk Management and Insurance

## Language and Culture

To enhance their communication across cultures, students become as proficient as possible in Mandarin Chinese (Putonghua).

- Language courses taken in academic year at USC and CUHK to improve proficiency.
- First summer study will take place at the Yale-China Chinese Language Centre at the Chinese University of Hong Kong.
- Second summer study will take place at Beijing Language and Culture University.



## Admission

Admission to the International Business and Chinese Enterprise Program at the Darla Moore School of Business is highly competitive and enrollment is limited to 20 students per year at each school. Due to the strenuous academic curriculum at both CUHK and USC, students selected for the program must have high quantitative skills and a strong academic preparation from high school. Students who have completed or are currently enrolled in a college calculus course through AP/IB/Dual Enrollment coursework will be given preference in the admissions process.

### **The application process for prospective high school students interested in entering the IBCE program:**

The online application is comprised of essay questions on subjects such as your interest in their program, career goals, global/cultural experiences, language ability, etc. A short video upload is also required. Due to the four-year structure of the program, we do not accept transfer students or current USC upperclassmen.

#### **1. Apply to USC through the Office of Undergraduate Admissions.**

All University admissions deadlines must be observed for IBCE consideration.

#### **2. Complete Moore School of Business Cohort Application Online by March 1.**

The online application consists of essay questions. The Admissions Committee may also request a recorded video statement or telephone interview, if necessary.

#### **3. Admission Decision in mid-to-late March.**

Students are notified via postal mail of their admission decision.

#### **4. Admitted students will submit an Enrollment Deposit by May 1 to the Office of Undergraduate Admissions as well a Program Expectations & Agreement Form to the Moore School of Business.**



**“We are educating future global business leaders within an original and practical format of study across regions. They will be uniquely qualified to contribute to organizations and enterprises in the North American and Chinese business environments. The capacity to function within and across cultures will prove to be of great enduring value over the course of their careers.”**

Dr. David Hudgens  
Regional Director- Asia Pacific  
Office of International Activities  
Moore School of Business



## Affordability

Annual Tuition and Fees while attending the University of South Carolina

Expense	US Dollars
Tuition and Technology Fee	\$10,791 in-state (resident) \$28,461 out-of-state (nonresident)
Housing: traditional, suite	\$5,998 (resident/ nonresident)
Meals: 10-21 meal plan	\$2,921 (resident/ nonresident)
Business School Enhancement Fee	\$850 per semester
Books and supplies	\$994(average)

Annual Tuition and Fees while attending the Chinese University of Hong Kong

Expense	US Dollars
Tuition and Technology Fee	\$10,791 in-state (resident) All Students pay resident rate while on exchange.
Housing at CUHK	\$1,347-\$1,384
Books and Supplies	\$250-\$400
Business School Enhancement Fee	\$850 per semester
Mandatory Emergency Medical Insurance	\$360

\*\*Based on 2013-2014 rates; All fees listed above subject to annual university rate increases

\*\*Students should expect additional costs including but not limited to: airfare to and from Hong Kong, local transportation, local cell phone plan, mainland China visa, and required group travel expenses

Tuition and Fees while attending the first summer language training at the Yale-China Chinese University of Hong Kong

Expense	US Dollars
Program Fee: USC in-state Tuition for 12 credits	\$5,208 (\$434 per credit)
Housing	\$1000-\$2000
Books and supplies	\$75

Tuition and Fees while attending the second summer language training at Beijing Language and Culture University

Expense	US Dollars
Inclusive Program Fee: Housing, Language Courses, Cultural Events	\$4,500-\$8,670 (variation in price based on choice of living accomodation-dorm vs. premium apartment)

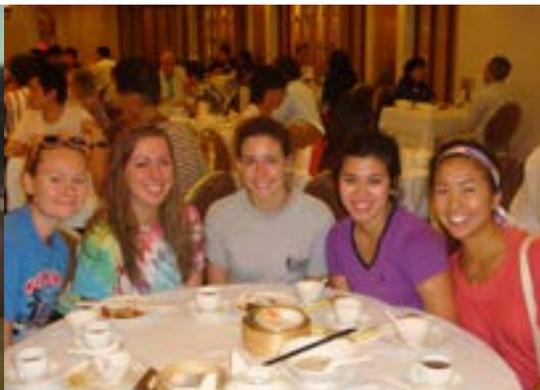


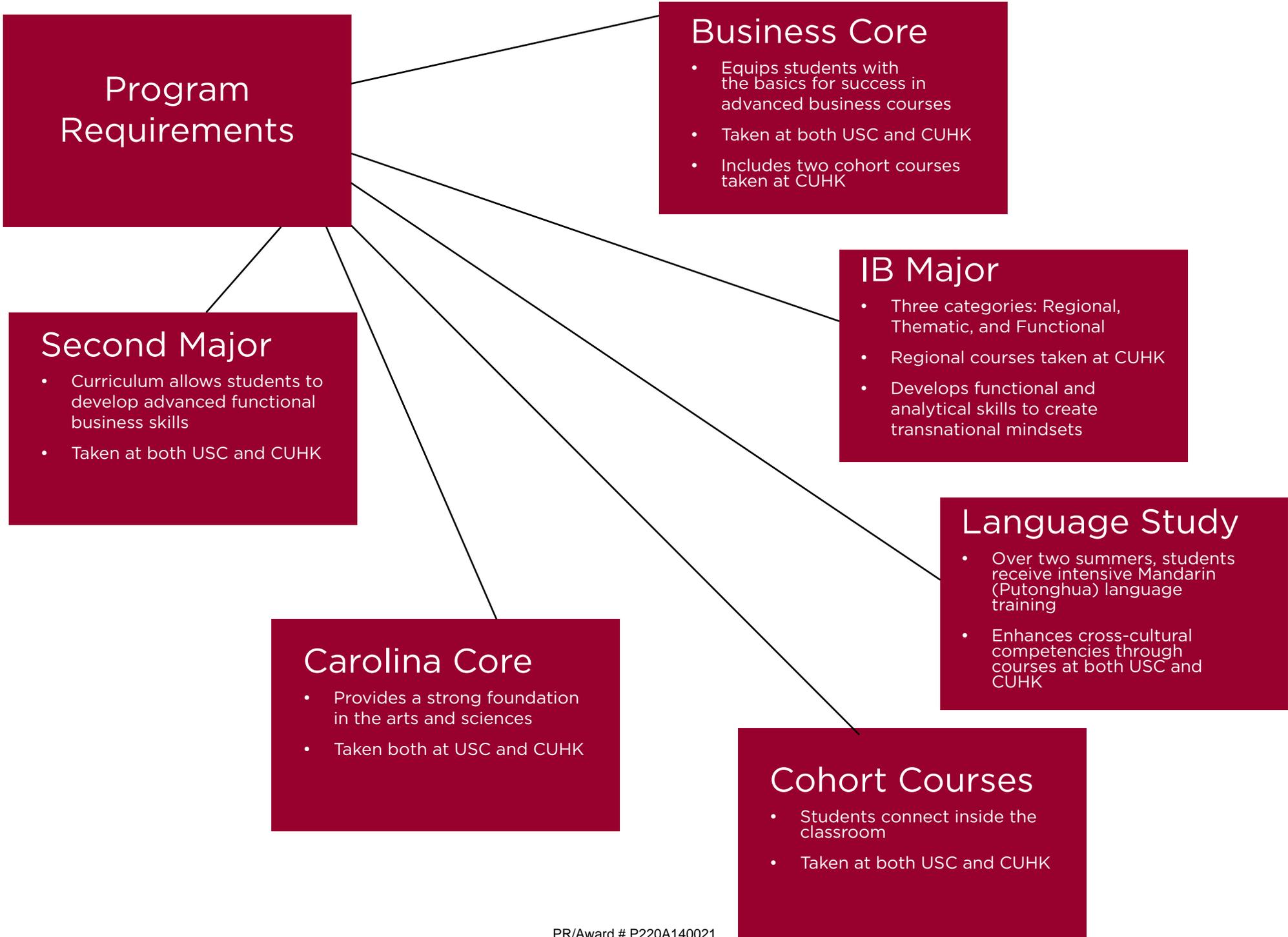
# Course Guide

## Four year Program

- Four year intensive, structured curriculum including a course taken together each year.
- Provides students with solid foundations in the arts and sciences and business.
- Develops analytical and interpersonal skills.
- Allows students to establish a transnational mindset preparing them for a future career in a changing world.

The following pages provide detailed course descriptions of possible options students may take throughout their four years in the IBCE program. Please note that these are just examples and are subject to change based upon availability.





# Carolina Core & Business Courses



**The Carolina core** consists of general education courses that provide a solid foundation for future collegiate academic success.

**The Business core** provides a solid business foundation by offering a range of courses that teach various functional skills.

## Carolina Core

A sampling of courses offered at USC

- Calculus for Business Administration and Social Sciences
- Cultural Geology
- Understanding Other Cultures
- Introduction to Global Politics
- World Literature
- Social Advocacy & Ethical Life
- Modern Political Theory
- Public Communication

A sampling of courses offered at CUHK

- Magic, Myth & the Supernatural
- Artistic Traditions in China
- Understanding Japanese Culture through Film
- History of Food: Hong Kong Culture
- China's Regional Foreign Relations
- Social Problems in China
- Chinese Diaspora: History of Chinatowns in the World

## Business Core

Courses offered at both USC and CUHK

- Computer Information Systems in Business
- Statistics for Business and Economics
- Introduction to Financial Accounting
- Introduction to Managerial Accounting
- Principles of Microeconomics
- Principles of Macroeconomics
- Professional Communication
- Business Careers in the Global Economy
- Survey of Commercial Law
- Operations Management
- Introduction to Finance
- Principles of Management
- Principles of Marketing
- Strategic Management

# Cohort Classes

The **Cohort classes** provide students with an opportunity to connect with the members of their cohort inside the classroom.

## Year One

Taken at USC

### Special Study in International Business

**Credits: 1**

The purpose of this course is to introduce key cultural themes in international business as they pertain to International Business majors in the IBCE program. This will serve as a course of preparation for the time in Asia as part of the international business major. We will explore and discuss a variety of social, cultural and economics subjects that influence and impact learning in international contexts, including higher educational settings. There will be invited guest lectures on subjects ranging from emotional intelligence (EQ) and cultural intelligence (CQ) to adapting in new cultural environments. Particular focus will be dedicated to understanding values and traditions in Asia and China with emphasis on education and professional development. The course will also provide opportunity for students to address important procedures required for their study abroad in Hong Kong.

## Year Two

Taken at CUHK

### Principles in Management

**Credits: 3**

This course introduces the philosophy of business operations and the framework of decision-making process. The study in

organization includes structural design, mechanics and dynamics of organization and the use of informal organization. The study in management includes functions of management: planning, organizing, staffing, direction and control.

### Marketing Management

**Credits: 3**

This course is devoted to the study of the management of marketing functions, the analysis of external forces affecting marketing decision making, the implementation and control of marketing activities, and an examination of the global impact of marketing. Course objectives include the development of students' understanding of the fundamental concepts underlying the selection and assessment of markets and the development and delivery of products, an investigation of the role and contribution of marketing to the conduct of successful business operation and to society, and to develop student abilities in identifying marketing opportunities and viable marketing strategies.

## Year Three

Taken at USC

### IBUS 310 - Globalization and Business

**Credits: 3**

The business opportunities and threats for individuals, companies, and countries created by the growth of globalization, and how companies must operate in diverse foreign

environments and engage in specialized transactions.

## Year Four

Taken at CUHK

### China Business

**Credits: 3**

This course aims to provide basic familiarity of China's foreign business operations and strategic issues related to these activities. Major topics include the business and investment environments of China; China's foreign trade policy; the foreign business operations and system of China; business negotiation and dispute settlement; the development and future prospects of the China market and special economic zones; the service industry in China.

### Marketing in China

**Credits: 3**

The major objective of this course is to prepare students to become a good decision maker in China marketing. Students will become aware of the strategies, skills and attitudes that are essential for effective and efficient marketing practices in China. Topics include: analysing the marketing environment in China; understanding Chinese consumer behaviour; conducting marketing research in China; developing and implementing marketing strategies in China.

# International Business Core



## Functional international business elective

A course which provides the international dimension of a course in an existing business discipline, such as economics, finance or marketing.

(3 credit hours)

May be taken at USC or CUHK

### ECON 503- International Trade Economics (prereq: ECON 321)

**Credits: 3**

Theory of international specialization, commercial policy, customs unions, and the effects of trade liberalization and protectionism; economic growth and multinational enterprises.

### ECON 504-International Monetary Economics

**Credits: 3**

Exchange rate and balance of payments determination; purchasing-power parity; optimum currency areas, absorption, elasticity, monetary approaches, spot- and forward-exchange markets.

### ECON 505-International Development Economics

Economic theories of growth in developing countries. Use of factor resources; role of social and economic institutions; use of financial trade policies for growth.

### IBUS 401-International Financial Management

**Credits: 3**

The financial management

of a multinational business enterprise.

### IBUS 402- International Marketing

**Credits: 3**

Cultural, legal, political, and economic factors affecting international marketing of products and services. Emphasis on differences in lifestyles, beliefs, attitudes, etc., and their influences upon marketing decisions.

### MGMT 406- International Human Resources

**Credits: 3**

This course examines how human resources are managed within a global context. It examines how human resources are managed within global firms as well as across different cultural settings.

## Thematic international business elective

A course which considers an international business activity such as market entry, global strategic planning or export-import from a multi-disciplinary perspective.

**Thematic**

(3 credit hours)

### IBUS 422-Foreign Market Entry and Growth

**Credits: 3**

International market selection, global market entry, and growth and regional expansion strategies. Topics covered through readings, case studies,

and an international marketing simulation game.

### IBUS 423-Cross-Cultural Behavior and Negotiations

**Credits: 3**

Understanding of cross-cultural differences and their effects on individual behavior and business practices in organizations.

### IBUS 424- Exporting and Importing

**Credits: 3**

The conduct of international trade, including terms of sale (INCOTERMS), financing arrangements, means of payment, credit insurance, shipping and insurance issues, support services, and trade facilitation.

### IBUS 425- Competitive Strategies in Developing Countries

**Credits: 3**

Strategies multinational companies use to compete in developing countries. Topics include management of political risk, impact of culture, and corporate responsibility and ethics.

### IBUS 426-Global Competitive Analysis

**Credits: 3**

The course examines how to leverage the competitive advantage of the firm to another country, access comparative advantages of another location, and link these two to create cross-country advantages.

### IBUS 427-Global Stakeholder Management

**Credits: 3**

Survey of the managerial, political, economic, sociological and psychological foundations of global stakeholder management and engagement through extant theory and case study examples of suc-

cessful and failed stakeholder management strategies in various industries and multiple countries.

## Regional international business electives

Courses which develops an understanding of the cultural, geographic, political and economic factors of a particular region as they relate to the conduct of business in that region..

(6 credit hours)

Courses taken at CUHK (see cohort courses).

## Second Major Courses offered at CUHK

- Economy of China
- Emerging Financial Markets of China
- International Microeconomics
- International Finance
- Central Banking & Regulatory Financial Institutions
- Fixed Income Securities Analysis
- Business Policy and Strategy
- International Human Resources Management
- Global Entrepreneurship
- Global Marketing Management

**The International Business Core** requires students to take an introductory course as well as at least one course from the Functional and Thematic categories. Two regionally focused business courses will be taken at CUHK.



UNIVERSITY OF  
**SOUTH CAROLINA**  
Darla Moore School of Business

Darla Moore School of Business  
International Business  
University of South Carolina

1705 College Street  
Columbia, SC 29208

**[www.moore.sc.edu](http://www.moore.sc.edu)**



UNIVERSITY OF  
**SOUTH CAROLINA**  
Darla Moore School of Business



26TH ANNUAL

# Faculty Development in International Business

The Nation's Leading and Most Comprehensive  
Program for Faculty Teaching International Business

**JUNE 8-13 | 2014**

Darla Moore School of Business  
University of South Carolina  
Columbia, South Carolina

**GLOBALIZE YOUR BUSINESS CURRICULUM. EXPERT FACULTY FROM THE MOORE SCHOOL'S TOP-RANKED INTERNATIONAL BUSINESS PROGRAM BRING YOU TECHNIQUES, EXPERTISE AND RESOURCES TO BUILD OR EXPAND YOUR IB CURRICULUM.**

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Page e209

# PROGRAM OVERVIEW

**INTERNATIONAL BUSINESS** is essential for today's business schools. Students are demanding international expertise to compete in the global business environment. If your school needs to add or expand your international business offerings, Faculty Development in International Business (FDIB) offers the tools and knowledge needed to internationalize your curriculum.

The Moore School's FDIB program is the oldest and most highly regarded program of its kind. The goal of the program is to internationalize business school faculty, preparing them to teach international business courses.

**Acquire the knowledge, skills and resources necessary to create and implement a world-class international business curriculum from the leader in international business education:**

- Develop course outlines, syllabi and lecture notes
- Review top textbooks and supporting course material
- Gain knowledge of key case studies, simulations and exercises
- Acquire current information and research on emerging markets
- Build a support network of other international business faculty

## WHO SHOULD ATTEND?

- Faculty members preparing to teach international business courses for the first time
- Faculty members who are currently teaching international business courses at the graduate/undergraduate level who want to enhance their courses or curriculum
- Faculty from any department who would like a solid grounding in specific international business topics
- Ph.D students who are developing their teaching portfolio for their first academic job

## PROGRAM SEMINARS

FDIB is a series of five concurrent seminars. Each participant chooses one of the five week-long seminars and spends the week with some of the top faculty in the international business discipline, developing both professional knowledge about the particular topic and pedagogical skills that will enhance teaching of the subject.

### Choose from five concurrent seminars, taught by leaders in international business education:

- Survey of International Business
- International Management
- International Marketing
- International Financial Management
- Global Supply Chain and Operations Management

### One-hour bonus sessions on emerging and transition markets:

- China
- Eastern Europe
- Latin America

## PROGRAM SCHEDULE

<b>June 8</b>	6 – 8 p.m.	Welcome Reception/ Distribution of Materials
<b>June 9*</b>	8:30 a.m. – 5 p.m.	Class
<b>June 10*</b>	8:30 a.m. – 5 p.m.	Class
<b>June 11*</b>	8:30 a.m. – 5 p.m.	Class
<b>June 12</b>	8:30 a.m. – 5 p.m. 6 p.m.	Class Graduation Banquet
<b>June 13</b>	8:30 a.m. – noon	Class

\*One-hour bonus sessions will be held from 4 – 5 p.m.

## CIBER SCHOLARSHIPS

### – Limited Number Available –

- \$500 CIBER scholarships for faculty and doctoral candidate participants
- \$1,000 CIBER scholarships for Minority Serving Institution (MSI) participants

The Center for International Business and Education Research (CIBER) offers a limited number of scholarships for the FDIB program. Scholarships will be granted based on an application process and review by the University of South Carolina CIBER administration.

Scholarship applicants are required to pay a \$500 deposit prior to admission. If an applicant is not granted a scholarship and chooses to cancel his/her registration, the deposit is fully refundable providing a refund is requested at least 14 days prior to program start.

To be considered you must submit a complete application packet, which consists of:

- Completed FDIB Online Registration
- \$500 Deposit (payment options included in online registration)
- Letter of recommendation from the applicant's dean or department head explaining the impact their participation will have on their school (Submit letters to: **Daniel-Mickel Center for Executive Education, FDIB Application Letters, Darla Moore School of Business, 1705 College Street, Columbia, SC 29208**)





## SURVEY OF INTERNATIONAL BUSINESS

This seminar provides an overview of the field of international business.

### Topics include:

#### Macro-Environmental Aspects

- International trade and investment
- International monetary systems
- Global and regional organizations
- Government policies
- National cultures

#### Micro-Managerial Aspects

- International finance
- International marketing
- International strategy and management
- International corporate social responsibility and ethics

Through these seminars, faculty will achieve an understanding of current events and developments in the global economy, their effects and how to incorporate them into the courses they teach.

**DR. ANDREW SPICER** (Ph.D., University of Pennsylvania) is an associate professor of international business in the Sonoco International Business Department at the Darla Moore School of Business at the University of South Carolina. His research and teaching focus on the intersection of business and society in a global economy. His research has examined privatization policies and outcomes in post-communist countries; the effects of national context and identity on managers' ethical evaluations and behaviors; the processes that lead to the spread of corrupt business practices across regions and companies; and the role of business model innovation in combating poverty and environmental degradation around the world.

Email: [aspicer@moore.sc.edu](mailto:aspicer@moore.sc.edu)

# INTERNATIONAL MANAGEMENT

This seminar prepares participants to teach international management with a focus on multinational corporations (MNCs). First, it provides in-depth substantive knowledge on recent trends and best practices in global competitive strategies, organizational structures and capabilities, control and coordination in MNCs, global leadership and innovation and knowledge management. It discusses how political, economic, institutional and cultural contexts impact MNCs' business models. Special attention is directed at emerging markets and the challenges and opportunities of conducting business there, including dealing with dynamic and underdeveloped institutional environments, bottom-of-the pyramid strategies and reverse innovation.

Second, the seminar provides an extended discussion and guidance on the pedagogy of teaching these subjects, including the use of a variety of teaching methods such as cases, simulations, role play and research projects. Participants have the opportunity to go through the main topics in a real class-type setting, to observe and participate in the pedagogical approach used by the instructor and to discuss effective teaching strategies and methodologies with their peers.

## In this seminar, participants will gain specific knowledge and skills in the following ways:

- Conducting institutional and cultural analysis and analyzing impact on business
- Performing strategic analysis of a company's global activities and organizational capabilities
- Learning best management practices in today's global business environment
- Understanding the challenges and opportunities in emerging markets for MNCs and emerging market firms
- Getting hands-on experience in teaching cases and conducting exercises and simulations
- Developing a course syllabus and receiving feedback from the instructor and peers

**“Excellent knowledge of topics and great experience with real global companies. Tatiana is amazing.”**

**William Johnson  
Associate Professor  
Penn State Erie**



**FACULTY**

**TATIANA KOSTOVA** (Ph.D., University of Minnesota) is the Buck Mickel Chair and Professor of International Business at the Darla Moore School of Business at the University of South Carolina. Her research is at the intersection of MNC management, global strategy, organizational behavior and organization theory; it includes topics such as transfer of best practices in MNCs, control and coordination of foreign subsidiaries, institutional embeddedness of companies, adaptation of business models across borders and developing psychological ownership, dual identification and social capital in MNCs. She has published her work in top management and international business journals including the Academy of Management Review (AMR), the Academy of Management Journal (AMJ) and the Journal of International Business Studies (JIBS); and she has served in editorial roles at AMR, AMJ, JIBS, the Journal of Management Studies and others. She has won numerous research and teaching awards, including best dissertation at the Academy of International Business (AIB) and Academy of Management's (AOM) International Management (IM) Division and Best PMBA and EIMBA Professor. She has been a visiting professor at WU (Vienna, Austria), Tec de Monterrey (Mexico) and CUHK and Hong Kong University (Hong Kong). She has served as Vice President of AIB and Chair of the IM Division of AOM and is an AIB Fellow.

Email: [kostova@moore.sc.edu](mailto:kostova@moore.sc.edu)



**CHUCK C.Y. KWOK** (Ph.D., University of Texas-Austin) is the Charles W. Coker, Sr. Distinguished Moore Fellow and Professor of International Business at the Darla Moore School of Business at the University of South Carolina. He has received numerous teaching awards and several research awards. He is a frequent contributing author to the *Journal of International Business Studies*, the leading academic journal in International Business. His fields of specialization include international financial management, culture and finance and international business education. He was a Vice President-Administration of the Academy of International Business. He has been consistently invited as a visiting professor at prestigious institutions around the world, including the Peking University (Beijing University, PRC), the Chinese University of Hong Kong (Hong Kong, PRC), Wirtschaftsuniversitat Wien (Austria) and the Monterrey Institute of Technology (ITESM, Mexico).

Email: [ckwok@moore.sc.edu](mailto:ckwok@moore.sc.edu)

## INTERNATIONAL FINANCIAL MANAGEMENT

Finance faculty members who are preparing to teach international corporate finance at the graduate or undergraduate level will benefit from the curriculum of this workshop.

### In this seminar, participants will gain specific knowledge in the following topics:

- Foreign exchange markets and foreign currency derivatives
- International financial markets
- Foreign exchange risk management
- Global financing strategies
- Valuation of foreign investment projects
- Financial dimensions of political risk management
- Managing intra-corporate fund flows
- International tax planning
- Export/import finance

### Participants will gain important tools and support:

- Suggested undergraduate and graduate course outlines
- Ready-to-use lecture notes and cases
- Copies and discussion of key international finance texts
- Training in how to conduct currency simulation games in class
- Computer spreadsheets to aid in analysis of international finance



# FACULTY

**OMRANE GUEDHAMI** (Ph.D., Laval University) is a Moore Research Fellow and an Associate Professor of International Business at the Darla Moore School of Business at the University of South Carolina. His dissertation, “Liberalization, Corporate Governance and Privatization,” was awarded the 2003 Best Dissertation in International Finance Case Award at the Financial Management Association Conference. His current research focuses on corporate governance, privatization and corporate social responsibility. His research has been published in the Journal of Financial Economics, the Journal of Accounting Research, the Journal of Accounting and Economics and the Journal of International Business Studies, among others. He has received several research and teaching awards, including the Rising Star Award, and MIB and Finance Professor of the Year Awards.

Email: [omrane.guedhami@moore.sc.edu](mailto:omrane.guedhami@moore.sc.edu)

## Moore School Top IB Rankings

- #1 in undergraduate international business for 17 consecutive years (U.S. News & World Report)
- Top 3 for graduate international business for 24 consecutive years (U.S. News & World Report)
- #1 for “best international experience” among world’s top business schools (Financial Times)



## GLOBAL SUPPLY CHAIN & OPERATIONS MANAGEMENT

This seminar will examine the important dimensions of managing operations and supply chains in a global context. Emphasis will be placed on identifying and understanding various elements of producing and distributing goods and services across national borders.

### In this seminar participants will gain specific knowledge in the following:

- Pedagogical issues in teaching global operations and supply chain management courses – frameworks, issues and class projects
- Strategic assessment and design of supply chains
- Global sourcing strategies
- Analytical tools in global sourcing
- Managing supply and demand uncertainties in global supply chains
- Product development and supply uncertainties in global supply chains
- Distribution strategies and logistics network design for global operations
- Supply chain interactions and value of information
- Global strategic alliances
- Sustainability and global supply chains: Reverse logistics in global operations
- Sustainability and global supply chains: Ethic
- Role of information technology and ERP in managing global supply chains

### Participants will gain important tools and support:

- Cases and in-class simulation games that illustrate global operations and supply-chain management
- Expanded syllabi with international course content

**MANOJ K. MALHOTRA** (Ph.D., The Ohio State University) is a Jeff B. Bates Professor and Chair of the Management Science Department at the Darla Moore School of Business at the University of South Carolina. He is a Fellow of the Decision Sciences Institute and American Production and Inventory Management Society. He has conducted seminars and consulted with several organizations, including Avaya, Cummins, John Deere, Phelps Dodge, Sonoco, Metso Paper, Palmetto Health Richland, UCB Chemicals and Westinghouse, among others. His areas of expertise include process improvement, operations strategy and supply chain management.

Email: [malhotra@moore.sc.edu](mailto:malhotra@moore.sc.edu)



# FACULTY

“The fact that the instructors are working with major corporations challenged with supply chain issues is a definite strength of the program.”

Devon Hall  
Professor  
Richmond Community  
College

**JAYANTH JAYARAM** (Ph.D., Michigan State University) is a Moore Research Fellow and Professor of Management Sciences at the Darla Moore School of Business at the University of South Carolina. His fields of specialization are global supply chain management, sustainable sourcing and global operations strategy. He has received funding for his research on global supply chain management from reputable agencies such as CIBER and the Institute for Supply Management. He serves on the editorial board of several supply chain management journals.

Email: [jayaram@moore.sc.edu](mailto:jayaram@moore.sc.edu)



## INTERNATIONAL MARKETING

This seminar features discussion of international marketing concepts and strategies. The key processes of international marketing are examined — evaluating new marketing opportunities, developing entry strategies, coordinating cross-national marketing programs and implementing global marketing initiatives.

### **In this seminar, participants will gain specific knowledge in the following:**

- Course structure and evaluation methods for required, elective, undergraduate and graduate international and global marketing courses
- Topical expertise in areas including cultural and other environmental influences on marketing, managing foreign entry modes, international manufacturer-distributor relations, standardization versus customization and international pricing
- Many articles, videos, cases, websites and other examples of informational marketing strategies and tactics for your students
- Tools to incorporate in your class, such as PowerPoint slides, Excel-based spreadsheet assignments, case study guides, international marketing projects and computer simulation games
- A network of colleagues teaching international marketing and business courses across a variety of colleges and courses

**MARTY ROTH** (Ph.D., University of Pittsburgh) is Dean and Professor of Management and Marketing at the Barney School of Business at the University of Hartford. Previously, he was Department Chair of the Sonoco International Business Department at the Darla Moore School of Business at the University of South Carolina. His fields of specialization include: global, corporate marketing and brand strategy, international market expansion and foreign market entry. He is coauthor of the leading international marketing simulation game CountryManager.

Email: [mroth@hartford.edu](mailto:mroth@hartford.edu)

# CONFERENCE & REGISTRATION INFORMATION

## LOCATION

The 2014 FDIB program will be held in the Darla Moore School of Business at the University of South Carolina's main campus in Columbia.

Darla Moore School of Business  
University of South Carolina  
Daniel-Mickel Center for Executive Education  
1705 College Street  
Columbia, SC 29208

## PROGRAM FEE

# \$2,150 USD

**15% discount for organizations sending three or more people**

The program fee includes instruction, a comprehensive materials package, breaks, daily continental breakfasts, lunches, Sunday night welcome reception and Thursday graduation banquet.

Please note that the full fee is payable in advance, or in lieu of payment, a purchase order or similar authorization may be submitted at time of registration.

International participants may make arrangements to wire transfer fees at the time of registration.

## ACCOMODATIONS

Hotel reservations, fees and transportation are the responsibility of each participant.

Room blocks have been secured at the following hotels, all of which are in close proximity to the Darla Moore School of Business. Please ask for the "FDIB Group Rate" when making your reservation.

### The Inn at USC

1619 Pendleton Street  
Columbia, SC 29201  
803.779.7779

[www.innatusc.com](http://www.innatusc.com)

FDIB rate: \$112

Distance: less than 1/2 block

Shuttle service available

### Courtyard Columbia Downtown @ USC

630 Assembly Street  
Columbia, SC 29201  
803.799.7800

FDIB Rate: \$119

Distance: less than one mile

### Hilton Columbia Center

924 Senate Street  
Columbia, SC 29201  
803.744.7800

FDIB Rate: \$129

Distance: approx. one mile

## CANCELLATIONS/REFUNDS

All cancellations and substitutions must be confirmed in writing. Substitutions may be made at any time. Written notification of withdrawal or transfer must be received by May 23, 2014 in order to receive a full refund. Cancellations made after this date, but prior to June 8, 2014, will receive a 50% refund of the program fee. If a registered participant does not attend the program, and has not withdrawn or made a submission, the full program fee will be assessed.

### Mail cancellations and substitutions to:

Darla Moore School of Business  
University of South Carolina  
Daniel-Mickel Center for Executive Education  
1705 College Street  
Columbia, South Carolina 29201

PR/Award # P220A140021

Page e219



**8TH ANNUAL  
FDIB-AFRICA:**

**Understanding the Business  
Challenges of Africa**

**May 12-24, 2014**

**South Africa,  
Mozambique and Swaziland**



**2014 FDIB-AFRICA CIBER**

**CONSORTIUM MEMBERS & CO-SPONSORS**

**Michigan State University, Indiana University,  
Texas A&M University, University of Florida,  
University of Memphis, University of Michigan,  
University of Pittsburgh, University of South Carolina**



UNIVERSITY OF  
**SOUTH CAROLINA**  
Darla Moore School of Business

PR/Award # P220A140021

Page e220

# FDIB-Africa Program

The Faculty Development in International Business (FDIB) - Africa program is offered by a consortium of CIBER universities. This program, funded in part by the US Department of Education and managed and led by the SC CIBER, focuses on providing participating faculty and professionals a unique study abroad opportunity, which will ultimately assist the U.S. in its international competitiveness via pedagogy, research, and business outreach.

## Program Objective

The objective of the FDIB-Africa program is to raise faculty and professionals awareness of the economic, political, business and cultural environments that exist in sub-Saharan Africa today, and, ultimately, to leverage that new-found, first-hand awareness into competence and expertise in classrooms, boardrooms, and in research campuses throughout the United States.

## Program Fee

The 2014 FDIB-Africa program fees are:

Faculty or Business Professional:	\$4,500
Spouses or Adult Guests:	\$3,500
Graduate Student:	\$3,500

**Note:** Spouses and adult guests (at least 21 years old) will lodge with their faculty or business professional sponsor, and may participate in either the business program or the concurrent “guest” program.

The fee covers double-occupancy lodging throughout the program (single occupancy may be purchased for an additional \$1,000 fee if available); many program meals (although most meals other than breakfast are NOT covered); all in-and-around ground transportation; and most entry fees to parks, tours, museums, and other exhibits and attractions.

Note that the fee does NOT cover round-trip airfare to Johannesburg, South Africa; that is the responsibility of each of the participants and their spouses/guests.

## Participants’ Comments

*“Inspiring, educational and encouraging!! It was a trip of a lifetime and I hope to perpetuate the momentum to actively contribute in various capacities in the future to both these countries.”*

— Brijesh Thapa, Professor, University of Florida

*“This was a transformative experience in terms of enhancing my understanding of the African economy and its business opportunities and challenges.”*

— Carrie Leana, Professor, University of Pittsburgh

*“The program provided a unique and wonderful opportunity to become familiar with aspects of Africa that were previously unknown to me.”*

— Lin Klein, Associate Dean, University of Connecticut

*“This program is excellent. A very well planned and managed introduction into the economies and doing business in Sub-Sahara Africa. Professors will gain considerable first-hand knowledge and varied experiences that will enrich their teaching and research activities. This has been a very useful, powerful, and meaningful experience. A ‘role model’ CIBER program.”*

— Stan Smedley, Professor, North Carolina Wesleyan College



## Program Travel Itinerary \*

Business sessions, academic visits, and Eco-Tourism tours will take place at each location, as appropriate.

<u>Date</u>	<u>Event</u>	<u>Time</u>
May 12	Arrive Johannesburg, South Africa	PM
May 13-17	Academic, Business & Cultural Visits	Full Days
May 18	Depart for Maputo, Mozambique	AM
May 19-20	Business & Cultural Visits	Full Days
May 20	Depart for Swaziland	PM
May 21-23	Business & Cultural Visits	Full Days
May 24	Return to Johannesburg and Depart for U.S.	AM/PM

**Note:** Eco-Tour locations to be visited will/may include: Apartheid Museum, Soweto, Lesedi Cultural Village, Sterkfontein Caves and Umoja in South Africa; Inhaca Island and Maputo Elephant Reserve in Mozambique; and Gone Rural in Swaziland. A detailed schedule for all events and activities for participants (and their guests) will be supplied upon approval of application and confirmation for participation in the program.

**\*Schedule is subject to change.**

## Required Documents (fax or email copies to SC CIBER)

- **PASSPORT** with a minimum of six months validity after date of return from Africa
- **TOURIST VISA (SOUTH AFRICA)** - not required of U.S. Citizens. *Note: Please consult your nearest consulate for more information if you are not a U.S. passport holder*
- **TOURIST VISA (SWAZILAND)** - not required of U.S. Citizens. *Note: Please consult your nearest consulate for more information if you are not a U.S. passport holder*
- **TOURIST VISA (MOZAMBIQUE)** - single entry visa required of all US Citizens prior to travel
- **PROOF OF HEALTH INSURANCE**
- **RELEASE & ASSUMPTION OF RISK** - available here in this brochure and on the SC CIBER website
- **TRAVEL INSURANCE** - participants are **REQUIRED** to provide proof of international travel insurance for this trip that covers, at a minimum, emergency medical evacuation and repatriation of remains

## Miscellaneous Expenses

Participants will be responsible for any personal and/or additional expenses including, but not exclusive to, visas, passports, airport taxes, internet, phone, lodging incidentals or extensions, meals not covered in the program, V.A.T., appropriate tips and any other “free time” tours or excursions not covered in the program fee.



## Application Form

*Participants are selected on a first-come, first-served basis until all positions are filled.*

**Please complete the application form below, and mail or fax to our address provided on the back of the brochure.**

- \$4,500: Faculty or Business Participant, DOUBLE room occupancy
- \$3,500: Spouse/Guest of Participant, DOUBLE room occupancy
- \$3,500: Graduate Student, DOUBLE room occupancy

NOTE: Single occupancy requires additional \$1,000 fee, and is subject to availability.

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First Name                      Middle Initial                      Last Name

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Home Address

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City    State    Zip

---

Home Phone    Home Fax

---

University & Department or Area    Title

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Email Address

---

Nationality    Country of Citizenship

---

Emergency Contact Info: Full Name and Address

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Emergency Contact Info: Home Phone, Mobile Phone, Email

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Medical Information: Allergies, Pre-Existing Conditions, Etc.

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Physician's Contact Info: Full Name, Address, Phone

***Please note that the program is subject to change; participants will receive a final program schedule NLT May 9, 2014. The FDIB-Africa Consortium reserves the right to make changes in the program as necessary and to cancel the program without obligation due to insufficient enrollment or other circumstances beyond our control.***

## Vaccinations and Prescriptions

Up-to-date vaccinations (yellow fever and hepatitis, and malaria medication) are highly recommended. Please consult your nearest consulate, as well as your physician, to ensure you have proper medical preparation for your trip. For all Rx medication, please hand-carry your prescription.

## Weather and Dress Code

Participants will travel to Africa during the end of Fall, and should pack clothing for both cool and warm weather, since temperatures will fluctuate from region to region and from day to night. Dress code for business visits is business casual. We will go on a game drive, so please pack accordingly; recommended items include comfortable shoes, insect repellent, sunglasses, and wet weather gear.

PR/Award # P220A140021

## Release and Assumption of Risk

I, the undersigned, being of legal age, do hereby agree and promise the following for and in consideration of my participation in a trip to sub-Saharan Africa to attend the Faculty Development in International Business program from May 12 through May 24, 2014, and all activities thereto:

I have volunteered to travel to Africa, for the purpose of participating in this program. I understand that it will be necessary to travel by public and/or private transportation; to stay in public and/or private lodging; and to dine at public and/or private facilities.

I agree and acknowledge that participation in this trip and its related activities is of my own free will. While I realize that I may participate in certain activities, which may promote and enhance the image and reputation of the State of South Carolina University system, the University of South Carolina, the Darla Moore School of Business, the South Carolina Center for International Business Education and Research-CIBER, the FDIB-AFRICA Consortium and the U.S. Department of Education, I acknowledge that I am acting neither as an employee nor agent of the State of South Carolina, the Board of Trustees, the University of South Carolina or any of their respective officers, employees or agents.

I agree and acknowledge that I am paying a fee that will cover some meals, in and around airfare, accommodations, ground transportation and activities specified in the program. I agree and acknowledge that I will have time for, and may engage in, personal activities unrelated to the purpose of the trip while I am in Africa. Such activities will be at my sole responsibility and risk.

I further acknowledge that in the course of the performance of any of the activities, which I have voluntarily assumed to perform during the trip, I expose myself to risks, known and unknown, of property damage or loss, as well as personal injury that could be painful, permanently disfiguring or debilitating and fatal. I fully assume these risks, which include, but are not limited to the risks with air and ground travel.

I, FOR MYSELF, MY HEIRS, EXECUTORS, ADMINISTRATORS AND ASSIGNS AGREE TO RELEASE, WAIVE, DISCHARGE AND RELINQUISH AND TO HOLD HARMLESS THE STATE OF SOUTH CAROLINA, THE BOARD OF TRUSTEES, THE UNIVERSITY OF SOUTH CAROLINA, THE DARLA MOORE SCHOOL OF BUSINESS, THE UNIVERSITY OF SOUTH CAROLINA CENTER FOR INTERNATIONAL BUSINESS EDUCATION AND RESEARCH-CIBER, THE FDIB-AFRICA CONSORTIUM, THE U.S. DEPARTMENT OF EDUCATION, AND THEIR RESPECTIVE OFFICERS, EMPLOYEES, AND AGENTS, FROM AND AGAINST ALL CLAIMS AND CAUSES OF ACTION WHICH MAY ARISE FROM MY PARTICIPATION IN THE TRIP AND ITS RELATED ACTIVITIES OR FROM PERSONAL UNRELATED ACTIVITIES WHETHER THE SAME SHOULD ARISE BY REASON OF NEGLIGENCE OF ANYONE ORGANIZING OR PARTICIPATING IN THE TRIP OR OTHERWISE, AND AGREE THAT UNDER NO CIRCUMSTANCES WILL I OR ANYONE CLAIMING THROUGH ME, PROSECUTE OR PRESENT ANY CLAIMS FOR PERSONAL OR BODILY INJURY, PROPERTY DAMAGE OR LOSS, OR WRONGFUL DEATH AGAINST THE STATE OF SOUTH CAROLINA, THE BOARD OF TRUSTEES, THE UNIVERSITY OF SOUTH CAROLINA, THE DARLA MOORE SCHOOL OF BUSINESS, THE UNIVERSITY OF SOUTH CAROLINA CENTER FOR INTERNATIONAL BUSINESS EDUCATION AND RESEARCH-CIBER, THE FDIB-AFRICA CONSORTIUM AND THE U.S. DEPARTMENT OF EDUCATION OR THEIR RESPECTIVE OFFICERS, EMPLOYEES, OR AGENTS.

I, for myself and any others claiming through me, accept full responsibility for safety and expenses and assume the complete risk of any injury to myself or my property which may arise out of or in the course of my participation in this trip.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_

Address \_\_\_\_\_

Witness Printed Name \_\_\_\_\_

Witness Signature \_\_\_\_\_

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# New Carolina

South Carolina's Council on Competitiveness

private leadership in economic development

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*On the cover, starting from the left:* Locally caught blue crabs, which form a significant part of commercial fishery in South Carolina, copyright © 2013 Denise McGill/University of South Carolina; Port of Charleston, copyright © 2013 South Carolina Ports Authority; South Carolina produce, copyright © 2013 Amy Overstreet, U.S. Department of Agriculture, South Carolina Natural Resources Conservation Service; South Carolina coastal sunset, copyright © 2013 Randy Taylor.

# New Carolina

## Private Leadership in Economic Development

Prepared by:

Laura McKinney, Deputy Executive Director, New Carolina

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### Table of Contents

Executive Summary .....	4
Introduction.....	8
Economic History.....	8
South Carolina Today .....	11
The Challenge .....	14
Competitiveness Initiative .....	15
New Carolina .....	17
New Carolina Activities.....	18
Outcomes and Indicators of Success .....	22
Lessons Learned .....	25
Conclusion.....	27
Appendix A: Progress Report on Competitiveness Recommendations.....	28
Appendix B: South Carolina Cluster Summaries .....	31
Appendix C: Smart Clusters.....	35
Appendix D: In Depth—The Carolinas’ Nuclear Cluster.....	38
Appendix E: South Carolina Competitiveness Network Pilot Agenda.....	44
Appendix F: County Map of South Carolina .....	48

# Executive Summary

This report on the New Carolina initiative is a study on how private sector leaders in South Carolina embraced the cluster development concept to upgrade their region's competitiveness. It provides insights into their motivation, explains what they did, discusses the impact they have had, and lays out the key lessons learned. It also displays real-world examples of how cluster-based economic development works as part of modern economic policy at the regional level. This Policy and Impact Study is the third in a series of four developed as part of the U.S. Cluster Mapping Project, an effort supported by the U.S. Economic Development Administration.

## Historical Economic Development and the Challenge to Change

South Carolina is facing a critical challenge to its traditional mode of competing as a place to do business. For nearly 50 years, from the 1950s to the early 2000s, state policymakers used an economic development strategy that centered on attracting manufacturers to the state with its flexible workforce, business-friendly environment, and responsive government. Low-wage, low-tax incentives enhanced South Carolina's agricultural and textile manufacturing base. From 1950 to the early 1980s, per capita income in South Carolina rose nearly 400 times in real terms and increased to nearly 80 percent of the national average. But from the 1980s to the early 2000s, per capita income stagnated at this 80 percent level. South Carolina began to see a rise in competition from other countries due to its low-wage, low-tax incentive strategy, which saw the departure of the state's textile manufacturing base. In spite of this stagnation, economic development used the same recruitment strategies as in the past.

It was in the late 1990s and early 2000s that business leaders began to look for new approaches to transform South Carolina's economy. The recruitment of BMW to upstate South Carolina in 1992, the loss of the textile industry to overseas locations, and the recognition of the importance of the South Carolina Ports Authority to the state's economic health triggered a new discussion of how South Carolina should compete in the increasingly global economy.

While the loss of textile manufacturing to foreign competition made embracing globalization difficult, many stakeholders recognized that the Port of Charleston could drive both the inflow of foreign direct investment and the outflow of exports, and enable globalization to have a net positive impact on the state. With a new vision of where South Carolina could sit in the global market, business leaders searched for a new model of economic development that could direct the focus of traditional industry recruitment.

## The South Carolina Council on Competitiveness – New Carolina

In 2003, several of South Carolina's key business and civic leaders launched the South Carolina

Competitiveness Initiative, which aimed to bring together relevant stakeholders from around the state, assess the competitive position of South Carolina, examine existing clusters in the state, and build consensus on a shared economic strategy for South Carolina. This collaboration resulted in the 2005 *South Carolina Competitiveness Initiative: A Strategic Plan for South Carolina*.

The report made eight recommendations for improving the competitiveness in South Carolina:

1. Create new institutions for economic development.
2. Activate and upgrade clusters.
3. Continue to enhance education and workforce development.
4. Invest in research and the university system.
5. Launch internal and external marketing plans.
6. Create an explicit economic development program for distressed areas.
7. Increase support for startups and local firms.
8. Measure progress in raising prosperity.

In order to meet the first recommendation, The South Carolina Council on Competitiveness, a 501(c)(3) organization that later became known as New Carolina, was created to mobilize clusters and improve the business environment for better growth. New Carolina was represented by top business leaders in the state, the governor, the secretary of commerce, and presidents of South Carolina's three research universities. The initial structure created a board of directors with 50 members and organized many others around task forces. As formal cluster organizations developed, each cluster group formed its own membership criteria and funding structure.

New Carolina initially began its work by spreading the theory of cluster development throughout the state. When it started in 2004, there was one active cluster in the state, which surrounded BMW and the Clemson University International Center for Automotive Research (CU-ICAR). As of 2013, there are 14 cluster organizations in varying stages of development and formality. New Carolina has direct management relationships with five of these cluster groups and provides various levels of support. Other economic development groups, including government agencies, also have started organizing their industry recruitment around clusters.

The second part of New Carolina's mission—to improve the business environment for better growth—has been done through task force support. New Carolina has task forces that focus on three key factors affecting business growth and competitiveness in the state: education and workforce development, entrepreneurship, and distressed areas. These three factors are relevant to all industry clusters and to the citizens of the state.

The level of support from business leaders across the state has remained strong since the beginning. Private sector business leaders are involved because they see that this adds value to their companies. Collaborating to solve industry problems and building a voice to speak to those problems have made an impact. The level of public support from the state government has fluctuated. Initially, there was tremendous support both financially and intellectually. However, as the state felt the effects of the 2007 recession, financial support from the state government disappeared, and New Carolina became a private sector funded initiative. New Carolina cluster groups and task forces have continued to engage with state government agencies on a working level with positive results. For example, the division of the South Carolina Department of Commerce (SCDoC) that promotes recycling market development has been instrumental in the functioning of the organized recycling cluster.

It is now a new stage in the life of New Carolina, as the organization has eight years of valuable experience to share from the collective knowledge of its board of directors and cluster chairs and managers. New Carolina is again reaching out to the South Carolina legislature to tell the story of the value of cluster development. Private sector cluster leaders are able to speak about the positive impact that New Carolina and cluster development activities have had on their businesses and on the state. New Carolina has begun to bring together the various cluster groups so that they may learn best practices from one another and discuss effective measures of success for individual organizations and for the state as a whole.

## Lessons Learned

1. **Key industry leadership needs to be engaged.** Quality involvement at both the CEO and mid-level is vital to maintaining the momentum of a cluster.
2. **State government officials need to be identified and engaged.** Access to both working-level officials with decision-making authority as well as to the highest-level state officials is beneficial to the business sector leaders as they work to make significant changes in their industries.
3. **Clusters need a focusing goal to serve as a rallying point.** Each cluster must develop new goals to move the group forward.
4. **Dedicated staffing is essential to sustain progress.** The level of structure needed requires adequate funding and private sector commitment.
5. **Not every cluster will follow the same course.** Each cluster will have its own identity just as each industry does.
6. **Clusters find value in collaboration across industries.** This develops a healthy business environment in which related industries are able to collaborate and grow.
7. **Traditional industry recruitment agencies can benefit from existing clusters.** Recruitment

agencies should be included in cluster development discussions so that they are informed about existing clusters, can target those industries, and can sell a vibrant industry cluster as an available resource.

8. **Task forces that focus on the cross-cutting factors of competitiveness are essential to improve the overall business environment.** Task forces are well suited to supporting long-term fundamental strategies that promote growth for all industries, but they need input across business sectors to succeed.
9. **Telling the story is vitally important for both cluster growth and motivation for the state.** Keeping cluster supporters informed of the organized cluster's activities allows both the private sector and the organizing entity to reach out to policymakers.
10. **Competitiveness is global; economic impact is local.** The economic impact numbers are important to make the case for industry influence, but competitiveness is about raising expectations as a state.

## Conclusion

South Carolina has made significant progress in the last 10 years—eight of those with the help of New Carolina. Business leaders created the organization out of concern that a focus on outside business recruitment was not sufficient for growth and prosperity in a global economy. Now when businesses are considering a move to South Carolina, recruitment agencies can use cluster development as a tool to identify existing networks of companies involved in industry and business environment growth. New Carolina leads the engagement through collaboration within industries, among cluster groups, and across the state on critical areas of focus. The result is a vibrant economy with forward-looking business leaders who collaborate with policymakers on actions to take that increase prosperity in South Carolina. Policymakers and practitioners can apply the lessons learned by New Carolina to their regions. However, each location needs to devise the right competitiveness strategy to leverage its unique mix of industry clusters and business environment conditions and, in turn, increase business growth, productivity, and new business formation.

# Introduction

This Policy and Impact Study is the third in a series of four developed as part of the U.S. Cluster Mapping Project, an effort supported by the U.S. Economic Development Administration. “New Carolina” provides real-world examples of how cluster-based economic development works as part of modern economic policy at the regional level. From 1950, South Carolina was heavily rooted in textiles and low-tech manufacturing, where a flexible labor force, cheap land, and business-friendly government were attractive enough to grow a decent economy in the state. However, South Carolina began to see a rise in competition from other countries due to this strategy. In the late 1990s and early 2000s business leaders began to look for new approaches to transform South Carolina’s economy. The recruitment of BMW to upstate South Carolina in 1992, the loss of the textile industry to overseas locations, and the recognition of the importance of the South Carolina Ports Authority to the state’s economic health triggered a new discussion of how South Carolina should compete in the increasingly global economy.

This report on the New Carolina initiative is a study on how private sector leaders in South Carolina embraced the cluster development concept to upgrade their region’s competitiveness. It provides insights into their motivation, explains what they did, discusses the impact they have had, and lays out the key lessons learned.

Over the last decade, cluster practitioners have gained significant experience in how to turn industry collaboration into better government policies and competitive advantages for firms. However, much of this experience resides with the individuals and organizations that have taken a cluster-based approach to economic development. At the federal level, discussions about cluster-driven policies have long been focused on arguments as to whether cluster policies are tantamount to picking winners. This study clearly shows that real cluster development efforts do not necessarily need such interventions. The examples here make a contribution to ongoing learning about best practices for cluster-driven economic development. However, each region must devise its own strategy for competitiveness based on its clusters and other strengths.

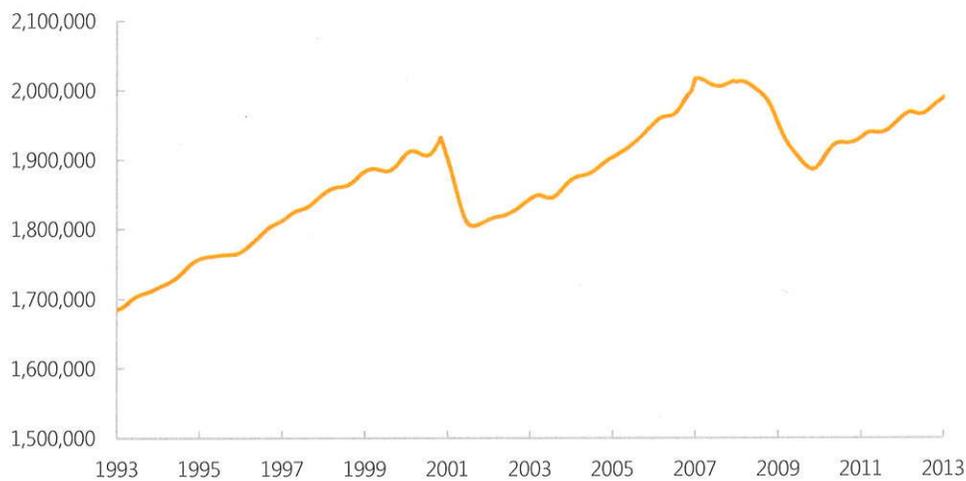
## Economic History

The post-World War II era from 1950 to 1980 was as rapid a period of growth and development for the South Carolina economy as it was for the national economy. The state’s population grew from 2.1

million in 1950<sup>1</sup> to 3.1 million in 1980,<sup>2</sup> an increase of nearly 50 percent, while its manufacturing employment increased by 200,000 jobs.<sup>3</sup> South Carolina’s urban population grew from approximately 37 percent to 54 percent by 1980,<sup>4</sup> signifying movement away from a predominantly agricultural economy. Perhaps most importantly, per capita income in South Carolina rose dramatically from 1950 to 1980, both in absolute terms and relative to the rest of the nation. In constant dollars, South Carolina per capita income grew over 400 percent, rising from about 60 percent of the national average to nearly 80 percent by 1980.<sup>5</sup>

However, from 1980 to the early 2000s, per capita income in South Carolina stagnated at 80 percent of the national average.<sup>6</sup> Part of the reason for this was that South Carolina continued to see a large increase in population and an influx of workers. This not only resulted in a larger economic base, but also made increases in per capita income more difficult to achieve. While population growth has been steady, employment numbers have fluctuated (see Figures 1 and 2 below).

Figure 1: South Carolina Employment (Seasonally Adjusted), 1993-2013<sup>7</sup>



<sup>1</sup> "Intercensal Estimates of the Total Resident Population of the States: 1950 to 1960 (in thousands)," *U.S. Bureau of the Census, Population Distribution Branch*. April 1995. See <http://www.census.gov/popest/data/state/asrh/1980s/tables/st5060ts.txt>.

<sup>2</sup> "Intercensal Estimates of the Total Resident Population of the States: 1980 to 1990 (in thousands)," *U.S. Bureau of the Census, Population Estimates Branch*. August 1996. See <http://www.census.gov/popest/data/state/asrh/1980s/tables/st8090ts.txt>.

<sup>3</sup> Ford, Lacy K., Jr. and R. Phillip Stone. "Economic Development and Globalization in South Carolina," *Southern Cultures*, Spring 2007, p. 30. See [http://www.newcarolina.org/UserFiles/publications/GlobalizationFord%20\(1\).pdf](http://www.newcarolina.org/UserFiles/publications/GlobalizationFord%20(1).pdf).

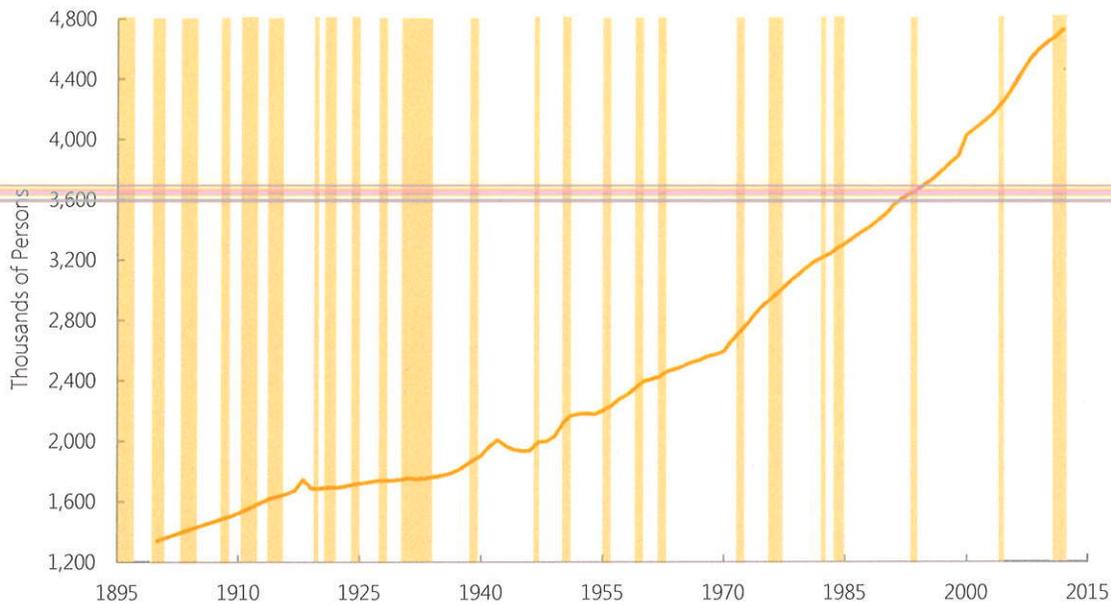
<sup>4</sup> Ford, Lacy K., Jr. and R. Phillip Stone. "Economic Development and Globalization in South Carolina," *Southern Cultures*, Spring 2007, p. 19. See [http://www.newcarolina.org/UserFiles/publications/GlobalizationFord%20\(1\).pdf](http://www.newcarolina.org/UserFiles/publications/GlobalizationFord%20(1).pdf).

<sup>5</sup> Ford, Lacy K., Jr. and R. Phillip Stone. "Economic Development and Globalization in South Carolina," *Southern Cultures*, Spring 2007, p. 19. See [http://www.newcarolina.org/UserFiles/publications/GlobalizationFord%20\(1\).pdf](http://www.newcarolina.org/UserFiles/publications/GlobalizationFord%20(1).pdf).

<sup>6</sup> Ford, Lacy K., Jr. and R. Phillip Stone. "Economic Development and Globalization in South Carolina," *Southern Cultures*, Spring 2007, p. 19. See [http://www.newcarolina.org/UserFiles/publications/GlobalizationFord%20\(1\).pdf](http://www.newcarolina.org/UserFiles/publications/GlobalizationFord%20(1).pdf).

<sup>7</sup> Adapted from the SC Dash data clearinghouse at the Darla Moore School of Business, University of South Carolina. See <http://search.scdash.com/Default.aspx?datasetId=4678#>. Underlying data comes from the U.S. Bureau of Labor and Statistics, Local Area Unemployment Statistics.

Figure 2: South Carolina Resident Population Growth, 1895-2013<sup>8</sup>



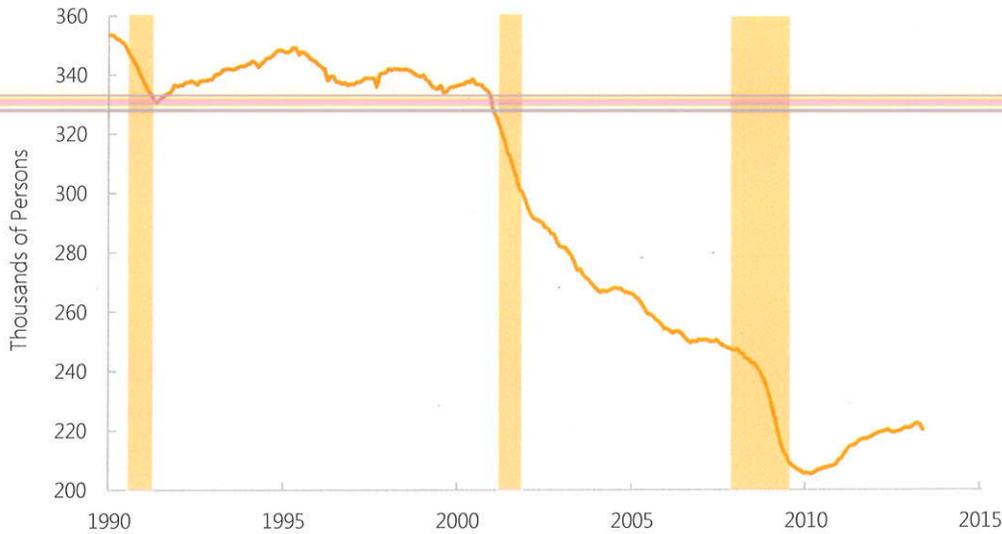
This fluctuation in employment reflects how the state has struggled to find its identity in the global economy. From the 1950s to 1980s, South Carolina implemented a low-wage, low-tax model for economic recruitment. The economic base for South Carolina was heavily rooted in textiles and low-tech manufacturing, where a flexible labor force, cheap land, and business-friendly government were attractive enough to grow a decent economy in the state. With increasing globalization, however, came competition from other countries for low-wage manufacturing jobs. South Carolina saw its competitive advantage in textiles disappear as many firms closed their doors in South Carolina and moved overseas to countries such as China or across the border to Mexico.

At the same time that South Carolina watched its textile jobs leave the United States, the state became the beneficiary of globalization with the arrival of BMW's production facility in the upstate (Greenville-Spartanburg) area. BMW's decision to locate in South Carolina in 1992 continued to impact the state almost 20 years later when Boeing located its Dreamliner assembly plant in the Lowcountry (Charleston) region of South Carolina. In the intervening years, the state struggled with its position on globalization and opening trade with new markets. Many stakeholders blamed the opening of trade for the decline of the textile industry, but 20 years later, South Carolina ranked as one of the highest states for foreign direct investment per capita in the nation. The new textile industry, while vastly different

<sup>8</sup> SCPOP is the variable name used by FRED® (Federal Reserve Economic Data) for the resident population of South Carolina by year. Shaded bars indicate U.S. recessions. See <http://research.stlouisfed.org/fred2/series/SCPOP>. Underlying data comes from the U.S. Department of Commerce, Census Bureau.

from its predecessor, is now alive and well. Making the decision to embrace globalization put South Carolina in a position to weather the 2007 recession (see Figure 3).

Figure 3: South Carolina Manufacturing Employment, 1990-2013<sup>9</sup>



## South Carolina Today

South Carolina today has many strong assets, including the fact that it is a Right to Work state with a low cost of living and a technical college system oriented to manufacturing. Two of the state’s greatest strengths include its infrastructure and research university system, which is committed to economic development.



The highlight of the state’s infrastructure is the Port of Charleston, South Carolina’s connection to the global economy. The port is a key economic driver for the state and was ranked eighth nationally by dollar value in 2012.<sup>10</sup> The 2015 widening of the Panama Canal presents the potential for significant growth of the port and the state’s economy as a whole. Linking the rest of the nation to the port is a network of five interstate highways, three airports, and two class-one railroads, with construction set to begin for an inland port (Figure 4).

<sup>9</sup> SCMFG is the variable name used by FRED® (Federal Reserve Economic Data) for the manufacturing employment in South Carolina by year. Shaded bars indicate U.S. recessions. See <http://research.stlouisfed.org/fred2/series/SCMFG?cid=27323>. Underlying data comes from the U.S. Department of Labor, Bureau of Labor Statistics.

<sup>10</sup> "Cargo Value," *South Carolina Ports*. 2012. See <http://www.port-of-charleston.com/About/statistics/dollarvalue.asp>.

Figure 4: Infrastructure Map of South Carolina<sup>11</sup>



South Carolina has three research universities that focus on the commercialization of new technologies. In 2002, the state legislature established the SmartState Program™, which allowed the research universities to create centers of economic excellence to advance South Carolina’s economy. Since its beginnings, the SmartState Program has attracted more than \$1.2 billion in non-state investments, has led to the creation of more than 7,000 jobs, and has assembled a “Who’s Who” list of corporate partners, including BMW, Fluor, Michelin, and SCANA.<sup>12</sup>

Today, there are nearly 50 SmartState Centers in six industry-focused “Smart Clusters” regarded as critical to the state and beyond: Advanced Materials and Nanotechnology, Automotive and Transportation, Biomedical, Future Fuels®, Information Science, and Pharmaceutical.<sup>13</sup> These focus industries coincide with many of the industry clusters identified as areas where South Carolina has a competitive advantage.<sup>14</sup>

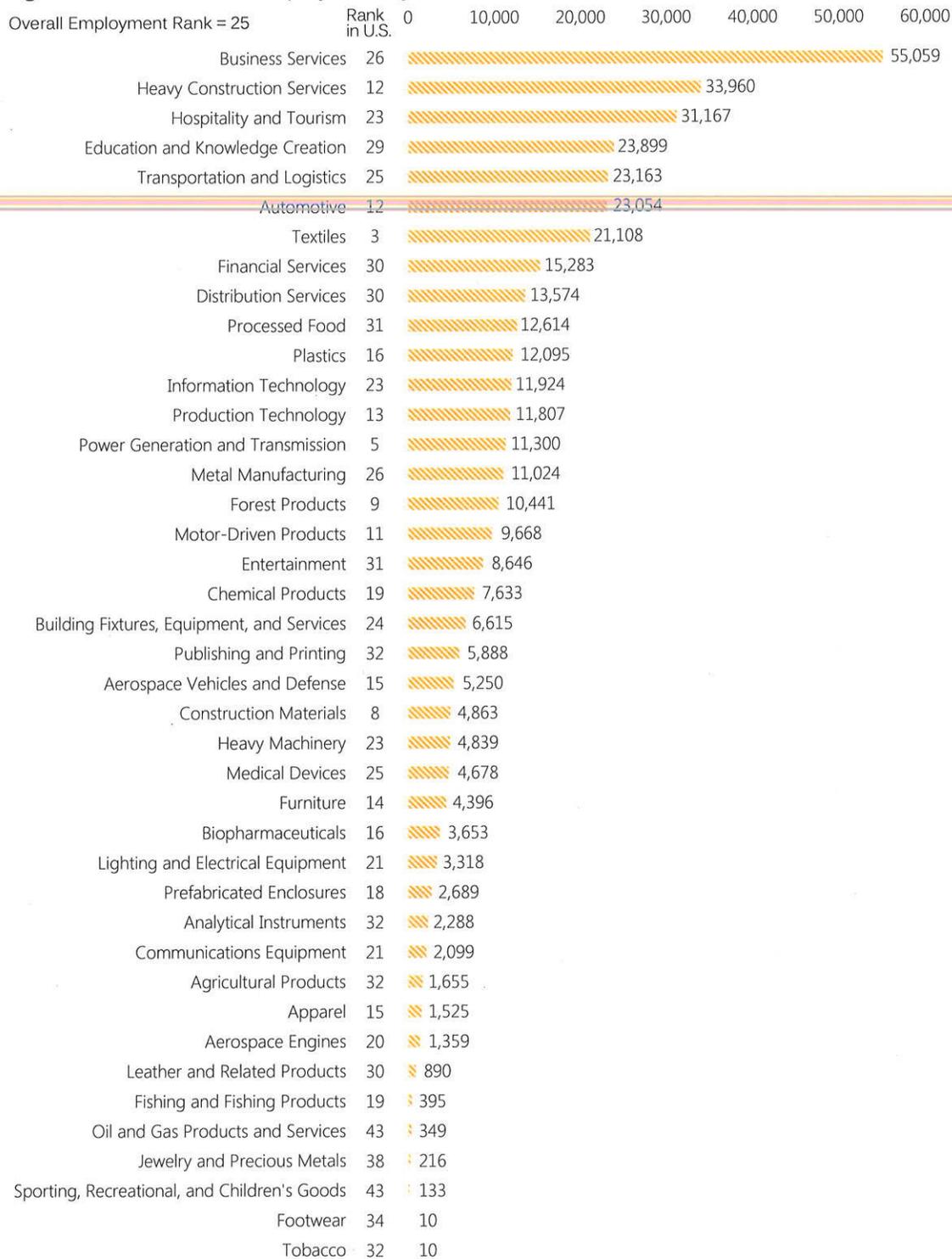
<sup>11</sup> “2012 Activity Report,” *South Carolina Department of Commerce*. See <http://sccommerce.com/2012-activity-report>.

<sup>12</sup> “An Introduction to the SmartState Program™,” *SmartState: SC Centers of Excellence*. 2012. See <http://smartstatesc.org/introduction>.

<sup>13</sup> “An Introduction to the SmartState Program™,” *SmartState: SC Centers of Excellence*. 2012. See <http://smartstatesc.org/introduction>.

<sup>14</sup> See Appendix C for more information on Smart Clusters. These overlap with the industry clusters identified as strategic strengths in the Strategic Plan for South Carolina, produced as part of the South Carolina Competitiveness Initiative. See <http://www.newcarolina.org/UserFiles/publications/A%20Strategic%20Plan%20for%20South%20Carolina%20by%20Micheal%20Porter%202005.pdf>.

Figure 5: South Carolina Employment by Traded Cluster, 2010<sup>15</sup>

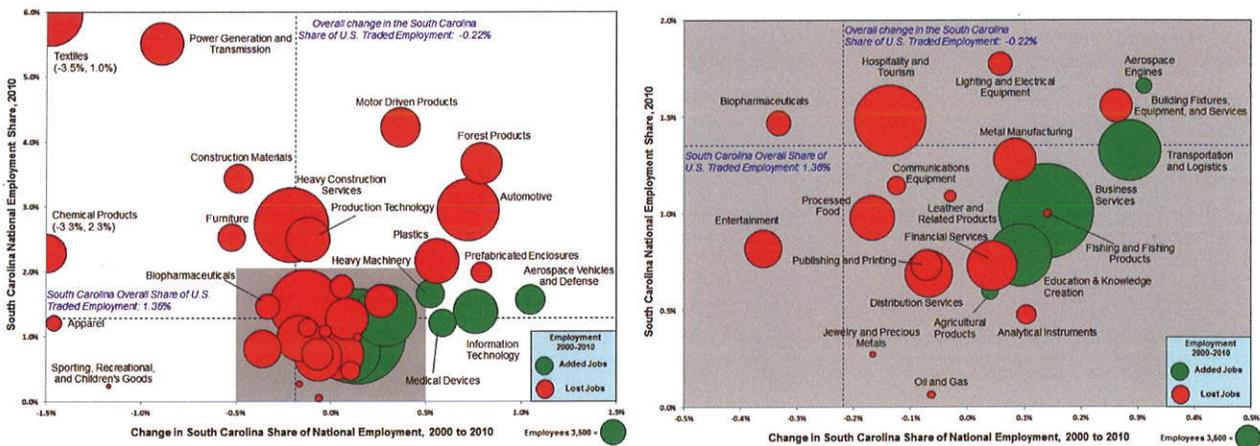


<sup>15</sup> Adapted from data available on the U.S. Cluster Mapping website. See [http://clustermapping.us/index.html?d-set=db;mode=open;map\\_or\\_chart;set:chart;year\\_start:1998;year\\_select:2010;cp\\_region:state;cp\\_type:1;cp\\_cluster;cp\\_sub\\_cluster;cp\\_region\\_shading\\_type;cp\\_bubble\\_type:none;cp\\_org\\_marker:no;cp\\_area:45;cp\\_chart\\_select:region;cp\\_chart\\_analyses:ec-chart](http://clustermapping.us/index.html?d-set=db;mode=open;map_or_chart;set:chart;year_start:1998;year_select:2010;cp_region:state;cp_type:1;cp_cluster;cp_sub_cluster;cp_region_shading_type;cp_bubble_type:none;cp_org_marker:no;cp_area:45;cp_chart_select:region;cp_chart_analyses:ec-chart).

Based on the chart of employment by traded cluster in Figure 5, national rankings for cluster industries show South Carolina to be well positioned in today's economy to grow its assets. With nine industry clusters ranking in the top 15 for the nation—including Textiles—South Carolina has the potential for significant growth.

Figure 6 illustrates South Carolina's traded cluster specialization and shows the traded clusters that have added or lost jobs from 2000 to 2010.

Figure 6: South Carolina Economy Traded Cluster Composition, 2000-2010<sup>16</sup>



# The Challenge

The strategy of attracting manufacturing operations by emphasizing a flexible workforce, cheap land, good infrastructure, and responsive government was successful for a while, especially at creating jobs and attracting investments. However, in the era of increased globalization that started in the 1990s, it has been less effective at actually creating value or raising the standard of living in the state. A growing number of low-cost competitors around the world, such as China and Mexico, have rendered this job creation strategy less viable in the 21st century.

Wage growth in South Carolina was slower than in the rest of the United States between 1990 and 2001 (3.7 percent and 3.9 percent, respectively), and average wages in South Carolina still stood at

<sup>16</sup> Adapted from data available on the U.S. Cluster Mapping Website. See [http://www.clustermapping.us/?d-set=db.mode:open,map or chart;set:chart,year.start:2000,year.select:2010,cp.region:state,cp.type:1,cp.cluster:cp.sub.cluster:cp.region.shading.type:cp.bubble.type:none,cp.org.marker:no,cp.area:45,cp.chart.select:region,cp.chart.analyses:sc-chart](http://www.clustermapping.us/?d-set=db.mode:open,map%20or%20chart;set:chart,year.start:2000,year.select:2010,cp.region:state,cp.type:1,cp.cluster:cp.sub.cluster:cp.region.shading.type:cp.bubble.type:none,cp.org.marker:no,cp.area:45,cp.chart.select:region,cp.chart.analyses:sc-chart)  
 Professor Michael E. Porter, U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School;  
 Richard Bryden, Project Director.

approximately 80 percent of those in the United States at the end of that period.<sup>17</sup> The state's unemployment rate was consistently higher than the national average throughout the late 2000's recession, reaching to almost 12 percent in 2009.<sup>18</sup> Innovation output also lagged behind the rest of the country in the 2000s, with patents per employee less than half of the national average (a gap that had been increasing)<sup>19</sup> and venture capital funding at less than \$3 per worker, compared to a national average of \$155 per worker.<sup>20</sup>

South Carolina faces several challenges as it transitions into a new globalized knowledge economy, in which growth has largely been driven by highly innovative technology and knowledge-based companies. While its economic development leaders have sought to attract corporate headquarters and research and manufacturing facilities, the effort has proven difficult. The most critical factor limiting growth is the availability of an educated, sustainable workforce. Industry leaders have struggled to find new strategies to increase their workforce talent pipeline and remain competitive.

## Competitiveness Initiative

The challenge of making South Carolina competitive became an issue that concerned many of the state's business and civic leaders, particularly following the 2001 recession. As concerned citizens, they worried that South Carolina was falling behind relative to its neighbors in per capita income and quality of life measures. As business leaders, they were particularly concerned about the impact that South Carolina's struggle to compete in the new knowledge-based economy would have on both their own companies and on the broader state economy. In 2003, several of these leaders launched the South Carolina Competitiveness Initiative, which aimed to bring together relevant stakeholders from around the state, assess the competitive position of South Carolina, examine existing industry clusters in the state, and build consensus on a shared economic strategy for South Carolina.<sup>21</sup>

<sup>17</sup> "Compensation of employees by industry," *U.S. Department of Commerce, Bureau of Economic Analysis*. 1990 and 2001. See Table (SA06N) <http://www.bea.gov/iTable/iTable.cfm?reqid=70&step=1&isuri=1&acrdn=4#reqid=70&step=27&isuri=1&7028=-1&7083=Levels&7031=0&7022=21&7023=0&7024=Non-Industry&7025=0&7026=45000&7001=421&7029=21&7090=70>.

<sup>18</sup> For South Carolina: "Local Area Unemployment Statistics," *U.S. Department of Labor, Bureau of Labor Statistics*. 2003-2013. See <http://data.bls.gov/timeseries/LASST45000003>. For the United States: "Labor Force Statistics from the Current Population Survey," *U.S. Department of Labor, Bureau of Labor Statistics*. 2003-2013. See

[http://data.bls.gov/pdq/SurveyOutputServlet;jsessionid=0D09FE64515E532209F1377F80B4A436.tc\\_instance5](http://data.bls.gov/pdq/SurveyOutputServlet;jsessionid=0D09FE64515E532209F1377F80B4A436.tc_instance5).

<sup>19</sup> "Patents by Country, State, and Year - Utility Patents," *U.S. Patent and Trademark Office*. December 2012. See [http://www.uspto.gov/web/offices/ac/ido/oeip/taf/cst\\_utl.htm](http://www.uspto.gov/web/offices/ac/ido/oeip/taf/cst_utl.htm).

<sup>20</sup> "MoneyTree™ Report," PricewaterhouseCoopers and National Venture Capital Association. See <https://www.pwcmoneytree.com/MTPublic/ns/nav.jsp?page=historical>. Combined with U.S. Bureau of Labor Statistics data.

<sup>21</sup> The Initiative recruited Harvard Business School Professor Michael E. Porter to advise the effort, and hired the strategy consulting firm Monitor Group to produce an initial report and a set of recommendations on improving South Carolina's competitiveness. The partners conducted interviews with over 125 leaders in business, academia, and government; administered nearly 450 surveys to business executives; conducted secondary research; and analyzed economic indicators from a variety of sources.

The results of the Competitiveness Initiative suggested a new direction for the state's economy—one that moved “from a region seeking to create jobs to a region striving to raise prosperity; from offering a low-cost position to building an environment that will foster differentiated high-value creation; from simply recruiting outside companies to building robust clusters; and from government-led initiatives to public-private collaboration.”<sup>22</sup>

The 2005 report, *South Carolina Competitiveness Initiative: A Strategic Plan for South Carolina*,<sup>23</sup> emphasized that South Carolina had a good business climate with low levels of taxation, but was hampered by chronic underfunding in the state's public education system, a lack of support for research universities, and a low workforce skill level relative to that of the nation. A new commitment to the public education system, including higher and technical education, would enhance the state's ability to drive human capital improvement and thus raise per capita income and economic competitiveness.

The report provided eight recommendations for improving the South Carolina economy:<sup>24</sup>

1. Create new institutions for economic development.
2. Activate and upgrade clusters.
3. Continue to enhance education and workforce training.
4. Invest in research and the university system.
5. Launch internal and external marketing campaigns.
6. Create an explicit economic development program for distressed areas.
7. Increase support for startups and local firms.
8. Measure progress in raising prosperity.

The first step was to create an organization to take charge of implementing these recommendations and provide private sector “ownership” of the Competitiveness Initiative. The South Carolina Council on Competitiveness, later rebranded as New Carolina, began with a board that included over 100 representatives from large and small businesses, universities, and government. New Carolina's mission has been to find, build, and celebrate industry clusters in South Carolina and to improve the business environment for better growth.

<sup>22</sup> South Carolina Council on Competitiveness, Monitor Group, and Michael E. Porter. “South Carolina Competitiveness Initiative: A Strategic Plan for South Carolina,” 2005. See <http://www.newcarolina.org/UserFiles/publications/A%20Strategic%20Plan%20for%20South%20Carolina%20by%20Micheal%20Porter%202005.pdf>.

<sup>23</sup> South Carolina Council on Competitiveness, Monitor Group, and Michael E. Porter. “South Carolina Competitiveness Initiative: A Strategic Plan for South Carolina,” 2005. See <http://www.newcarolina.org/UserFiles/publications/A%20Strategic%20Plan%20for%20South%20Carolina%20by%20Micheal%20Porter%202005.pdf>.

<sup>24</sup> See Appendix A for a summary of the progress made on each of these eight recommendations.

# New Carolina

New Carolina's history is one of adaptation and accomplishment. The organization was created with a board of directors that represented businesses across the state, and was led by Chairman M. Edward Sellers, then CEO of BlueCross BlueShield of South Carolina. Initially, state support was strong, with active involvement by then Governor Mark Sanford, South Carolina Department of Commerce (SCDoC) Secretary Bob Faith, and presidents of the state's research universities. As the effects of the recession were felt in the legislature, state funding and the involvement of the governor's office stopped. However, New Carolina clusters and task forces have continued to engage with state government agencies on a working level with great results. For example, the division of the SCDoC that promotes recycling market development has been instrumental in the functioning of the organized recycling cluster.

New Carolina also has received some federal funding, which has opened the doors for the organization on the national and international cluster development stage. In addition to being a part of the U.S. Economic Development Administration (EDA) grant for the U.S. Cluster Mapping Project, New Carolina was one of 10 recipients of a U.S. Small Business Administration (SBA) grant of \$1.2 million over two years for the Carolinas' Nuclear Cluster (CNC). This grant helped draw more small businesses in the Carolinas to the two-state area's nuclear cluster, which aims to optimize the competitive advantage of nuclear production. New Carolina also was awarded a \$27,000 grant from the EDA for "Regional and Statewide Networks to Promote the Growth of Entrepreneurial Firms in South Carolina" and produced a report with the Darla Moore School of Business at the University of South Carolina (the Moore School of Business) detailing the impact of entrepreneurial firms on the economy of South Carolina.<sup>25</sup>

New Carolina launched with enthusiasm, but an election cycle and a shift in focus to national and international audiences marked a decline in public outreach about the group's ongoing activities. The cluster organizations themselves handled most of the public relations and did not strongly emphasize New Carolina's involvement. For several years, the task of identifying and growing clusters and working with funding changes overshadowed New Carolina's story. Communicating the accomplishments of this organization has reemerged as a top priority.

Telling the story is one of the fundamental requirements of a successful competitiveness initiative, and there have been many successes to impart. From early cluster initiatives like the CNC to more recent ramp-ups such as the RecyclonomicsSC recycling cluster, New Carolina has been supporting initiatives with federal and foundation grant writing, staff support, and financial management. New Carolina has directly contributed to the launch of the CNC, South Carolina Tourism Alliance, Carolinas' Engineering

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<sup>25</sup> Follow-ons to the grant will be discussed in the following "New Carolina Activities" section.

Cluster, Transportation Distribution Logistics (TDL) Council, Insurance Technology and Services South Carolina (iTs|SC), Creative Industries Cluster, Medical Devices cluster, South Carolina Hydrogen and Fuel Cell Alliance, Advanced Security Technology Research Alliance (ASTRA), and RecyclonomicsSC.

The life cycle of a cluster is difficult to predict. One of the tenets of cluster development is that while all cluster initiatives are good, they do not necessarily have advantageous timing or an optimal mix of resources and focus. Most New Carolina cluster initiatives are doing well and primarily run themselves, such as the CNC and the TDL Council. Some initiatives have evolved into new partnerships, such as the Medical Devices cluster, which became part of the life sciences association SCBIO, and ASTRA, which became part of the Charleston Defense Contractors Association (CDCA). However, other initiatives like the South Carolina Tourism Alliance have become dormant. After some short-term successes, such as the “Time to Thaw” national marketing campaign to promote South Carolina tourism, the Tourism cluster initiative became largely focused on legislative lobbying. With the economic downturn, state funds have not been as forthcoming as they were in the past, and the Tourism cluster has been waiting for new leadership to provide new goals and direction.

New Carolina’s push to promote clusters has had some visible impact. Not only is there broader awareness of the existing clusters, but the idea of clusters as a tool has been gaining traction as well. Other economic development groups, including government agencies, also have started organizing their industry recruitment around clusters.

## New Carolina Activities

New Carolina has been working to connect the dots across South Carolina to ensure that the state is focusing its efforts on the areas where it can be most competitive on the national and global stage. New Carolina differentiates itself from other trade associations or chambers of commerce by reaching out across industries, academia, and the public sector that all have mutual objectives. The key to a competitiveness agenda is collaboration. Such collaboration occurs on many levels: within a cluster, between organized clusters, and among various entities interested in working on a common goal. New Carolina works on all these levels as part of a comprehensive competitiveness strategy.

### Cluster Activation and Development

The first layer of collaboration is formalizing a cluster within an industry. Cluster activation requires industry leaders to come together in support of a common vision for their industry. New Carolina facilitates this visioning process by including the relevant public sector officials. Support from educational institutions can either be included at the beginning or added later as cluster needs are identified. Once a cluster organization has a clear vision—which may necessitate an economic impact

study to fully realize its scope—a strategic plan can be created to identify goals and metrics for success. New Carolina has provided levels of collaboration support to clusters at different stages of progress. Every cluster has its own qualities and needs. New Carolina’s ability to be flexible to such needs has enabled it to maintain contacts and provide support in many ways to a variety of clusters.

One example of an organized cluster that has united the public and private sectors at the highest levels of state leadership is the TDL Council. TDL Council membership is limited to 27 private sector businesses directly involved with transportation, distribution, or logistics, with three seats reserved for leaders of the SCDoC, South Carolina Department of Transportation (SCDoT), and South Carolina Ports Authority. Companies that provide support to the TDL Council are invited to become associate council members.

State government leadership was supportive of New Carolina in its early years, both financially and intellectually. Because the recession decreased the amount of state revenue available for economic development activities that the government believed could be supported by the private sector, state funding was stopped completely in 2007. As a result, high-level engagement diminished. State involvement continued through SCDoC staff members that were active in a number of cluster activities and task forces, including the recycling cluster. It was with the formation of the TDL Council that influential state leaders reengaged with New Carolina.

The TDL Council was established to ensure that South Carolina would be prepared to take advantage of the increase in shipping business that followed the widening of the Panama Canal in 2015. The Port of Charleston has been the economic driver of South Carolina, despite falling in national rankings over the first decade of the 21st century.<sup>26</sup> For the first time, the leaders of the SCDoC, SCDoT, and South Carolina Ports Authority came together with the private sector to envision the future of the industry, and the TDL Council was formed. The council held a statewide summit to develop its strategic plan, which called for the creation of a statewide freight plan that the entities had never before produced. The TDL Council is currently working with the SCDoT on the creation of a statewide multimodal freight plan, which will be championed by TDL Council business leaders in the state legislature during funding priority determination.

An example of a mostly private sector driven cluster is the CNC, which formed in 2007.<sup>27</sup> The Carolinas supplied 9.9 percent of the nation’s nuclear energy in 2011.<sup>28</sup> Currently, North Carolina has five nuclear reactors in operation, 32 percent of the state’s total electricity generation, and two potential new units in the application process. South Carolina has seven operating reactors, 52 percent of the state’s total

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<sup>26</sup> “Transportation, Distribution and Logistics: A Plan to Ignite the Cluster,” p. 5, *New Carolina*. See [http://www.newcarolina.org/UserFiles/ncar/Documents/tld\\_plan\\_final\\_low%20res.pdf](http://www.newcarolina.org/UserFiles/ncar/Documents/tld_plan_final_low%20res.pdf).

<sup>27</sup> See Appendix D for more information on the CNC.

<sup>28</sup> “Generation Statistics,” *Nuclear Energy Institute*. See <http://www.nei.org/resourcesandstats/graphicsandcharts>.

electricity generation, and two of four new nuclear builds in progress. Since its inception, the CNC has commissioned two economic impact studies and a strategic plan. Early on, the CNC developed a list of criteria to determine eligibility for membership and to ensure that the member base would be focused on the future of nuclear energy. Membership now consists of 54 organizations across both states. Through New Carolina, the CNC received one of 10 SBA grants for Regional Innovation Clusters for a total of \$1.2 million over two years. The grant was to develop and integrate more small businesses into the nuclear energy supply chain, support continued growth of the cluster, and address gaps to establish a long-term, sustainable, and competitive position.

One of the most innovative initiatives from the CNC was Leadership Energy Carolinas (LEC). This program was developed to cultivate young talent in the nuclear industry. With an aging workforce and increasing demand, the nuclear industry recognized workforce development as an immediate goal. The CNC asks its member organizations to consider their high-potential employees for this one-year professional development forum. There are four LEC class sessions each calendar year that focus on communications, media, research, legislative issues, and industry trends. Class members visit various nuclear operations in the Carolinas and meet industry executives, policymakers, and others critical to the success of the Carolinas' nuclear cluster. All this has helped make LEC a best practice under consideration by other New Carolina clusters.

## South Carolina Competitiveness Network and Summit Planning

In 2013, New Carolina started a pilot project to provide collaboration across organized clusters with the South Carolina Competitiveness Network.<sup>29</sup> The first meeting included managers from each identified cluster organization, as well as representatives from the Upstate South Carolina Alliance and the Charleston Regional Development Alliance (CRDA), both of which have focused on regional cluster industries for targeted economic development recruitment. The meeting began with a panel on lessons learned from three of the more established clusters in the state; continued with a discussion of the U.S. Cluster Mapping Project, including a demonstration of its website; and concluded with a challenging discussion on measuring success.<sup>30</sup> The Competitiveness Network envisions bringing together cluster organization representatives four to six times a year to discuss themes of competitiveness.

New Carolina also is planning a Competitiveness Summit. Plans include launching a competitiveness index by which South Carolina can measure its progress relative to other states and countries. The summit also would grant awards to specific cluster organizations and leaders and recognize those who have made the biggest impact on the competitiveness of their industries. There is great enthusiasm

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<sup>29</sup> The South Carolina Competitiveness Network was inspired by the Oregon Cluster Network, which New Carolina was introduced to through the U.S. Cluster Mapping Project.

<sup>30</sup> See Appendix E for the "South Carolina Competitiveness Network Pilot Agenda."

among cluster group participants for the opportunity to come together and develop a plan to further advance South Carolina.

## Task Forces

In addition to cluster-specific collaborations, one of New Carolina's mandates is to improve South Carolina's business environment for better growth. There are three key factors of the business environment that New Carolina focuses on through its task forces: Education and Workforce Development, Entrepreneurship, and Distressed Areas. These factors are relevant to all clusters and to state residents as they work to move the economy forward. Similar to clusters, each task force has its own sense of timing and an optimal mix of resources and leadership.

The most active and successful of the task forces has been Education and Workforce Development, the only forum in South Carolina where education and workforce development agency heads, policymakers, and business leaders meet on a regular basis to prioritize issues and collaborate on solutions. The initial focus of the task force was to support the development and adoption of the South Carolina Education and Economic Development Act (EEDA). The EEDA, passed in 2005, established a new vision for education based on the idea of "Personal Pathways to Success" for all students. This act integrates academic and career-based education into a unified system that offers more and better ways for all students to succeed.

Following the successful adoption of the EEDA, the task force continued the discussion on workforce development. In 2012, the task force assessed its progress in integrating career paths into the education system, as well as in aligning high school exit requirements with college and career entrance requirements. Research indicated that after significant initial success with increasing the South Carolina high school graduation rate to one percent short of the national average, the graduation rate—like the state's per capita income numbers—stagnated, signaling the need for some fundamental changes.

At the end of 2012, a steering committee organized under the South Carolina State Board of Education approached New Carolina with recommendations for transforming the public education system. The steering committee had evaluated the problem and recommended solutions, but needed a public-private organization that could implement its ambitious plan. The committee was drawn to New Carolina's reputation as a collaborative organization with access to leaders in business, the public sector, and education at all levels. New Carolina officially accepted this challenge in December 2012,<sup>31</sup> and the initiative under New Carolina was publicly launched at a summit on May 1, 2013.

The Entrepreneurship Task Force focuses on creating the best environment for startups in South Carolina. Startup firms require much different levels of support than established businesses. The initial

<sup>31</sup> "Innovation Initiative Steering Team Report and Recommendations," *South Carolina State Board of Education*. October 10, 2012. See <http://www.newcarolina.org/UserFiles/publications/NC%20Steering%20Team%20Final%20Report%202012%2010.pdf>.

focus of the Entrepreneurship Task Force was on identifying and cataloging business incubators around the state and publicizing their services to entrepreneurs. This was implemented through a research project and culminated in a conference and the presentation of a resource catalog.

The next step in supporting entrepreneurship was to reach out to high-growth, high-impact firms, which are responsible for the majority of job growth in South Carolina. New Carolina supported this activity with EDA funds matched by private sector funds to conduct two high-impact entrepreneurship conferences and to commission a study. The first conference in 2009 was a conversation about increasing the number of startup firms and existing firms that have the potential to eventually become large companies with headquarters in the state. Following that first conference in 2009, a study was commissioned by New Carolina through the Moore School of Business to identify those high-impact firms in South Carolina.<sup>32</sup> From the second conference held in 2011, recommendations included conducting a capital markets study to identify the barriers to growing smaller firms into larger firms. In 2013, through the FABER Center for Entrepreneurship at Moore School of Business, New Carolina commissioned the *Capital Market Study*, which contained recommendations for improving capital market opportunities in South Carolina.<sup>33</sup> Currently, New Carolina and its partners are discussing the implementation of those recommendations.

Distressed Areas, the final task force under New Carolina, started in 2005 with an inventory of programs and resources available for economically distressed areas in South Carolina. A group of dedicated individuals initiated a strategic plan in 2008, but a number of factors caused the group to lose momentum after the plan was created. The Palmetto Institute, a task force member, initiated one element of the strategic plan—the Benefits Bank of South Carolina. It created a one-stop shop for those eligible for access to federal and state benefits to maximize the impact of those programs in the areas where they are needed most.

## Outcomes and Indicators of Success

The most difficult part of evaluating organized cluster efforts is determining how to measure success. For each industry, success has a different meaning: for the insurance technology and services industry, success is measured by increased awareness of the industry as evidenced by social media and digital

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<sup>32</sup> "High-Impact Firms in South Carolina," *Darla Moore School of Business at the University of South Carolina*. July 2011. See <http://www.newcarolina.org/UserFiles/publications/High%20Impact%20Firm%20Study%20FINAL%2020110718.pdf>.

<sup>33</sup> "South Carolina Capital Market Study," *Darla Moore School of Business at the University of South Carolina*. January 2013. See <http://www.newcarolina.org/UserFiles/publications/Capital%20Market%20Study.pdf>.

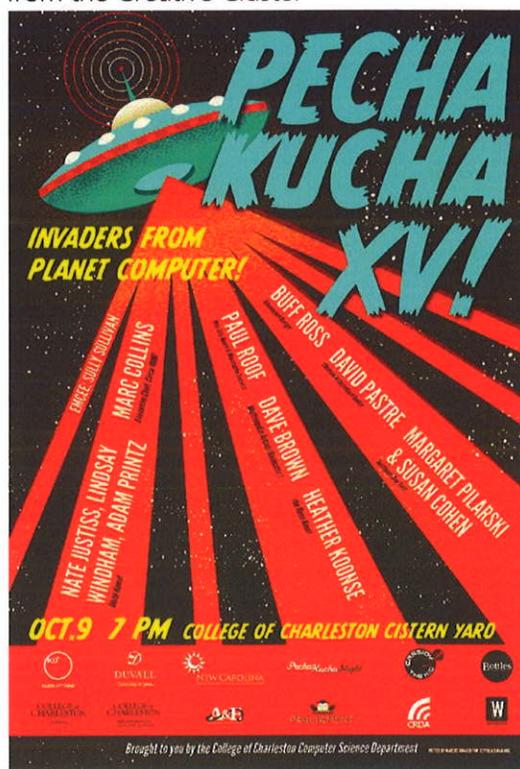
media analytics; for the nuclear industry, success is attracting more leading industry headquarters to the Carolinas; and for the Creative Industries Cluster, success is represented by new ventures that arise from informal connections made at a cluster gathering.

The largest evidence of New Carolina's success—and that of the organized cluster effort in general—stems from the fact that private companies continue to invest in the organization and believe it is worth their time and resources. Whereas many economic development strategies are government-driven—for example, incentives to attract branch manufacturing—New Carolina's cluster efforts have largely been private sector led. Therefore, they have focused on what established companies in South Carolina believe is important to boost collective competitiveness.

For example, the CNC has seen dramatic growth over the last five years. Since 2007, the cluster organization has steadily grown from its original 18 members to more than 50 today. Members include globally recognized leaders in nuclear technology, engineering, construction, utility operations, research, education, and small supply and service firms. They view membership as a way to enhance their reputation and credibility. High meeting attendance demonstrates that senior leadership in these organizations view the CNC as a worthwhile use of their time. Further evidence of the CNC's success comes from the recognition that it has received from many external sources.<sup>34</sup>

New Carolina also can point to many other outcomes over the last 10 years. In addition to the nuclear cluster, the creative cluster that is centered on Charleston also has been successful. Largely driven by individuals who were less concerned with economic development, this cluster has become recognized as a driver of economic revitalization with tremendous impact. Initially, a steering committee was organized to galvanize the members by holding the inaugural "Pecha Kucha Charleston." Pecha Kucha (Japanese for "chit chat") is a licensed program that allows presenters only 20 slides, each shown for no more than 20 seconds. Fifteen Pecha Kucha events have been held in Charleston, some selling out to 300 people in less than 20 minutes. The idea has been adopted around the state not only as programs, but also as a format for various conference presentations.

Figure 7: A Pecha Kucha Advertisement from the Creative Cluster



<sup>34</sup> See Appendix D for an in-depth look at the CNC.

There also have been improvements in South Carolina's chronic human capital challenges. The Education and Workforce Development Task Force has succeeded in increasing the pipeline of high school graduates prepared for higher education and careers and in connecting the adult workforce to education, training, and careers in the knowledge economy. It has launched a number of initiatives that have been highly successful, including the EEDA.

In addition, South Carolina has shown marked improvements in a number of areas:

- The total number of GED diplomas has risen every year, from 4,364 in 2004 to 7,731 in 2010. At the same time, the pass rate of adults taking the GED has risen from under 70 percent to over 75 percent. For the first time in 2010, South Carolina's pass rate exceeded the national average.<sup>35</sup>
- The total number of apprenticeships has jumped from under 800 in 2007 to more than 3,000 in 2011, while the number of registered apprenticeship programs has more than tripled from 90 to 290 in the same period.<sup>36</sup>

## Metrics of Success:

### "Measure what you can, tell stories about the rest."

All organized cluster leaders realize the importance of measurable success. At the South Carolina Competitiveness Network Pilot meeting, they determined that two types of measures were needed—one to measure an industry and one to measure a cluster. Evidence of industry success included economic impact studies and the number of jobs created and dollars invested, as well as the number of patents applied for and awarded. For the creative industry, revenue per employee was a good indicator of economic impact. Cluster leaders noted that economic impact numbers showed the local impact of job growth and industry strength, but measuring cluster competitiveness required thinking in terms of a national or even global perspective.

The U.S. Cluster Mapping website is one source for cluster competitiveness data that could help lead to a comprehensive statewide competitiveness index for South Carolina. Before New Carolina can recommend a statewide competitiveness index, strong consideration must be given to determine the correct indicators. The challenge is in choosing measures that the clusters can have a direct impact on. There is also real danger in measuring the state against indicators that will not be greatly affected year to year, as this may be construed as a lack of progress. While increasing competitiveness and raising

<sup>35</sup> "SC GED Pass Rate Exceeds National Average Again," *South Carolina State Department of Education*, July 26, 2012. See <http://ed.sc.gov/agency/news/?nid=1803>.

<sup>36</sup> "The New Evolution of Apprenticeship: Quick Facts," *Apprenticeship Carolina*<sup>TM</sup>. See <http://www.apprenticeshipcarolina.com/default.html>.

prosperity are long-term propositions, incremental progress must occur to maintain momentum and morale.

Consideration must also be given to which other organizations can be used as appropriate comparables. For example, the CRDA created an annual Scorecard of Competitiveness for the Charleston metropolitan statistical area (MSA). In order to choose the indicators by which Charleston would be measured, the CRDA first chose which MSAs it wanted to be measured against. A significant amount of online data was available that could be used to develop the indicators. The CRDA chose to follow the Model for Economic Prosperity pyramid<sup>37</sup> to assess the hard data of the MSA's economic development outcomes—economic output, employment, earnings, and income—and the soft data of competitiveness inputs—human capital, innovative activity, entrepreneurial environment, and quality of place. By targeting the clusters where the Charleston MSA had a competitive advantage, the CRDA created a comprehensive picture of its current situation with recommendations to improve in the future.

## Lessons Learned

After eight years of activity, New Carolina, its cluster organizations, and its partners have many lessons learned to share. At the recent Competitiveness Network meeting, the following lessons were identified:

1. **Key industry leadership must be engaged.** Quality involvement at both the CEO and mid-level is vital to maintaining the momentum of an organized cluster. Growth in membership was not a goal in every cluster group, but all agreed that a basic requirement was quality membership. The CNC has strict membership eligibility requirements, the TDL Council has limited seats, and the Creative Industries Cluster does not have a formal membership model.
2. **State government officials need to be identified and engaged.** Access to working-level officials with decision-making authority and the highest-level state officials is beneficial to business sector leaders as they work to make significant changes in their industries. State and local government should be included in cluster activities to make them a part of the solution. This will also help the governments leverage their resources for the greatest visible impact.
3. **Clusters need a focusing goal to serve as a rallying point.** Cluster activation success is higher when there is a focus for action and when long- and short-term objectives are balanced. The lack of longer-term objectives was one reason that the Tourism cluster initiative stalled, whereas the focus on such objectives has been a source of strength for the CNC. Once a cluster comes together, new goals need to be developed to move the group forward.

<sup>37</sup> "2012 Regional Economic Scorecard," *Charleston Inspired*, 2012. See <http://www.crda.org/economicsscorecard>.

4. **Dedicated staffing is essential to sustain progress.** The level of structure needed requires adequate funding and private sector commitment. It is important to start with the end goal in mind so that initial funding commitments can take into account the costs associated with the goals and activities envisioned by the organized cluster. New Carolina's most effective cluster efforts have paid positions rather than relying on volunteer staffing.
5. **Not every cluster will follow the same course.** Each cluster will have its own identity just as each industry does. There are a number of structural models to choose from for cluster development, but the implementation of those models will be unique to each industry.
6. **Clusters find value in collaboration across industries.** This develops a healthy business environment in which related industries are able to collaborate and grow. Likeminded cluster developers see the value in "cross-pollinating" clusters like recycling and the TDL Council, where natural synergy exists.
7. **Traditional industry recruitment agencies can benefit from existing clusters.** Recruitment agencies should be included in cluster development discussions so that they are informed about existing clusters, can target those industries, and can sell an existing vibrant industry cluster organization as an available resource.
8. **Task forces that focus on the cross-cutting factors of competitiveness are essential to the overall business environment.** Task forces are well suited to supporting long-term fundamental strategies that promote growth for all industries, but they need input across business sectors to succeed. For example, workforce development is critical to the success of many industries in South Carolina. The Education and Workforce Development Task Force of New Carolina brings the power of business to bear on the education system in order to achieve significant results that benefit all.
9. **Telling the story is vitally important for both cluster organization growth and motivation for the state.** It is important to keep supporters informed about different activities in different clusters. That way, when the time comes to reach out to policymakers, the information can come from the private sector and not just the organizing entity.
10. **Competitiveness is global; economic impact is local.** The economic impact numbers are important to make the case for industry influence, but competitiveness is about raising expectations as a state.

# Conclusion

South Carolina has made significant progress in the last 10 years—eight of those with the help of New Carolina. Business leaders created the organization out of concern that a focus on outside business recruitment was not sufficient for growth and prosperity in a global economy. Now when businesses are considering a move to South Carolina, recruitment agencies can use cluster development as a tool to identify existing networks of companies involved in industry and business environment growth. New Carolina leads the engagement through collaboration within industries, among cluster groups, and across the state on critical areas of focus. The result is a vibrant economy with forward-looking business leaders who collaborate with policymakers on actions to take that increase prosperity in South Carolina. Policymakers and practitioners can apply the lessons learned by New Carolina to their regions. However, each location needs to devise the right competitiveness strategy to leverage its unique mix of industry clusters and business environment conditions and, in turn, increase business growth, productivity, and new business formation.

# Appendix A: Progress Report on Competitiveness Recommendations

Although state leaders have never formally adopted cluster development as a comprehensive economic development strategy, great progress has been made on all the recommendations from the Strategic Plan for South Carolina. Here is a summary of progress since 2003:

1. **Create new institutions for economic development.** New Carolina was created as a direct result of the Strategic Plan and recommendations.
2. **Activate and upgrade clusters.** Today, there are two bi-state cluster initiatives with North Carolina (nuclear and engineering), 10 statewide cluster initiatives, and two regional cluster initiatives.
3. **Continue to enhance education and workforce development.** New Carolina formed an Education and Workforce Development Task Force. Co-chaired by two prominent CEOs, this is the only organization in the state that holds regular meetings on all public education interests. To help South Carolina move into the knowledge economy, the task force adopted five strategies:
  - Prepare children for success in school through increased parental involvement in schools and enhanced training for 0–K daycare providers.
  - Increase the pipeline from high school through the Education and Economic Development Act (EEDA), which has been renamed “Personal Pathways to Success.” This program established 16 occupational clusters and provided virtual job shadows and various opportunities for students to learn about different careers. Since its inception, high school graduation rates in South Carolina have improved to less than two points below the national average.<sup>38</sup>
  - Align higher education with economic development strategies.

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<sup>38</sup> “Educational Attainment,” *U.S. Census Bureau, 2007-2011 American Community Survey*. See Table (S1501) [http://factfinder2.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS\\_11\\_5YR\\_S1501&prodType=table](http://factfinder2.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS_11_5YR_S1501&prodType=table). For more on the Personal Pathways to Success program, see <http://www.scpathways.org>.

- Connect adults to education and training through the WorkKeys jobs skills assessment created by ACT,<sup>39</sup> apprenticeships, and the readySC workforce training program.<sup>40</sup>
  - Develop a culture for valuing education.
4. **Invest in research and the university system.** South Carolina created the Centers for Economic Excellence, now called SmartState. Today, there are 49 centers, with 35 endowed chairs for each and endowments of \$2 million to \$5 million per chair. The state's investment has brought in \$1.2 billion in outside funds and has created 7,000 jobs. One example is the Clemson University International Center for Auto Research (CU-ICAR), which has four endowed chairs and \$450 million in public and private funds. The school produced the nation's first doctoral program in automotive engineering. Additionally, the state passed the Innovation Centers Act and the Research Infrastructure Bond Act in 2004, which provided funds for three new research centers associated with Clemson, the University of South Carolina, and the Medical University of South Carolina, as well as \$220 million in general research funding. Finally, the state has reached out to establish business and research relationships with Israel, one of the most innovative countries in the world. Two trade missions have resulted in more than 100 new business and research relationships between Israel and South Carolina.
  5. **Launch internal and external marketing plans.** New Carolina has helped launch several campaigns, including a tourism marketing plan ("Time to Thaw"), a certified South Carolina agricultural products campaign ("Nothing Fresher, Nothing Finer"), a recycling marketing campaign, and branding for the New Carolina organization itself at [newcarolina.org](http://newcarolina.org).
  6. **Create an explicit economic development program for distressed areas.** New Carolina contracted to complete the plan with MDC (originally known as Manpower Development Corp.) in Raleigh, NC. The report is called *An Action Agenda to Spur Economic Success* and is located in the publications section of the New Carolina website.<sup>41</sup> Its major recommendation was to form something similar to the North Carolina Rural Center, and New Carolina has been trying to find strategic partners and grant money for implementation. The report also has been passed on to the implementers of a major initiative funded by federal grants for the I-95 corridor.
  7. **Increase support for startups and local firms.** New Carolina sponsors an annual competition with the Charleston Chamber of Commerce called "New Ideas for New Carolina." Nearly 1,000 business plans have been submitted over the last five years as a part of this competition. In addition, New Carolina, through the Entrepreneurship Task Force, has formed a Startups Committee that has held several conferences over the past four years, including:

<sup>39</sup> "WorkKeys," *SC Works*. See <http://www.toscc.org/WorkKeys.htm>.

<sup>40</sup> "About Us," *readySC™*. See <http://www.readysc.org/about.htm>.

<sup>41</sup> "Distressed Areas," *New Carolina*. See <http://www.newcarolina.org/initiatives/distressedareas.aspx>.

- A conversation on minority entrepreneurship with John Sibley Butler of the IC<sup>2</sup> Institute at The University of Texas at Austin.
  - A conversation on incubators with Diane Atkins of the National Business Incubation Association (NBIA).
  - A conversation on high-impact entrepreneurship with Eric Pages.
  - A rollout conference funded by the EDA highlighting high-impact entrepreneurs in South Carolina. As a result of this conference, a State Innovation Plan and a Capital Markets Plan have been developed, and a page on the South Carolina Department of Commerce website details resources available to startup companies.
8. **Measure progress in raising prosperity.** This is an ongoing challenge, but New Carolina hopes to launch a statewide competitiveness index to be consistently used for measurement. Most of the progress made in South Carolina and New Carolina is best explained through examples of success.

# Appendix B: South Carolina Cluster Summaries

The principal focus of New Carolina has been cluster initiatives. Its original work with the Competitiveness Initiative identified five clusters. In practice, this has grown to 15: two bi-state clusters, nine statewide clusters, and four regional initiatives.

1. **Advanced Materials (Composites).** An industry assessment was done in 2006, noting 140 companies largely centered in the Upstate region of South Carolina. New Carolina held the initial conference around this industry in 2007 and worked with industry leaders to develop an organized cluster in 2008. Lacking a driving agenda, the organized cluster failed to take root and now lies dormant.
2. **Advanced Security.** New Carolina worked with a large number of U.S. Department of Defense contractors in the Charleston region and many small cyber security firms to form a cluster initiative called ASTRA. This organization focuses on workforce development with the state technical college system and regional universities, and it is building a testing space for entrepreneurs to use when developing new technologies.
3. **Agribusiness.** Known as the Palmetto Agribusiness Council, this cluster is a \$34 billion industry with a goal of growing agribusiness to a \$50 billion industry by 2020. The Palmetto Agribusiness Council secured funding through the South Carolina Department of Agriculture for an economic developer at the South Carolina Department of Commerce (SCDoC) to recruit agricultural processing companies and to export agricultural products.
4. **Automotive.** The Automotive Council was formed under the South Carolina Manufacturers Alliance to reach out to auto manufacturers across the state. New Carolina holds a seat on that council and provides cluster development guidance.
5. **Aviation and Aerospace.** This cluster was originally centered in upstate South Carolina. There were 103 aviation companies when the cluster was mapped in 2006, but the efforts remained regional and largely unorganized. However, the location of Boeing's new facility in Charleston has reinvigorated the cluster. A Center of Excellence was created at University of South Carolina, and the SCDoC has formed an Aerospace Task Force to develop a strategic plan for aerospace in South Carolina. New Carolina is working closely with the task force chair to provide assistance.
6. **Creative.** In 2008, New Carolina and the Charleston Regional Development Alliance (CRDA)

convened a group of creative professionals to promote a cluster initiative. This occupational cluster accounts for 27,315 reported creative jobs in the region, or 7 percent of the region's total workforce. Creative professionals generated \$1.4 billion per year in gross sales in 2010, with average salaries above the regional average. The committee's action plan was to promote new enterprise development among creative firms and entrepreneurs, and convene working groups of key organizational stakeholders.

7. **Engineering.** The engineering cluster initiative has drawn attention to the more than 300 engineering companies in South Carolina. It also has launched initiatives to train teachers and encourage students to consider a career in engineering. New Carolina administers a South Carolina Department of Education grant for "Project Lead the Way," which works with schools and districts to support the implementation of effective science, technology, engineering, and mathematics (STEM) education programs.
8. **Hydrogen and Fuel Cells.** In 2005, ICF Consulting conducted a thorough, statewide analysis of South Carolina's next energy opportunities with hydrogen and fuel cells. The study showed that the hydrogen and fuel cell industry represented a significant knowledge-based market opportunity for the state. Leaders from business, higher education, research, and community sectors across South Carolina came together to develop a 20-year strategy and to focus the strengths of the state's competitive advantage in the industry. The goal of the strategy is for South Carolina to become a leader in the emerging hydrogen and fuel cell economy.
9. **Insurance Technology.** In 2006, New Carolina and the Greater Columbia Chamber of Commerce were approached by a group of insurance technology companies to address how the industry could raise awareness, strengthen its competitive position, and address workforce and talent development. Over the next two years, New Carolina worked with these companies to develop and build an economic development strategy for insurance technology and services. In 2008, the cluster organization officially launched under the Insurance Technology and Services South Carolina (iTs|SC) brand. Today, iTs|SC is a talent-rich economic development cluster activity of businesses, educational institutions, and industry professionals dedicated to expanding the Midlands<sup>42</sup> of South Carolina as a global destination for insurance and insurance technology services.
10. **Life Sciences.** SCBIO is a member organization that exists to support and advance South Carolina's life sciences industry through collaboration, advocacy, workforce development, and support for business operations. New Carolina sits on the board of SCBIO, and was involved in the development of the Medical Devices cluster that became a subcommittee of SCBIO.

<sup>42</sup> The Midlands encompasses Calhoun, Fairfield, Kershaw, Lexington, Orangeburg, Richland, Saluda, and Sumter counties. See Appendix F for a county-level map of South Carolina regions.

11. **Nuclear.** New Carolina started the Carolinas' Nuclear Cluster (the CNC) in September 2007 as a collaboration across companies, universities, technical colleges, and nonprofits to advance the nuclear industry in North Carolina and South Carolina. The Carolinas generate 11.5 percent of the nation's nuclear energy, and South Carolina's seven nuclear reactors supply 52 percent of its electricity generation needs, with two more reactors currently being constructed.
12. **Recycling.** New Carolina worked with the governor-appointed 14-member Recycling Market Development Advisory Council (RMDAC) to create the recycling cluster known as RecyclonomicsSC. It brings together businesses and industries that utilize recycled materials in their manufacturing processes. RecyclonomicsSC helps to promote recycling markets and to position recycling businesses as competitive participants in developing jobs, retaining local community employers, generating additional tax revenues, and increasing economic development opportunities.
13. **Textiles.** The textile industry still has a major presence in South Carolina as arguably the most innovative industry in the state. Milliken has produced 2,200 patents from its Spartanburg research lab, more than any private company in the United States. A 2007 study commissioned by New Carolina indicated that the state's Textiles cluster consists of over 900 establishments that employ nearly 65,000 people, with an establishment in each of South Carolina's 46 counties. These companies brought in over \$21 billion in annual revenue in 2007. New Carolina provided funding for the development of SC Textile Connect, which "connects" textile-related information on global events; products; markets; and government, industry, and academic sources within the South Carolina textile complex. New Carolina also held a conference in 2008 to present its research and to continue the discussion on the future of the industry.
14. **Tourism.** In November 2005, New Carolina's Tourism Cluster Committee commissioned a study by international consultant Michael MacNulty of Tourism Development International (TDI) to complete a Tourism Action Plan. It included a destination-specific marketing plan, in which South Carolina would match local funds on a \$1 to \$2 basis. This funding model has since been adopted by 30 states. New Carolina's Tourism Cluster Committee then became the South Carolina Tourism Alliance, which launched a marketing campaign called "Company's Coming." However, due to the recent economic downturn, the Alliance initiative became inactive.
15. **TDL Council.** Together the South Carolina Department of Transportation, SCDOT, South Carolina Ports Authority, New Carolina, and private sector industry leaders launched the TDL Council. The TDL Council brings public and private sector leaders together to eliminate major industry obstacles and roadblocks to competitiveness. The focus is on infrastructure, incentives, workforces, and directing focused investments into South Carolina's economy.

Figure 8: Summary of South Carolina Clusters

Cluster	Strategic Plan	Economic Impact Study	Legislative Initiatives	Funds Extended	Website
Advanced Materials (Composites)					<a href="http://newcarolina.org/clusters/composites.aspx">newcarolina.org/clusters/composites.aspx</a>
Advanced Security	X		Federal		<a href="http://charlestondca.org">charlestondca.org</a>
Agribusiness	X	X	State		<a href="http://newcarolina.org/clusters/agribusiness.aspx">newcarolina.org/clusters/agribusiness.aspx</a>
Automotive		X		X	<a href="http://scautomotivecouncil.com">scautomotivecouncil.com</a>
Aviation and Aerospace					<a href="http://newcarolina.org/clusters/aviationaerospace.aspx">newcarolina.org/clusters/aviationaerospace.aspx</a>
Creative	X	X	Local	X	<a href="http://charlestonparliament.com">charlestonparliament.com</a>
Engineering	X			X	<a href="http://southcarolinaengineering.org">southcarolinaengineering.org</a>
Hydrogen and Fuel Cells	X		State	X	<a href="http://schydrogen.org">schydrogen.org</a>
Insurance Technology	X			X	<a href="http://its-sc.com">its-sc.com</a>
Life Sciences	X				<a href="http://scbio.org">scbio.org</a>
Nuclear	X	X	Federal, State	X	<a href="http://newcarolina.org/clusters/nuclear.aspx">newcarolina.org/clusters/nuclear.aspx</a>
Recycling	X	X	State	X	<a href="http://recyclonomicssc.com">recyclonomicssc.com</a>
Textiles	X	X		X	<a href="http://sctextileconnect.com">sctextileconnect.com</a>
Tourism	X	X	Federal, State	X	<a href="http://newcarolina.org/clusters/tourism.aspx">newcarolina.org/clusters/tourism.aspx</a>
TDL Council	X	X	Federal, State	X	<a href="http://tdlcouncilsc.com">tdlcouncilsc.com</a>

# Appendix C: Smart Clusters

The SmartState Program™ conducts research in areas of critical importance to South Carolina and the world. There are six industry-focused Smart Clusters that are home to Centers of Economic Excellence and their SmartState Endowed Chairs. Each Smart Cluster offers opportunities for businesses, students, potential faculty, and the public to engage in its efforts.

## 1. Advanced Materials and Nanotechnology

- Advanced Fiber-Based Materials: <http://smartstatesc.org/advanced-fiber-based-materials>
- Experimental Nanoscale Physics: <http://smartstatesc.org/experimental-nanoscale-physics>
- Environmental Nanoscience and Risk: <http://smartstatesc.org/nanoenvironmental-research>
- Optical Materials: <http://smartstatesc.org/optical-materials>
- Polymer Nanocomposites: <http://smartstatesc.org/polymer-nanocomposites>

## 2. Automotive and Transportation

- Clemson University International Center for Automotive Research (CU-ICAR) Automotive Design and Development: <http://smartstatesc.org/automotive-design-and-development>
- CU-ICAR Automotive Manufacturing: <http://smartstatesc.org/automotive-manufacturing>
- CU-ICAR Automotive Systems Integration: <http://smartstatesc.org/automotive-systems-integration>
- Supply Chain Optimization and Logistics: <http://smartstatesc.org/supply-chain-optimization>
- CU-ICAR Vehicle Electronic Systems Integration: <http://smartstatesc.org/vehicle-electronic-systems-integration>
- CU-ICAR Automotive Systems Integration: <http://smartstatesc.org/automotive-systems-integration>

## 3. Biomedical

- Advanced Tissue Biofabrication: <http://smartstatesc.org/advanced-tissue-biofabrication>
- Brain Imaging: <http://smartstatesc.org/brain-imaging>
- Cancer Disparities: <http://smartstatesc.org/cancer-disparities>
- Childhood Neurotherapeutics: <http://smartstatesc.org/childhood-neurotherapeutics>
- Clinical Effectiveness and Patient Safety:

- <http://smartstatesc.org/clinical-effectiveness-and-patient-safety>
- Health Care Quality: <http://smartstatesc.org/health-care-quality>
- Health Facilities Design and Testing:  
<http://smartstatesc.org/health-facilities-design-and-testing>
- Inflammation and Fibrosis Research:  
<http://smartstatesc.org/inflammation-and-fibrosis-center-of-economic-excellence>
- Marine Genomics: <http://smartstatesc.org/marine-genomics>
- Molecular Proteomics in Cardiovascular Disease and Prevention:  
<http://smartstatesc.org/molecular-proteomics>
- Neuroscience: <http://smartstatesc.org/neuroscience>
- Proteomics: <http://smartstatesc.org/proteomics>
- Regenerative Medicine: <http://smartstatesc.org/regenerative-medicine>
- Rehabilitation and Reconstruction Sciences:  
<http://smartstatesc.org/rehabilitation-and-reconstruction-sciences>
- Renal Disease Biomarkers: <http://smartstatesc.org/renal-disease-biomarkers>
- SeniorSMART™: <http://smartstatesc.org/seniorsmart>
- Stroke: <http://smartstatesc.org/stroke>
- Technology Center to Advance Healthful Lifestyles:  
<http://smartstatesc.org/advance-healthful-lifestyles>
- Tobacco-Related Malignancies: <http://smartstatesc.org/tobacco-related-malignancies>
- Vision Science: <http://smartstatesc.org/vision-science>

#### 4. Future Fuels®

- Catalysis for Renewable Fuels: <http://smartstatesc.org/catalysis-for-renewable-fuels>
- General Atomics for the Development of Transformational Nuclear Technologies:  
<http://smartstatesc.org/general-atomics-center>
- Hydrogen and Fuel Cell Economy: <http://smartstatesc.org/hydrogen-and-fuel-cell>
- Nuclear Science and Energy: <http://smartstatesc.org/nuclear-science-and-energy>
- Solid Oxide Fuel Cells: <http://smartstatesc.org/solid-oxide-fuel-cells>
- Strategic Approaches to the Generation of Electricity:

<http://smartstatesc.org/strategic-approaches>

## 5. Information Science

- CyberInstitute: <http://smartstatesc.org/cyberinstitute>
- Data Analysis, Simulation, Imaging, and Visualization: <http://smartstatesc.org/data-analysis>
- Optoelectronics: <http://smartstatesc.org/optoelectronics>
- Sustainable Development: <http://smartstatesc.org/sustainable-development>
- Tourism and Economic Development:  
<http://smartstatesc.org/tourism-and-economic-development>
- Urban Ecology and Restoration: <http://smartstatesc.org/urban-ecology-and-restoration>

## 6. Pharmaceutical

- Cancer Drug Discovery: <http://smartstatesc.org/cancer-drug-discovery>
- Cancer Stem Cell Biology and Therapy: <http://smartstatesc.org/cancer-stem-cell-biology>
- Gastrointestinal Cancer Diagnostics:  
<http://smartstatesc.org/gastrointestinal-cancer-diagnostics>
- Lipidomics, Pathobiology, and Therapy:  
<http://smartstatesc.org/lipidomics-pathobiology-and-therapy>
- Medication Safety and Efficacy: <http://smartstatesc.org/medication-safety-and-efficacy>
- Translational Cancer Therapeutics: <http://smartstatesc.org/translational-cancer-therapeutics>

# Appendix D: In Depth—The Carolinas' Nuclear Cluster

By Scott Carlberg, Carolinas' Nuclear Cluster Manager

## Background: Importance of the Nuclear Industry in South Carolina

Across North Carolina and South Carolina, the nuclear generation industry has more than 37,000 employees, more than \$2 billion in annual payroll, more than \$4.5 billion in earned income, and more than \$750 million paid in state and local taxes. There are currently four nuclear plants under construction within three hours of Columbia, South Carolina, with a combined capital investment in excess of \$20 billion. Constructing these plants alone will employ, at the industry's peak, about 38,000 people in South Carolina. In addition, 15,000 of those are currently employed by the nuclear industry. Recent estimates are that nationally, 39 percent of nuclear employees will be eligible for retirement by 2018. The potential for employee turnover in South Carolina's nuclear industry is significant.

To address this cluster, New Carolina established the Carolinas' Nuclear Cluster (CNC), a two-state force. It is a collaboration of more than 50 companies, universities, technical colleges, and nonprofits that advances economic development in the Carolinas by strengthening the region's nuclear energy industry. The CNC builds on the area's strengths and economic and intellectual resources to spur economic development and innovation, and to attract likeminded industries by offering collaboration and proximity to key suppliers and customers. It works effectively to build on this competitive advantage in an industry poised for a growing global presence.

## How the Nuclear Cluster Began

In 2007, New Carolina approached Duke Energy Corporation with the concept of a nuclear cluster. The initial group of invitees was carefully selected through analyses of industry lists and supply chain maps. There was no general call to attend a meeting—rather, the organizers of the cluster conducted targeted interviews to get the best possible people together in a room. This tradition of actively managing membership, tasks, and messaging has been a constant in the CNC, keeping the discussion at a professional industry level. The members involved in the CNC know the industry and are long-term players for the success of the Carolinas' nuclear industry.

Leadership of the cluster comes from its own ranks, as a CNC member chairs the entire cluster for a two-year term starting September 1 of each odd-numbered year. Duke Energy provided the inaugural chair, Westinghouse provided the second chair, and URS Corporation provided the current chair, who

will be serving in this role until September 2013. AREVA will take the chairmanship next.

At the first meeting in 2007, the participants decided that the cluster initiative needed an informed direction. The CNC spent six months developing a strategic plan using neutral, external resources, commencing at the end of 2007. The plan combined industry research, economic development findings, and input from influential leaders in the industry, and it defined the cluster's structure and most critical activities. The planning process included interviews with stakeholders to gather information and to begin the bridge-building necessary to form a cohesive team. The CNC plan created five task forces to oversee a strategic area and define short-term objectives. Every cluster member belongs to a task force, each of which is chaired by a CNC member:

1. **Economic Development:** Defines supply chains and business development to expand the nuclear industry, demonstrating the CNC's capability to drive a regional network of companies that has a global reach.
2. **Workforce Development:** Works on the challenge of improving professional and craft education in the nuclear energy talent pipeline. It is necessary to provide for new workers and also replace a substantial portion of the existing workforce in the next few years as individuals retire.
3. **Technology Development:** Helps unify the region's research and development resources for the industry.
4. **Public Policy:** Analyzes policy issues that must be addressed to move the industry forward. This task force largely comprises senior management from nuclear energy organizations.
5. **Communications:** Provides support in shaping the cluster's basic communications and outreach, including media relations, messages, presentations, and other cluster activities. The outreach also targets the nuclear industry and CNC members.

The entire strategic plan was revised in 2011 as a "10-1-3 Plan": a visionary 10-year goal, with granular one-year goals and action items as well as three-year stretch objectives.

Aside from the professional and commercial gain, CNC members invest in their region's nuclear cluster primarily because they believe in the technology, their community, and the next generation of nuclear energy.

Figure 9: Membership in the Carolinas’ Nuclear Cluster

Utilities	Manufacturers
Duke Energy	ASCO Valve
SCANA	Pegasus Nuclear
Service Distributors	Tetra Tech
Carotek	Westinghouse
Global Quality Assurance	Engineering, Procurement, and Contractors
Hendrick Construction	AREVA
J-E-T-S Quality Consultants	Fluor
Qualitech Solutions	Generation mPower
RCS Corporation	The Shaw Group
Education	Toshiba America Nuclear Energy
Aiken Technical College	URS Corporation
Central Piedmont Community College	Zachry Nuclear Engineering
Clemson University	Government, Nonprofits, and Other
Francis Marion University	Electric Power Research Institute (EPRI)
Gaston College	EngenuitySC
Midlands Technical College	North Carolina Department of Commerce
North Carolina State University	Savannah River National Lab
South Carolina State University	Savannah River Site (SRS)
South Carolina Technical College System	SCUREF <sup>43</sup>
Spartanburg Community College	South Carolina Department of Commerce
University of North Carolina at Charlotte	South Carolina Research Association (SCRA)
University of South Carolina	SRS Community Reuse Organization
York Technical College	SUNRISE <sup>44</sup>

## Impact and Indicators of Success

The evidence of New Carolina’s success comes from the fact that private companies continue to invest in the organization because they believe it is worth their time and resources. Whereas many economic development strategies are government-driven—for example, incentives to attract branch manufacturing—the cluster efforts of New Carolina have largely been led by the private sector. Therefore, they are focused on what established companies in South Carolina believe is important to boost their collective competitiveness.

<sup>43</sup> SCUREF stands for the South Carolina Universities Research and Education Foundation.

<sup>44</sup> SUNRISE stands for the Southeast Universities Nuclear Reactors Institute for Science and Education.

For example, the CNC has seen dramatic growth over the last five years. Since 2007, the cluster has steadily grown from its original 18 organizational members to more than 50 today. Members include globally recognized leaders in nuclear technology, engineering, construction, utility operations, research, education, and small supply and service firms. They see membership in the CNC as a way to enhance their reputation, and high meeting attendance demonstrates that senior leadership in these organizations view the CNC as a worthwhile place to spend time.

This growth occurs amid strict criteria for membership, as there is no automatic membership. Maintaining a “high common denominator” in membership quality means that meetings dig deeply and meaningfully into critical issues with decision-makers at the table. To be considered for CNC membership, commercial organizations must have relevance to the industry in five of seven criteria:

**Figure 10: Criteria for Membership in the Carolinas’ Nuclear Cluster**

Trait	Criteria
Sales Revenues	\$1 million or above for the past calendar or fiscal year in the Carolinas’ nuclear firms
Full-time Employees	12 or more employees for more than 1 year in the Carolinas’ nuclear firms
Percent of Sales	25 percent or more for the past year to the Carolinas’ nuclear firms or to engineering firms for the Carolinas’ nuclear firms
Contracts	2 or more current contracts with a Carolinas’ nuclear firm or engineering firm that designs or maintains a facility
Longevity	5 or more years in business
Location	Corporate headquarters in the Carolinas or major branch headquarters representing a significant Carolinas’ capital investment for the firm
Reputation and Fit	A supplier in good standing with nuclear generators and major engineering firms, pending a review from cluster leadership, which makes the final call on membership

Educational institutions that apply for membership must have current curricula that are relevant to the needs of the Carolinas’ nuclear generation or engineering community.

The financial stability of the CNC is further evidence of its success. Members of the cluster initiative support its operation on a zero-based balance sheet. Membership fees are set on a sliding scale based on the revenues of the companies. Nonprofits have a special low rate to ensure that they have entry as well as “skin in the game.” Budgets are set for the year for basic operations, and special events and programs must be financially self-sustaining. The financial sustainability of the cluster organization is evidence that the industry sees it as a good investment.

Additionally, credible third parties outside of the cluster have recognized the cluster organization:

- The U.S. Small Business Administration awarded one of its 10 “Innovative Economies” contracts of \$1.2 million over two years to New Carolina for the CNC in August 2010. There were 137 applications for these contracts nationwide, which are provided to build the small business supply chain in strategic industries. The CNC was the only Southeast award and the only award in an energy generation source. (The next closest energy award was for a Smart Grid in Illinois.) This has been seen as a million-dollar vote of confidence in the CNC.
- Economic developers have called upon the CNC to be part of senior management meetings when relocation candidates have looked at the Carolinas. The CNC is meeting with the secretaries from the South Carolina Department of Commerce and North Carolina Department of Commerce to review the new CNC strategic plan and to discuss partnership activities for business recruiting.
- International recognition has increased. The CNC manager has helped arrange meetings with energy contingents from France and the United Kingdom. The CNC was asked to share best practices with a business and economic development group from the United Arab Emirates, a nation that intends to build out its industry. Nuclear energy conferences regularly take place in the Carolinas. The London-based Nuclear Energy Insider has held more than a dozen meetings in Charlotte and Columbia after moving from its initial Washington location in 2009. More than 2,000 participants are estimated to have attended these sessions in the Carolinas. The CNC helps place panelists and chooses CNC members as emcees for the events. News organizations and trade groups routinely contact the CNC for information or sources of information.
- News stories featuring the CNC have appeared in many local press outlets in the Carolinas, as well as in *USA Today* and *Site Selection*.

The goal of the CNC is to double the nuclear workforce in the Carolinas in 20 years. Success will be measured in new full-time equivalents (FTEs) and dollar investments in the states by nuclear energy-oriented firms. A baseline economic impact study was conducted in 2009. It measured the total impact from employment associated with the generation of electricity at seven nuclear stations in North Carolina and South Carolina, and employment at Savannah River and Barnwell sites. Researchers at Clemson University used purchases and payroll data from these businesses in their evaluation.

The follow-up study, which is due to be completed in 2013, also will look at:

- Payroll and workforce growth.
- Increased candidates for the workforce from the Carolinas’s universities. The cluster includes major universities with nuclear or energy engineering programs, as well as technical colleges with nuclear craft programs. Filling and graduating the pipeline will take several years.

- New technologies transferred from universities to Carolinas-based nuclear or nuclear-related organizations. A well-established technology network started in 2011.
- New nuclear or nuclear-related businesses or organizations relocating to the Carolinas. This will be measured in several ways, including: the number of economic development organizations with a nuclear-related strategy for recruitment or expansion; and the number of firms that are (1) relocating, (2) making major additions of employees, or (3) expanding a product or service line into the nuclear or nuclear-related field.

Although these measures will take time to be proven quantitatively, the early consensus is that they will be positive. "Our Nuclear cluster is both an important source of energy to residents and businesses, as well as a major player in Carolinas' job and income creation," said Mark Henry, study researcher and co-coordinator of the Regional Economic Development Research Laboratory at Clemson University. He added, "This study does not count the out-of-Carolinas nuclear energy work by large engineering firms in the cluster, so the study estimates of the economic impacts are quite conservative."

The nuclear energy industry provides a positive economic impact through its payroll and supply chain purchases. "These business relationships span the world. Our engineers and energy experts routinely do projects in other nations, bringing back dollars to the Carolinas," said Mark Fecteau, president and CEO of Westinghouse-Japan, which is formerly based in Columbia, South Carolina as a corporate lead in innovation. Fecteau is also the immediate past chair of the cluster, as the CNC transitioned to URS Corporation on September 1, 2011.

# Appendix E: South Carolina Competitiveness Network Pilot Agenda

February 27, 2013, 10:00am-2:30pm  
 MASC Board Room, 1<sup>st</sup> Floor, 1411 Gervais Street, Columbia, SC

10:00	Introduction and Welcome from Neil McLean
10:15	Peer Learning Panel: "Q&A with Managers from Three of South Carolina's Most Successful Cluster Initiatives" <ul style="list-style-type: none"> <li>• Neil McLean, Facilitator</li> <li>• Tiffany Davis, TDL Council</li> <li>• Scott Carlberg, CNC</li> <li>• Jack Schuler, SC Agribusiness Council</li> </ul>
11:30	Break
11:45	"U.S. Cluster Mapping Project: Presentation of Lessons Learned in Other Regions" <ul style="list-style-type: none"> <li>• George Fletcher</li> </ul>
12:15	Lunch Presentation: "U.S. Cluster Mapping Website: Cluster Tool Kit" <ul style="list-style-type: none"> <li>• Neil McLean</li> </ul>
1:00	Group Discussion: "How Do You Measure Success in Your Cluster?" <ul style="list-style-type: none"> <li>• Laura McKinney</li> </ul>
1:45	Action Items, Lessons Learned, and Next Steps <ul style="list-style-type: none"> <li>• All Presenters</li> </ul>
2:30	Meeting Adjourned

## Invitees

Note: This list is composed primarily of cluster practitioners who have been actively engaged with New Carolina. The list is not intended to be exclusive. Please let us know if you have ideas for others who should be involved, and we will add them to our list for future meetings.

### Cluster Leaders

- Lee Stogner – Engineering

- Scott Carlberg – Carolinas Nuclear Cluster
- Robert Prioleau, Gary Collins, and Lee Deas – Creative
- Meghan Hughes – NuHub
- Shannon-Baxter Clemmons – South Carolina Hydrogen and Fuel Cell Alliance
- Tiffany Davis – TDL<sup>45</sup> Council and Insurance Technology and Services South Carolina (iTs|SC)
- Steve Warner – Charleston Regional Development Alliance (CRDA)
- Jack Shuler – Palmetto Agribusiness Council
- Wayne Roper – SCBIO
- Charlie Farrell – Aerospace
- Erin Ford – Upstate South Carolina Alliance – Energy
- Aimee Redick – Upstate South Carolina Alliance – Auto
- Elizabeth Feather – Upstate South Carolina Alliance
- Jack Moore – Advanced Security
- Lewis Gossett – South Carolina Automotive Council
- Lonnie Emard – IT-oLogy
- George Fletcher – RecyclonomicsSC

#### New Carolina

- Laura McKinney
- Neil McLean
- Moryah Jackson
- Jennifer Haigler

#### Other Representatives (not invited to this initial meeting)

- South Carolina Economic Developers' Association (SCEDA)
- South Carolina Department of Commerce
- South Carolina Manufacturing Extension Partnership (SCMEP)
- readySC

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<sup>45</sup> The "TDL" in TDL Council stands for Transportation Distribution Logistics.

## Workshop Session Details

### Peer Learning Panel: "Q&A with Managers from Three of South Carolina's Most Successful Cluster Initiatives"

#### Background and Overview

- How did your cluster get started?
- What types of companies are involved?
- What is your top focus area?

#### Membership Structure

- How do you recruit new cluster members?
- What is the cost to join?
- Do you have different types of members?

#### Meeting Structure

- Talk about a typical meeting.
- How is it run? By whom?
- Do you use committees?
- Do you have committee meetings separate from your regular meetings?
- What is considered your greatest success?

### "U.S. Cluster Mapping Project: Presentation of Lessons Learned in Other Regions"

- Who are the project participants?
- What are the goals of the project?
- What have we learned about the successes and failures of clusters in other regions in the United States?

### "U.S. Cluster Mapping Website: Cluster Tool Kit"

- Overview of the site
- How does New Carolina use the site?
- Data features

- What's next?

### Group Discussion: "How Do You Measure Success in Your Cluster?"

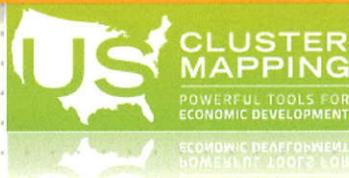
- How do you know if you have had a successful year?
- What metrics do you track, if any? Membership? Revenue? Project activity?
- What kind of data do you need from New Carolina?

# Appendix F: County Map of South Carolina



General definitions for regional areas of South Carolina included in this report:

- **Upstate:** Abbeville, Anderson, Cherokee, Greenville, Greenwood, Laurens, Oconee, Pickens, Spartanburg, and Union
- **Midlands:** Calhoun, Fairfield, Kershaw, Lexington, Orangeburg, Richland, Saluda, and Sumter
- **Lowcountry:** Not a consistently defined group, but usually includes Beaufort, Berkeley, Charleston, Colleton, Dorchester, Hampton, and Jasper
- **Pee Dee:** Chesterfield, Darlington, Dillon, Florence, Marion, and Marlboro



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## Budget Narrative File(s)

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\* **Mandatory Budget Narrative Filename:**

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To add more Budget Narrative attachments, please use the attachment buttons below.

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Center for International Business Education (CIBE)  
University of South Carolina  
October 1, 2014 - September 30, 2015

Year 1 of 4 Year Grant

	DOE	USC	TOTAL
Total Direct Costs	\$337,500	\$337,500	\$675,000
Indirect Costs @ 8%	\$27,000	\$27,000	\$54,000
<b>TOTAL</b>	<b>\$364,500</b>	<b>\$364,500</b>	<b>\$729,000</b>

**BUDGET SUMMARY: US DEPARTMENT OF EDUCATION FUNDS**

	DOE	USC	TOTAL
Personnel	0	224,989	224,989
Fringes	0	55,061	55,061
Travel	170,500	37,500	208,000
Equipment	0	0	0
Supplies	3,000	700	3,700
Contractual	0	0	0
Construction	0	0	0
Other	164,000	19,250	183,250
<b>Total Direct</b>	<b>337,500</b>	<b>337,500</b>	<b>675,000</b>
Indirect	27,000	27,000	54,000
Training Stipends	0	0	0
<b>TOTAL</b>	<b>\$364,500</b>	<b>\$364,500</b>	<b>\$729,000</b>

Center for International Business Education (CIBE)  
University of South Carolina  
October 1, 2014 - September 30, 2015

	DOE	USC	TOTAL
<b>Center Administration</b>			
<b>Personnel</b>			
Executive Director (25% T&E)	0	64,496	64,496
Director (75% T&E)	0	60,750	60,750
Research Director (10% T&E)	0	20,158	20,158
Outreach Director (10% T&E)	0	17,555	17,555
Fringe Benefits	0	40,292	40,292
<b>Travel</b>			
Foreign	9,000	0	9,000
Domestic	3,000	0	3,000
Supplies	1,000	200	1,200
Other			
Databases & Websites	2,500	0	2,500
<b>Subtotal</b>	<b>\$15,500</b>	<b>\$203,451</b>	<b>\$218,951</b>
<b>GRADUATE 1. Master of International Business (MIB)</b>			
<b>Travel</b>			
Foreign	5,000	4,000	9,000
<b>Sub-Total</b>	<b>\$5,000</b>	<b>\$4,000</b>	<b>\$9,000</b>
<b>GRADUATE 2. International MBA (IMBA) Program</b>			
<b>Other</b>			
Curriculum Development	0	0	\$0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>GRADUATE 3. International MBA (IMBA) Program - Russian Track</b>			
<b>Travel</b>			
Foreign	4,000	0	4,000
<b>Sub-Total</b>	<b>\$4,000</b>	<b>\$0</b>	<b>\$4,000</b>
<b>GRADUATE 4. International MBA (IMBA) Program - EGADE Business School Dual Degree</b>			
<b>Travel</b>			
Foreign	2,000	2,000	4,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$2,000</b>	<b>\$4,000</b>

	DOE	USC	TOTAL
<b>GRADUATE 5. International MBA (IMBA) Program - Cultural-Institutional Assessment Course Module</b>			
Other			
Curriculum Development	1,000	1,000	2,000
<b>Sub-Total</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$2,000</b>
<b>GRADUATE 6. International MBA (IMBA) Program - Language Track Assessment Procedures</b>			
Other			
Curriculum Development (Assessment)	2,500	0	2,500
<b>Sub-Total</b>	<b>\$2,500</b>	<b>\$0</b>	<b>\$2,500</b>
<b>GRADUATE 7. International MBA (IMBA) Program - Text Analytics Training</b>			
Other			
Training and Application	10,000	0	10,000
<b>Sub-Total</b>	<b>\$10,000</b>	<b>\$0</b>	<b>\$10,000</b>
<b>GRADUATE 8. One Year MBA Program - University of New South Wales Dual Degree</b>			
Travel			
Foreign	2,500	2,000	4,500
<b>Sub-Total</b>	<b>\$2,500</b>	<b>\$2,000</b>	<b>\$4,500</b>
<b>GRADUATE 9. Professional MBA - International Business Certificate and STSA Development</b>			
Travel			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>PhD 1. Doctoral Student Education - International Dual Degree PhD Programs (Cotutelle)</b>			
Travel			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>UNDERGRADUATE 1. Cohort Program - International Business and Chinese Enterprise (IBCE)</b>			
Travel			
Foreign	0	2,500	2,500
<b>Sub-Total</b>	<b>\$0</b>	<b>\$2,500</b>	<b>\$2,500</b>
<b>UNDERGRADUATE 2. Cohort Program Development - Critical and Foreign Languages</b>			
Travel			
Foreign			
Arabic (American University in Cairo)	0	0	0
Portuguese (TDB - Brazil)	0	2,000	2,000
French (Université Paris-Dauphine)	3,000	2,000	5,000
German (Universität Mannheim)	3,000	2,000	5,000
Spanish (Univ. de Chile - Santiago)	0	2,000	2,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$8,000</b>	<b>\$14,000</b>
<b>UNDERGRADUATE 3. Cohort Program Development - Multi-Country Thematic-Based Programs</b>			
Program 1: Moore School, New New South Wales, Australian School of Business, CUHK-Shenzhen			
Program 1: Moore School, Mannheim, ESSEC-Singapore, Fundacao Getulio Vargas-Rio de Janeiro			
Travel			
Foreign	5,000	10,000	15,000
<b>Sub-Total</b>	<b>\$5,000</b>	<b>\$10,000</b>	<b>\$15,000</b>
<b>UNDERGRADUATE 4. International Business Major - Language Assessment Procedures</b>			
Other			
Curriculum Development (Assessment)	1,500	0	1,500
<b>Sub-Total</b>	<b>\$1,500</b>	<b>\$0</b>	<b>\$1,500</b>
<b>UNDERGRADUATE 5. International Business Major - International Business Career Day</b>			
Other			
Curriculum Development	2,000	2,000	4,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$2,000</b>	<b>\$4,000</b>
<b>UNDERGRADUATE 6. Functional Major Programs - Functional Department Corporate Boards</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>UNDERGRADUATE 7. Functional Major Programs - Development of STSA Programs</b>			
Travel			
Foreign	5,000	9,000	14,000
<b>Sub-Total</b>	<b>\$5,000</b>	<b>\$9,000</b>	<b>\$14,000</b>

	DOE	USC	TOTAL
<b>BUSINESS 1. Outreach to Businesses/Government - Regional/SC Cluster &amp; Economic Development</b>			
Comparative Institutional Analysis			
Personnel (1 Faculty @ 10%)	0	17,555	17,555
Fringe Benefits	0	4,180	4,180
Travel			
Foreign	32,000	0	32,000
Domestic	3,000	0	3,000
<b>Sub-Total</b>	<b>\$35,000</b>	<b>\$21,735</b>	<b>\$56,735</b>
<b>BUSINESS 2. Outreach to Businesses/Government - Export-Market Entry Studies Initiative</b>			
Other			
Data Acquisition and Materials	2,000	0	2,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$0</b>	<b>\$2,000</b>
<b>BUSINESS 3. Outreach to Businesses/Government - Executive Programs (Customized &amp; Public)</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 1. National/Regional Outreach - MSI Internationalization Initiative</b>			
Travel			
Foreign			
Faculty (STSA)	0	0	0
Student (STSA)	0	0	0
Other (FDIB, Mentor Program and Paper Workshop)			
Personnel (2 Faculty Instructors)	10,000	0	10,000
Fringe Benefits	0	0	0
Travel			
Domestic	3,000	0	3,000
Conference Venue	12,000	0	12,000
<b>Sub-Total</b>	<b>\$25,000</b>	<b>\$0</b>	<b>\$25,000</b>
<b>OUTREACH 2. National/Regional Outreach - Annual International Business Research Conference</b>			
Personnel: Faculty -- International Business	0	0	0
Fringe Benefits	0	0	0
Other			
Conference Venue	12,000	2,000	14,000
Participant Travel	6,000	1,000	7,000
Materials	1,500	500	2,000
Printing and Postage	500	500	1,000
Honoraria	2,000	0	2,000
<b>Sub-Total</b>	<b>\$22,000</b>	<b>\$4,000</b>	<b>\$26,000</b>
<b>OUTREACH 3. National/Regional Outreach - Culture and Finance Conference in association with the <i>Journal of Corporate Finance</i></b>			
Personnel: Faculty -- Foreign Language	0	0	0
Fringe Benefits	0	0	0
Other			
Conference Venue	15,000	2,000	17,000
Participant Travel	6,000	1,000	7,000
Materials	1,500	0	1,500
Printing and Postage	1,500	250	1,750
Honoraria	5,000	0	5,000
<b>Sub-Total</b>	<b>\$29,000</b>	<b>\$3,250</b>	<b>\$32,250</b>
<b>OUTREACH 4. National/Regional Outreach - Faculty Development in International Business (FDIB) - Scholarship Assistance to Business Faculty (MSI &amp; Community College Faculty)</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)	10,000	0	10,000
<b>Sub-Total</b>	<b>\$10,000</b>	<b>\$0</b>	<b>\$10,000</b>
<b>OUTREACH 5. National/Regional Outreach - Faculty Development in International Business (FDIB) New Courses Development</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 6. National/Regional Outreach - FDIB-Sub-Saharan Africa Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	6,000	0	6,000
Program Fees	15,000	0	15,000
<b>Sub-Total</b>	<b>\$21,000</b>	<b>\$0</b>	<b>\$21,000</b>

	DOE	USC	TOTAL
<b>OUTREACH 7. National/Regional Outreach - FDIB-MENA Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	0	0	0
Program Fees	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 8. National/Regional Outreach - FDIB-China/Hong Kong Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	2,000	0	2,000
Program Fees	4,000	0	4,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$0</b>	<b>\$6,000</b>
<b>OUTREACH 9. National/Regional Outreach - Workshop on Teaching Spanish for International Business for Professors of Spanish</b>			
Personnel: Summer Faculty	0	0	0
Fringe Benefits	0	0	0
Other			
Instruction: Foreign Language	0	0	0
Participant Travel	0	0	0
Materials	500	500	1,000
Printing and Postage	1,000	500	1,500
Outreach Scholarships	0	0	0
<b>Sub-Total</b>	<b>\$1,500</b>	<b>\$1,000</b>	<b>\$2,500</b>
<b>OUTREACH 10. National/Regional Outreach - USC Summer Language Institute (SLI)</b>			
Other			
Curriculum Development	7,000	0	7,000
<b>Sub-Total</b>	<b>\$7,000</b>	<b>\$0</b>	<b>\$7,000</b>
<b>OUTREACH 11. National/Regional Outreach - CIBE Business Language Conference Consortium</b>			
Travel			
Domestic			
MSI & CC Faculty	3,000	0	3,000
Other			
Outreach Scholarships (MSI & CC Faculty)	2,500	0	2,500
Consortium Sponsorship	3,000	0	3,000
<b>Sub-Total</b>	<b>\$8,500</b>	<b>\$0</b>	<b>\$8,500</b>
<b>OUTREACH 12. National/Regional Outreach - CUIBE and GBSN Membership Support</b>			
Other			
CUIBE Steering Committee	0	2,000	2,000
GBSN Membership	0	5,000	5,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$7,000</b>	<b>\$7,000</b>
<b>OUTREACH 13. National/Regional Outreach - Collaboration with International Magnet Middle/High Schools</b>			
Other			
Annual Workshop	2,000	0	2,000
Ambassador Program	0	1,000	1,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$1,000</b>	<b>\$3,000</b>
<b>RESEARCH THEME 1. Comparative Corporate Governance, Institutions and Global Strategy</b>			
Personnel (4 Faculty @ 2.5%)	0	15,000	15,000
Fringe Benefits	0	3,572	3,572
Travel			
Foreign	30,000	0	30,000
Domestic	3,000	0	3,000
Supplies	0	0	0
Other			
Databases	2,000	0	2,000
<b>Sub-Total</b>	<b>\$35,000</b>	<b>\$18,572</b>	<b>\$53,572</b>
<b>RESEARCH THEME 2. Industry Clusters, Innovation and Global Competitiveness</b>			
Personnel (4 Faculty @ 2.5%)	0	15,000	15,000
Fringe Benefits	0	3,572	3,572
Travel			
Foreign	20,000	0	20,000
Domestic	2,000	0	2,000
Supplies	1,000	0	1,000
Other			
Databases	2,000	0	2,000
<b>Sub-Total</b>	<b>\$25,000</b>	<b>\$18,572</b>	<b>\$43,572</b>

	DOE	USC	TOTAL
<b>RESEARCH THEME 3. Managing Global Political Risk and Legitimacy of MNCs - Africa Focus</b>			
Personnel (3 Faculty @ 2.5%)	0	11,250	11,250
Fringe Benefits	0	2,679	2,679
Travel			
Foreign	24,000	0	24,000
Domestic	2,000	0	2,000
Supplies	0	0	0
Other			
Databases	4,000	0	4,000
<b>Sub-Total</b>	<b>\$30,000</b>	<b>\$13,929</b>	<b>\$43,929</b>
<b>RESEARCH 13. Competitive International Business Research Program - CIBER Scholars</b>			
Personnel	0	0	0
Fringe Benefits	0	0	0
Travel			
Foreign	10,000	0	10,000
Domestic	0	0	0
Supplies	0	0	0
Other			
Databases	3,000	0	3,000
Printing and Postage	0	0	0
<b>Sub-Total</b>	<b>\$13,000</b>	<b>\$0</b>	<b>\$13,000</b>
<b>PROJECT EVALUATION. Evaluation and Assessment of CIBER Programs and Activities</b>			
Personnel (1 USC Staff @ 5%)	0	3,225	3,225
Fringe Benefits	0	768	768
Supplies	1,000	500	1,500
Other			
Honoraria for Evaluators	0	0	0
Travel for Evaluators	0	0	0
Databases/Surveys	2,500	0	2,500
<b>Sub-Total</b>	<b>\$3,500</b>	<b>\$4,493</b>	<b>\$7,993</b>

Center for International Business Education (CIBE)  
University of South Carolina  
October 1, 2015 - September 30, 2016

Year 2 of 4 Year Grant

	DOE	USC	TOTAL
Total Direct Costs	\$337,950	\$337,950	\$675,900
Indirect Costs @ 8%	\$27,035	\$27,035	\$54,070
<b>TOTAL</b>	<b>\$364,985</b>	<b>\$364,985</b>	<b>\$729,970</b>

**BUDGET SUMMARY: US DEPARTMENT OF EDUCATION FUNDS**

	DOE	USC	TOTAL
Personnel	4,000	231,737	235,737
Fringes	0	56,513	56,513
Travel	194,500	31,500	226,000
Equipment	0	0	0
Supplies	3,500	1,500	5,000
Contractual	0	0	0
Construction	0	0	0
Other	135,950	16,700	152,650
<b>Total Direct</b>	<b>337,950</b>	<b>337,950</b>	<b>675,900</b>
Indirect	27,035	27,035	54,070
Training Stipends	0	0	0
<b>TOTAL</b>	<b>\$364,985</b>	<b>\$364,985</b>	<b>\$729,970</b>

Center for International Business Education (CIBE)  
University of South Carolina  
October 1, 2015 - September 30, 2016

	DOE	USC	TOTAL
<b>Center Administration</b>			
<b>Personnel</b>			
Executive Director (25% T&E)	0	66,430	66,430
Director (75% T&E)	0	62,573	62,573
Research Director (10% T&E)	0	20,763	20,763
Outreach Director (10% T&E)	0	18,082	18,082
Fringe Benefits	0	41,300	41,300
<b>Travel</b>			
Foreign	8,000	0	8,000
Domestic	1,000	0	1,000
Supplies	500	1,000	1,500
Other			
Databases & Websites	0	0	0
<b>Subtotal</b>	<b>\$9,500</b>	<b>\$210,147</b>	<b>\$219,647</b>
<b>GRADUATE 1. Master of International Business (MIB)</b>			
<b>Travel</b>			
Foreign	4,000	4,000	8,000
<b>Sub-Total</b>	<b>\$4,000</b>	<b>\$4,000</b>	<b>\$8,000</b>
<b>GRADUATE 2. International MBA (IMBA) Program</b>			
<b>Other</b>			
Curriculum Development	0	0	\$0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>GRADUATE 3. International MBA (IMBA) Program - Russian Track</b>			
<b>Travel</b>			
Foreign	0	1,500	1,500
<b>Sub-Total</b>	<b>\$0</b>	<b>\$1,500</b>	<b>\$1,500</b>
<b>GRADUATE 4. International MBA (IMBA) Program - EGADE Business School Dual Degree</b>			
<b>Travel</b>			
Foreign	0	3,000	3,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$3,000</b>	<b>\$3,000</b>

	DOE	USC	TOTAL
<b>GRADUATE 5. International MBA (IMBA) Program - Cultural-Institutional Assessment Course Module</b>			
Other			
Curriculum Development	1,000	2,000	3,000
<b>Sub-Total</b>	<b>\$1,000</b>	<b>\$2,000</b>	<b>\$3,000</b>
<b>GRADUATE 6. International MBA (IMBA) Program - Language Track Assessment Procedures</b>			
Other			
Curriculum Development (Assessment)	2,200	0	2,200
<b>Sub-Total</b>	<b>\$2,200</b>	<b>\$0</b>	<b>\$2,200</b>
<b>GRADUATE 7. International MBA (IMBA) Program - Text Analytics Training</b>			
Other			
Training and Application	10,000	0	10,000
<b>Sub-Total</b>	<b>\$10,000</b>	<b>\$0</b>	<b>\$10,000</b>
<b>GRADUATE 8. One Year MBA Program - University of New South Wales Dual Degree</b>			
Travel			
Foreign	0	3,000	3,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$3,000</b>	<b>\$3,000</b>
<b>GRADUATE 9. Professional MBA - International Business Certificate and STSA Development</b>			
Travel			
Foreign	2,000	0	2,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$0</b>	<b>\$2,000</b>
<b>PhD 1. Doctoral Student Education - International Dual Degree PhD Programs (Cotutelle)</b>			
Travel			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>UNDERGRADUATE 1. Cohort Program - International Business and Chinese Enterprise (IBCE)</b>			
Travel			
Foreign	0	5,000	5,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$5,000</b>	<b>\$5,000</b>
<b>UNDERGRADUATE 2. Cohort Program Development - Critical and Foreign Languages</b>			
Travel			
Foreign			
Arabic (American University in Cairo)	0	0	0
Portuguese (TDB - Brazil)	2,000	2,000	4,000
French (Université Paris-Dauphine)	2,000	2,000	4,000
German (Universität Mannheim)	2,000	2,000	4,000
Spanish (Univ. de Chile - Santiago)	0	2,000	2,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$8,000</b>	<b>\$14,000</b>
<b>UNDERGRADUATE 3. Cohort Program Development - Multi-Country Thematic-Based Programs</b>			
Program 1: Moore School, New South Wales, Australian School of Business, CUHK-Shenzhen			
Program 1: Moore School, Mannheim, ESSEC-Singapore, Fundacao Getulio Vargas-Rio de Janeiro			
Travel			
Foreign	5,000	5,000	10,000
<b>Sub-Total</b>	<b>\$5,000</b>	<b>\$5,000</b>	<b>\$10,000</b>
<b>UNDERGRADUATE 4. International Business Major - Language Assessment Procedures</b>			
Other			
Curriculum Development (Assessment)	1,500	0	1,500
<b>Sub-Total</b>	<b>\$1,500</b>	<b>\$0</b>	<b>\$1,500</b>
<b>UNDERGRADUATE 5. International Business Major - International Business Career Day</b>			
Other			
Curriculum Development	1,000	1,000	2,000
<b>Sub-Total</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$2,000</b>
<b>UNDERGRADUATE 6. Functional Major Programs - Functional Department Corporate Boards</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>UNDERGRADUATE 7. Functional Major Programs - Development of STSA Programs</b>			
Travel			
Foreign	3,000	2,000	5,000
<b>Sub-Total</b>	<b>\$3,000</b>	<b>\$2,000</b>	<b>\$5,000</b>

	DOE	USC	TOTAL
<b>BUSINESS 1. Outreach to Businesses/Government - Regional/SC Cluster &amp; Economic Development</b>			
Comparative Institutional Analysis			
Personnel (1 Faculty @ 10%)	0	18,082	18,082
Fringe Benefits	0	4,305	4,305
Travel			
Foreign	50,000	0	50,000
Domestic	5,000	0	5,000
<b>Sub-Total</b>	<b>\$55,000</b>	<b>\$22,387</b>	<b>\$77,387</b>
<b>BUSINESS 2. Outreach to Businesses/Government - Export-Market Entry Studies Initiative</b>			
Other			
Data Acquisition and Materials	2,000	0	2,000
<b>Sub-Total</b>	<b>2,000</b>	<b>\$0</b>	<b>\$2,000</b>
<b>BUSINESS 3. Outreach to Businesses/Government - Executive Programs (Customized &amp; Public)</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 1. National/Regional Outreach - MSI Internationalization Initiative</b>			
Travel			
Foreign			
Faculty (STSA)	10,000	0	10,000
Student (STSA)	7,500	0	7,500
Other (FDIB, Mentor Program and Paper Workshop)			
Personnel (2 Faculty Instructors)	0	0	0
Fringe Benefits	0	0	0
Travel			
Domestic	2,500	0	2,500
Conference Venue	0	0	0
<b>Sub-Total</b>	<b>\$20,000</b>	<b>\$0</b>	<b>\$20,000</b>
<b>OUTREACH 2. National/Regional Outreach - Annual International Business Research Conference</b>			
Personnel: Faculty -- International Business	0	0	0
Fringe Benefits	0	0	0
Other			
Conference Venue	10,000	2,500	12,500
Participant Travel	6,000	1,000	7,000
Materials	1,500	700	2,200
Printing and Postage	500	500	1,000
Honoraria	2,000	0	2,000
<b>Sub-Total</b>	<b>\$20,000</b>	<b>\$4,700</b>	<b>\$24,700</b>
<b>OUTREACH 3. National/Regional Outreach - Culture and Finance Conference in association with the <i>Journal of Corporate Finance</i></b>			
Personnel: Faculty -- Foreign Language	0	0	0
Fringe Benefits	0	0	0
Other			
Conference Venue	0	0	0
Participant Travel	0	0	0
Materials	0	0	0
Printing and Postage	0	0	0
Honoraria	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 4. National/Regional Outreach - Faculty Development in International Business (FDIB) - Scholarship Assistance to Business Faculty (MSI &amp; Community College Faculty)</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)	15,000	0	15,000
<b>Sub-Total</b>	<b>\$15,000</b>	<b>\$0</b>	<b>\$15,000</b>
<b>OUTREACH 5. National/Regional Outreach - Faculty Development in International Business (FDIB) New Courses Development</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 6. National/Regional Outreach - FDIB-Sub-Saharan Africa Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	6,000	0	6,000
Program Fees	13,500	0	13,500
<b>Sub-Total</b>	<b>\$19,500</b>	<b>\$0</b>	<b>\$19,500</b>

	DOE	USC	TOTAL
<b>OUTREACH 7. National/Regional Outreach - FDIB-MENA Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	6,000	0	6,000
Program Fees	9,000	0	9,000
<b>Sub-Total</b>	<b>\$15,000</b>	<b>\$0</b>	<b>\$15,000</b>
<b>OUTREACH 8. National/Regional Outreach - FDIB-China/Hong Kong Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	2,000	0	2,000
Program Fees	4,000	0	4,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$0</b>	<b>\$6,000</b>
<b>OUTREACH 9. National/Regional Outreach - Workshop on Teaching Spanish for International Business for Professors of Spanish</b>			
Personnel: Summer Faculty	4,000	0	4,000
Fringe Benefits	0	0	0
Other			
Instruction: Foreign Language	8,000	0	8,000
Participant Travel	2,000	0	2,000
Materials	500	500	1,000
Printing and Postage	250	500	750
Outreach Scholarships	8,000	0	8,000
<b>Sub-Total</b>	<b>\$22,750</b>	<b>\$1,000</b>	<b>\$23,750</b>
<b>OUTREACH 10. National/Regional Outreach - USC Summer Language Institute (SLI)</b>			
Other			
Curriculum Development	6,000	0	6,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$0</b>	<b>\$6,000</b>
<b>OUTREACH 11. National/Regional Outreach - CIBE Business Language Conference Consortium</b>			
Travel			
Domestic			
MSI & CC Faculty	3,000	0	3,000
Other			
Outreach Scholarships (MSI & CC Faculty)	2,500	0	2,500
Consortium Sponsorship	3,000	0	3,000
<b>Sub-Total</b>	<b>\$8,500</b>	<b>\$0</b>	<b>\$8,500</b>
<b>OUTREACH 12. National/Regional Outreach - CUIBE and GBSN Membership Support</b>			
Other			
CUIBE Steering Committee	0	2,000	2,000
GBSN Membership	0	5,000	5,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$7,000</b>	<b>\$7,000</b>
<b>OUTREACH 13. National/Regional Outreach - Collaboration with International Magnet Middle/High Schools</b>			
Other			
Annual Workshop	2,000	0	2,000
Ambassador Program	0	1,000	1,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$1,000</b>	<b>\$3,000</b>
<b>RESEARCH THEME 1. Comparative Corporate Governance, Institutions and Global Strategy</b>			
Personnel (4 Faculty @ 2.5%)	0	15,450	15,450
Fringe Benefits	0	3,679	3,679
Travel			
Foreign	25,000	0	25,000
Domestic	3,000	0	3,000
Supplies	0	0	0
Other			
Databases	2,000	0	2,000
<b>Sub-Total</b>	<b>\$30,000</b>	<b>\$19,129</b>	<b>\$49,129</b>
<b>RESEARCH THEME 2. Industry Clusters, Innovation and Global Competitiveness</b>			
Personnel (4 Faculty @ 2.5%)	0	15,450	15,450
Fringe Benefits	0	3,679	3,679
Travel			
Foreign	25,000	0	25,000
Domestic	2,000	0	2,000
Supplies	1,000	0	1,000
Other			
Databases	2,000	0	2,000
<b>Sub-Total</b>	<b>\$30,000</b>	<b>\$19,129</b>	<b>\$49,129</b>

	DOE	USC	TOTAL
<b>RESEARCH THEME 3. Managing Global Political Risk and Legitimacy of MNCs - Africa Focus</b>			
Personnel (3 Faculty @ 2.5%)	0	11,588	11,588
Fringe Benefits	0	2,759	2,759
Travel			
Foreign	20,000	0	20,000
Domestic	5,000	0	5,000
Supplies	1,000	0	1,000
Other			
Databases	4,000	0	4,000
<b>Sub-Total</b>	<b>\$30,000</b>	<b>\$14,346</b>	<b>\$44,346</b>
<b>RESEARCH 13. Competitive International Business Research Program - CIBER Scholars</b>			
Personnel	0	0	0
Fringe Benefits	0	0	0
Travel			
Foreign	10,000	0	10,000
Domestic	0	0	0
Supplies	0	0	0
Other			
Databases	0	0	0
Printing and Postage	0	0	0
<b>Sub-Total</b>	<b>\$10,000</b>	<b>\$</b>	<b>\$10,000</b>
<b>PROJECT EVALUATION. Evaluation and Assessment of CIBER Programs and Activities</b>			
Personnel (1 USC Staff @ 5%)	0	3,322	3,322
Fringe Benefits	0	791	791
Supplies	1,000	500	1,500
Other			
Honoraria for Evaluators	0	0	0
Travel for Evaluators	0	0	0
Database/Surveys	0	0	0
<b>Sub-Total</b>	<b>\$1,000</b>	<b>\$4,613</b>	<b>\$5,613</b>

Center for International Business Education (CIBE)  
University of South Carolina  
October 1, 2016 - September 30, 2017

Year 3 of 4 Year Grant

	DOE	USC	TOTAL
Total Direct Costs	\$337,250	\$337,250	\$674,500
Indirect Costs @ 8%	\$26,980	\$26,980	\$53,960
<b>TOTAL</b>	<b>\$364,230</b>	<b>\$364,230</b>	<b>\$728,460</b>

**BUDGET SUMMARY: US DEPARTMENT OF EDUCATION FUNDS**

	DOE	USC	TOTAL
Personnel	4,000	238,689	242,689
Fringes	0	58,061	58,061
Travel	181,500	26,500	208,000
Equipment	0	0	0
Supplies	3,500	1,000	4,500
Contractual	0	0	0
Construction	0	0	0
Other	148,250	13,000	161,250
<b>Total Direct</b>	<b>337,250</b>	<b>337,250</b>	<b>674,500</b>
Indirect	26,980	26,980	53,960
Training Stipends	0	0	0
<b>TOTAL</b>	<b>\$364,230</b>	<b>\$364,230</b>	<b>\$728,460</b>

Center for International Business Education (CIBE)  
University of South Carolina  
October 1, 2016 - September 30, 2017

	DOE	USC	TOTAL
<b>Center Administration</b>			
Personnel			
Executive Director (25% T&E)	0	68,422	68,422
Director (75% T&E)	0	64,450	64,450
Research Director (10% T&E)	0	21,386	21,386
Outreach Director (10% T&E)	0	18,624	18,624
Fringe Benefits	0	42,392	42,392
Travel			
Foreign	4,000	0	4,000
Domestic	1,000	0	1,000
Supplies	500	500	1,000
Other			
Databases & Websites	0	0	0
<b>Subtotal</b>	<b>\$5,500</b>	<b>\$215,774</b>	<b>\$221,274</b>
<b>GRADUATE 1. Master of International Business (MIB)</b>			
Travel			
Foreign	0	2,500	2,500
<b>Sub-Total</b>	<b>\$0</b>	<b>\$2,500</b>	<b>\$2,500</b>
<b>GRADUATE 2. International MBA (IMBA) Program</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>GRADUATE 3. International MBA (IMBA) Program - Russian Track</b>			
Travel			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>GRADUATE 4. International MBA (IMBA) Program - EGADE Business School Dual Degree</b>			
Travel			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

	DOE	USC	TOTAL
<b>GRADUATE 5. International MBA (IMBA) Program - Cultural-Institutional Assessment Course Module</b>			
Other			
Curriculum Development	10,000	0	10,000
<b>Sub-Total</b>	<b>\$10,000</b>	<b>\$0</b>	<b>\$10,000</b>
<b>GRADUATE 6. International MBA (IMBA) Program - Language Track Assessment Procedures</b>			
Other			
Curriculum Development (Assessment)	2,500	0	2,500
<b>Sub-Total</b>	<b>\$2,500</b>	<b>\$0</b>	<b>\$2,500</b>
<b>GRADUATE 7. International MBA (IMBA) Program - Text Analytics Training</b>			
Other			
Training and Application	10,000	0	10,000
<b>Sub-Total</b>	<b>\$10,000</b>	<b>\$0</b>	<b>\$10,000</b>
<b>GRADUATE 8. One Year MBA Program - University of New South Wales Dual Degree</b>			
Travel			
Foreign	0	3,000	3,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$3,000</b>	<b>\$3,000</b>
<b>GRADUATE 9. Professional MBA - International Business Certificate and STSA Development</b>			
Travel			
Foreign	2,000	0	2,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$0</b>	<b>\$2,000</b>
<b>PhD 1. Doctoral Student Education - International Dual Degree PhD Programs (Cotutelle)</b>			
Travel			
Foreign	2,000	1,000	3,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$1,000</b>	<b>\$3,000</b>
<b>UNDERGRADUATE 1. Cohort Program - International Business and Chinese Enterprise (IBCE)</b>			
Travel			
Foreign	0	2,000	2,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$2,000</b>	<b>\$2,000</b>
<b>UNDERGRADUATE 2. Cohort Program Development - Critical and Foreign Languages</b>			
Travel			
Foreign			
Arabic (American University in Cairo)	3,000	2,000	5,000
Portuguese (TDB - Brazil)	3,000	2,000	5,000
French (Université Paris-Dauphine)	0	0	0
German (Universität Mannheim)	0	0	0
Spanish (Univ. de Chile - Santiago)	0	1,000	1,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$5,000</b>	<b>\$11,000</b>
<b>UNDERGRADUATE 3. Cohort Program Development - Multi-Country Thematic-Based Programs</b>			
Program 1: Moore School, New New South Wales, Australian School of Business, CUHK-Shenzhen			
Program 1: Moore School, Mannheim, ESSEC-Singapore, Fundacao Getulio Vargas-Rio de Janeiro			
Travel			
Foreign	0	3,000	3,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$3,000</b>	<b>\$3,000</b>
<b>UNDERGRADUATE 4. International Business Major - Language Assessment Procedures</b>			
Other			
Curriculum Development (Assessment)	2,000	0	2,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$0</b>	<b>\$2,000</b>
<b>UNDERGRADUATE 5. International Business Major - International Business Career Day</b>			
Other			
Curriculum Development	1,000	1,000	2,000
<b>Sub-Total</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$2,000</b>
<b>UNDERGRADUATE 6. Functional Major Programs - Functional Department Corporate Boards</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>UNDERGRADUATE 7. Functional Major Programs - Development of STSA Programs</b>			
Travel			
Foreign	2,000	2,000	4,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$2,000</b>	<b>\$4,000</b>

	DOE	USC	TOTAL
<b>BUSINESS 1. Outreach to Businesses/Government - Regional/SC Cluster &amp; Economic Development</b>			
Comparative Institutional Analysis			
Personnel (1 Faculty @ 10%)	0	18,624	18,624
Fringe Benefits	0	4,434	4,434
Travel			
Foreign	60,000	8,000	68,000
Domestic	5,000	0	5,000
<b>Sub-Total</b>	<b>\$65,000</b>	<b>\$31,058</b>	<b>\$96,058</b>
<b>BUSINESS 2. Outreach to Businesses/Government - Export-Market Entry Studies Initiative</b>			
Other			
Data Acquisition and Materials	2,000	0	2,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$0</b>	<b>\$2,000</b>
<b>BUSINESS 3. Outreach to Businesses/Government - Executive Programs (Customized &amp; Public)</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 1. National/Regional Outreach - MSI Internationalization Initiative</b>			
Travel			
Foreign			
Faculty (STSA)	7,500	0	7,500
Student (STSA)	5,000	0	5,000
Other (FDIB, Mentor Program and Paper Workshop)			
Personnel (2 Faculty Instructors)	0	0	0
Fringe Benefits	0	0	0
Travel			
Domestic	3,000	0	3,000
Conference Venue	0	0	0
<b>Sub-Total</b>	<b>\$15,500</b>	<b>\$0</b>	<b>\$15,500</b>
<b>OUTREACH 2. National/Regional Outreach - Annual International Business Research Conference</b>			
Personnel: Faculty -- International Business	0	0	0
Fringe Benefits	0	0	0
Other			
Conference Venue	10,000	1,000	11,000
Participant Travel	5,000	1,000	6,000
Materials	1,500	500	2,000
Printing and Postage	500	500	1,000
Honoraria	2,000	0	2,000
<b>Sub-Total</b>	<b>\$19,000</b>	<b>\$3,000</b>	<b>\$22,000</b>
<b>OUTREACH 3. National/Regional Outreach - Culture and Finance Conference in association with the <i>Journal of Corporate Finance</i></b>			
Personnel: Faculty -- Foreign Language	0	0	0
Fringe Benefits	0	0	0
Other			
Conference Venue	0	0	0
Participant Travel	0	0	0
Materials	0	0	0
Printing and Postage	0	0	0
Honoraria	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 4. National/Regional Outreach - Faculty Development in International Business (FDIB) - Scholarship Assistance to Business Faculty (MSI &amp; Community College Faculty)</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)	15,000	0	15,000
<b>Sub-Total</b>	<b>\$15,000</b>	<b>\$0</b>	<b>\$15,000</b>
<b>OUTREACH 5. National/Regional Outreach - Faculty Development in International Business (FDIB) New Courses Development</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 6. National/Regional Outreach - FDIB-Sub-Saharan Africa Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	6,000	0	6,000
Program Fees	13,500	0	13,500
<b>Sub-Total</b>	<b>\$19,500</b>	<b>\$0</b>	<b>\$19,500</b>

	DOE	USC	TOTAL
<b>OUTREACH 7. National/Regional Outreach - FDIB-MENA Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	6,000	0	6,000
Program Fees	9,000	0	9,000
<b>Sub-Total</b>	<b>\$15,000</b>	<b>\$0</b>	<b>\$15,000</b>
<b>OUTREACH 8. National/Regional Outreach - FDIB-China/Hong Kong Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	2,000	0	2,000
Program Fees	4,000	0	4,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$0</b>	<b>\$6,000</b>
<b>OUTREACH 9. National/Regional Outreach - Workshop on Teaching Spanish for International Business for Professors of Spanish</b>			
Personnel: Summer Faculty	4000	0	4,000
Fringe Benefits	0	0	0
Other			
Instruction: Foreign Language	8,000	0	8,000
Participant Travel	2,000	0	2,000
Materials	500	500	1,000
Printing and Postage	250	500	750
Outreach Scholarships	8,000	0	8,000
<b>Sub-Total</b>	<b>\$22,750</b>	<b>\$1,000</b>	<b>\$23,750</b>
<b>OUTREACH 10. National/Regional Outreach - USC Summer Language Institute (SLI)</b>			
Other			
Curriculum Development	6,000	0	6,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$0</b>	<b>\$6,000</b>
<b>OUTREACH 11. National/Regional Outreach - CIBE Business Language Conference Consortium</b>			
Travel			
Domestic			
MSI & CC Faculty	3,000	0	3,000
Other			
Outreach Scholarships (MSI & CC Faculty)	2,500	0	2,500
Consortium Sponsorship	3,000	0	3,000
<b>Sub-Total</b>	<b>\$8,500</b>	<b>\$0</b>	<b>\$8,500</b>
<b>OUTREACH 12. National/Regional Outreach - CUIBE and GBSN Membership Support</b>			
Other			
CUIBE Steering Committee	0	2,000	2,000
GBSN Membership	0	5,000	5,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$7,000</b>	<b>\$7,000</b>
<b>OUTREACH 13. National/Regional Outreach - Collaboration with International Magnet Middle/High Schools</b>			
Other			
Annual Workshop	2,000	0	2,000
Ambassador Program	0	1,000	1,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$1,000</b>	<b>\$3,000</b>
<b>RESEARCH THEME 1. Comparative Corporate Governance, Institutions and Global Strategy</b>			
Personnel (4 Faculty @ 2.5%)	0	15,914	15,914
Fringe Benefits	0	3,789	3,789
Travel			
Foreign	25,000	0	25,000
Domestic	3,000	0	3,000
Supplies	0	0	0
Other			
Databases	2,000	0	2,000
<b>Sub-Total</b>	<b>\$30,000</b>	<b>\$19,703</b>	<b>\$49,703</b>
<b>RESEARCH THEME 2. Industry Clusters, Innovation and Global Competitiveness</b>			
Personnel (4 Faculty @ 2.5%)	0	15,914	15,914
Fringe Benefits	0	3,789	3,789
Travel			
Foreign	25,000	0	25,000
Domestic	2,000	0	2,000
Supplies	1,000	0	1,000
Other			
Databases	2,000	0	2,000
<b>Sub-Total</b>	<b>\$30,000</b>	<b>\$19,703</b>	<b>\$49,703</b>

	DOE	USC	TOTAL
<b>RESEARCH THEME 3. Managing Global Political Risk and Legitimacy of MNCs - Africa Focus</b>			
Personnel (3 Faculty @ 2.5%)	0	11,935	11,935
Fringe Benefits	0	2,842	2,842
Travel			
Foreign	17,000	0	17,000
Domestic	2,000	0	2,000
Supplies	1,000	0	1,000
Other			
Databases	0	0	0
<b>Sub-Total</b>	<b>\$20,000</b>	<b>\$14,777</b>	<b>\$34,777</b>
<b>RESEARCH 13. Competitive International Business Research Program - CIBER Scholars</b>			
Personnel	0	0	0
Fringe Benefits	0	0	0
Travel			
Foreign	10,000	0	10,000
Domestic	0	0	0
Supplies	0	0	0
Other			
Databases	0	0	0
Printing and Postage	0	0	0
<b>Sub-Total</b>	<b>\$10,000</b>	<b>\$0</b>	<b>\$10,000</b>
<b>PROJECT EVALUATION. Evaluation and Assessment of CIBER Programs and Activities</b>			
Personnel (1 USC Staff @ 5%)	0	3,421	3,421
Fringe Benefits	0	815	815
Supplies	1,000	500	1,500
Other			
Honoraria for Evaluators	4,000	0	4,000
Travel for Evaluators	3,000	0	3,000
Databases/Surveys	0	0	0
<b>Sub-Total</b>	<b>\$8,000</b>	<b>\$4,736</b>	<b>\$12,736</b>

Center for International Business Education (CIBE)  
University of South Carolina  
October 1, 2017 - September 30, 2018

Year 4 of 4 Year Grant

	DOE	USC	TOTAL
Total Direct Costs	\$337,750	\$337,750	\$675,500
Indirect Costs @ 8%	\$27,020	\$27,020	\$54,040
<b>TOTAL</b>	<b>\$364,770</b>	<b>\$364,770</b>	<b>\$729,540</b>

**BUDGET SUMMARY: US DEPARTMENT OF EDUCATION FUNDS**

	DOE	USC	TOTAL
Personnel	4,000	245,850	249,850
Fringes	0	59,650	59,650
Travel	174,500	23,000	197,500
Equipment	0	0	0
Supplies	3,500	1,250	4,750
Contractual	0	0	0
Construction	0	0	0
Other	155,750	8,000	163,750
<b>Total Direct</b>	<b>337,750</b>	<b>337,750</b>	<b>675,500</b>
Indirect	27,020	27,020	54,040
Training Stipends	0	0	0
<b>TOTAL</b>	<b>\$364,770</b>	<b>\$364,770</b>	<b>\$729,540</b>

Center for International Business Education (CIBE)  
University of South Carolina  
October 1, 2017 - September 30, 2018

	DOE	USC	TOTAL
<b>Center Administration</b>			
<b>Personnel</b>			
Executive Director (25% T&E)	0	70,475	70,475
Director (75% T&E)	0	66,383	66,383
Research Director (10% T&E)	0	22,027	22,027
Outreach Director (10% T&E)	0	19,183	19,183
<b>Fringe Benefits</b>	0	43,511	43,511
<b>Travel</b>			
Foreign	3,500	0	3,500
Domestic	1,000	0	1,000
<b>Supplies</b>	500	750	1,250
<b>Other</b>			
Databases & Websites	0	0	0
<b>Subtotal</b>	<b>\$5,000</b>	<b>\$222,329</b>	<b>\$227,329</b>
<b>GRADUATE 1. Master of International Business (MIB)</b>			
<b>Travel</b>			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>GRADUATE 2. International MBA (IMBA) Program</b>			
<b>Other</b>			
Curriculum Development	0	0	\$0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>GRADUATE 3. International MBA (IMBA) Program - Russian Track</b>			
<b>Travel</b>			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>GRADUATE 4. International MBA (IMBA) Program - EGADE Business School Dual Degree</b>			
<b>Travel</b>			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

	DOE	USC	TOTAL
<b>GRADUATE 5. International MBA (IMBA) Program - Cultural-Institutional Assessment Course Module</b>			
Other			
Curriculum Development	2,000	0	2,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$0</b>	<b>\$2,000</b>
<b>GRADUATE 6. International MBA (IMBA) Program - Language Track Assessment Procedures</b>			
Other			
Curriculum Development (Assessment)	3,000	0	3,000
<b>Sub-Total</b>	<b>\$3,000</b>	<b>\$0</b>	<b>\$3,000</b>
<b>GRADUATE 7. International MBA (IMBA) Program - Text Analytics Training</b>			
Other			
Training and Application	10,000	0	10,000
<b>Sub-Total</b>	<b>\$10,000</b>	<b>\$0</b>	<b>\$10,000</b>
<b>GRADUATE 8. One Year MBA Program - University of New South Wales Dual Degree</b>			
Travel			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>GRADUATE 9. Professional MBA - International Business Certificate and STSA Development</b>			
Travel			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>PhD 1. Doctoral Student Education - International Dual Degree PhD Programs (Cotutelle)</b>			
Travel			
Foreign	2,000	1,000	3,000
<b>Sub-Total</b>	<b>\$2,000</b>	<b>\$1,000</b>	<b>\$3,000</b>
<b>UNDERGRADUATE 1. Cohort Program - International Business and Chinese Enterprise (IBCE)</b>			
Travel			
Foreign	0	1,000	1,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$1,000</b>	<b>\$1,000</b>
<b>UNDERGRADUATE 2. Cohort Program Development - Critical and Foreign Languages</b>			
Travel			
Foreign			
Arabic (American University in Cairo)	0	1,000	1,000
Portuguese (TDB - Brazil)	0	1,000	1,000
French (Université Paris-Dauphine)	0	1,000	1,000
German (Universität Mannheim)	0	1,000	1,000
Spanish (Univ. de Chile - Santiago)	0	1,000	1,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$5,000</b>	<b>\$5,000</b>
<b>UNDERGRADUATE 3. Cohort Program Development - Multi-Country Thematic-Based Programs</b>			
Program 1: Moore School, New New South Wales, Australian School of Business, CUHK-Shenzhen			
Program 1: Moore School, Mannheim, ESSEC-Singapore, Fundacao Getulio Vargas-Rio de Janeiro			
Travel			
Foreign	0	3,000	3,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$3,000</b>	<b>\$3,000</b>
<b>UNDERGRADUATE 4. International Business Major - Language Assessment Procedures</b>			
Other			
Curriculum Development (Assessment)	3,000	0	3,000
<b>Sub-Total</b>	<b>\$3,000</b>	<b>\$0</b>	<b>\$3,000</b>
<b>UNDERGRADUATE 5. International Business Major - International Business Career Day</b>			
Other			
Curriculum Development	1,000	1,000	2,000
<b>Sub-Total</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$2,000</b>
<b>UNDERGRADUATE 6. Functional Major Programs - Functional Department Corporate Boards</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>UNDERGRADUATE 7. Functional Major Programs - Development of STSA Programs</b>			
Travel			
Foreign	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

	DOE	USC	TOTAL
<b>BUSINESS 1. Outreach to Businesses/Government - Regional/SC Cluster &amp; Economic Development</b>			
Comparative Institutional Analysis			
Personnel (1 Faculty @ 10%)	0	19,183	19,183
Fringe Benefits	0	4,567	4,567
Travel			
Foreign	65,000	13,000	78,000
Domestic	10,000	0	10,000
<b>Sub-Total</b>	<b>\$75,000</b>	<b>\$36,750</b>	<b>\$111,750</b>
<b>BUSINESS 2. Outreach to Businesses/Government - Export-Market Entry Studies Initiative</b>			
Other			
Data Acquisition and Materials	2,000	0	2,000
<b>Sub-Total</b>	<b>2,000</b>	<b>\$0</b>	<b>\$2,000</b>
<b>BUSINESS 3. Outreach to Businesses/Government - Executive Programs (Customized &amp; Public)</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 1. National/Regional Outreach - MSI Internationalization Initiative</b>			
Travel			
Foreign			
Faculty (STSA)	0	0	0
Student (STSA)	0	0	0
Other (FDIB, Mentor Program and Paper Workshop)			
Personnel (2 Faculty Instructors)	8,000	0	8,000
Fringe Benefits	0	0	0
Travel			
Domestic	0	0	0
Conference Venue	10,000	0	10,000
<b>Sub-Total</b>	<b>\$18,000</b>	<b>\$0</b>	<b>\$18,000</b>
<b>OUTREACH 2. National/Regional Outreach - Annual International Business Research Conference</b>			
Personnel: Faculty -- International Business	0	0	0
Fringe Benefits	0	0	0
Other			
Conference Venue	10,000	0	10,000
Participant Travel	5,000	0	5,000
Materials	1,000	0	1,000
Printing and Postage	500	0	500
Honoraria	2,000	0	2,000
<b>Sub-Total</b>	<b>\$18,500</b>	<b>\$0</b>	<b>\$18,500</b>
<b>OUTREACH 3. National/Regional Outreach - Culture and Finance Conference in association with the <i>Journal of Corporate Finance</i></b>			
Personnel: Faculty -- Foreign Language	0	0	0
Fringe Benefits	0	0	0
Other			
Conference Venue	0	0	0
Participant Travel	0	0	0
Materials	0	0	0
Printing and Postage	0	0	0
Honoraria	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 4. National/Regional Outreach - Faculty Development in International Business (FDIB) - Scholarship Assistance to Business Faculty (MSI &amp; Community College Faculty)</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)	15,000	0	15,000
<b>Sub-Total</b>	<b>\$15,000</b>	<b>\$0</b>	<b>\$15,000</b>
<b>OUTREACH 5. National/Regional Outreach - Faculty Development in International Business (FDIB) New Courses Development</b>			
Other			
Curriculum Development	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>OUTREACH 6. National/Regional Outreach - FDIB-Sub-Saharan Africa Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	8,000	0	8,000
Program Fees	13,000	0	13,000
<b>Sub-Total</b>	<b>\$21,000</b>	<b>\$0</b>	<b>\$21,000</b>

	DOE	USC	TOTAL
<b>OUTREACH 7. National/Regional Outreach - FDIB-MENA Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	8,000	0	8,000
Program Fees	10,000	0	10,000
<b>Sub-Total</b>	<b>\$18,000</b>	<b>\$0</b>	<b>\$18,000</b>
<b>OUTREACH 8. National/Regional Outreach - FDIB-China/Hong Kong Program</b>			
Other			
Outreach Scholarships (MSI & CC Faculty)			
Participant Travel	2,000	0	2,000
Program Fees	4,000	0	4,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$0</b>	<b>\$6,000</b>
<b>OUTREACH 9. National/Regional Outreach - Workshop on Teaching Spanish for International Business for Professors of Spanish</b>			
Personnel: Summer Faculty	4,000	0	4,000
Fringe Benefits	0	0	0
Other			
Instruction: Foreign Language	8,000	0	8,000
Participant Travel	2,000	0	2,000
Materials	500	0	500
Printing and Postage	250	0	250
Outreach Scholarships	8,000	0	8,000
<b>Sub-Total</b>	<b>\$22,750</b>	<b>\$0</b>	<b>\$22,750</b>
<b>OUTREACH 10. National/Regional Outreach - USC Summer Language Institute (SLI)</b>			
Other			
Curriculum Development	6,000	0	6,000
<b>Sub-Total</b>	<b>\$6,000</b>	<b>\$0</b>	<b>\$6,000</b>
<b>OUTREACH 11. National/Regional Outreach - CIBE Business Language Conference Consortium</b>			
Travel			
Domestic			
MSI & CC Faculty	3,000	0	3,000
Other			
Outreach Scholarships (MSI & CC Faculty)	2,500	0	2,500
Consortium Sponsorship	3,000	0	3,000
<b>Sub-Total</b>	<b>\$8,500</b>	<b>\$0</b>	<b>\$8,500</b>
<b>OUTREACH 12. National/Regional Outreach - CUIBE and GBSN Membership Support</b>			
Other			
CUIBE Steering Committee	0	2,000	2,000
GBSN Membership	0	5,000	5,000
<b>Sub-Total</b>	<b>\$0</b>	<b>\$7,000</b>	<b>\$7,000</b>
<b>OUTREACH 13. National/Regional Outreach - Collaboration with International Magnet Middle/High Schools</b>			
Other			
Annual Workshop	0	0	0
Ambassador Program	0	0	0
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>RESEARCH THEME 1. Comparative Corporate Governance, Institutions and Global Strategy</b>			
Personnel (4 Faculty @ 2.5%)	0	16,391	16,391
Fringe Benefits	0	3,903	3,903
Travel			
Foreign	25,000	0	25,000
Domestic	3,000	0	3,000
Supplies	0	0	0
Other			
Databases	2,000	0	2,000
<b>Sub-Total</b>	<b>\$30,000</b>	<b>\$20,294</b>	<b>\$50,294</b>
<b>RESEARCH THEME 2. Industry Clusters, Innovation and Global Competitiveness</b>			
Personnel (4 Faculty @ 2.5%)	0	16,391	16,391
Fringe Benefits	0	3,903	3,903
Travel			
Foreign	25,000	0	25,000
Domestic	2,000	0	2,000
Supplies	1,000	0	1,000
Other			
Databases	2,000	0	2,000
<b>Sub-Total</b>	<b>\$30,000</b>	<b>\$20,294</b>	<b>\$50,294</b>

	DOE	USC	TOTAL
<b>RESEARCH THEME 3. Managing Global Political Risk and Legitimacy of MNCs - Africa Focus</b>			
Personnel (3 Faculty @ 2.5%)	0	12,293	12,293
Fringe Benefits	0	2,927	2,927
Travel			
Foreign	20,000	0	20,000
Domestic	5,000	0	5,000
Supplies	1,000	0	1,000
Other			
Databases	4,000	0	4,000
<b>Sub-Total</b>	<b>\$30,000</b>	<b>\$15,220</b>	<b>\$45,220</b>
<b>RESEARCH 13. Competitive International Business Research Program - CIBER Scholars</b>			
Personnel	0	0	0
Fringe Benefits	0	0	0
Travel			
Foreign	10,000	0	10,000
Domestic	0	0	0
Supplies	0	0	0
Other			
Databases	0	0	0
Printing and Postage	0	0	0
<b>Sub-Total</b>	<b>\$10,000</b>	<b>\$0</b>	<b>\$10,000</b>
<b>PROJECT EVALUATION. Evaluation and Assessment of CIBER Programs and Activities</b>			
Personnel (1 USC Staff @ 5%)	0	3,524	3,524
Fringe Benefits	0	839	839
Supplies	1,000	500	1,500
Other			
Honoraria for Evaluators	0	0	0
Travel for Evaluators	0	0	0
Database/Surveys	0	0	0
<b>Sub-Total</b>	<b>\$1,000</b>	<b>\$4,863</b>	<b>\$5,863</b>

**U.S. DEPARTMENT OF EDUCATION  
BUDGET INFORMATION  
NON-CONSTRUCTION PROGRAMS**

OMB Number: 1894-0008  
Expiration Date: 04/30/2014

Name of Institution/Organization

University of South Carolina

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

**SECTION A - BUDGET SUMMARY  
U.S. DEPARTMENT OF EDUCATION FUNDS**

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	0.00	4,000.00	4,000.00	4,000.00		12,000.00
2. Fringe Benefits	0.00	0.00	0.00	0.00		0.00
3. Travel	170,500.00	194,500.00	181,500.00	174,500.00		721,000.00
4. Equipment	0.00	0.00	0.00	0.00		0.00
5. Supplies	3,000.00	3,500.00	3,500.00	3,500.00		13,500.00
6. Contractual	0.00	0.00	0.00	0.00		0.00
7. Construction	0.00	0.00	0.00	0.00		0.00
8. Other	164,000.00	135,950.00	148,250.00	155,750.00		603,950.00
9. Total Direct Costs (lines 1-8)	337,500.00	337,950.00	337,250.00	337,750.00		1,350,450.00
10. Indirect Costs*	27,000.00	27,036.00	26,980.00	27,020.00		108,036.00
11. Training Stipends	0.00	0.00	0.00	0.00		0.00
12. Total Costs (lines 9-11)	364,500.00	364,986.00	364,230.00	364,770.00		1,458,486.00

**\*Indirect Cost Information (To Be Completed by Your Business Office):**

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government?  Yes  No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From:  To:  (mm/dd/yyyy)

Approving Federal agency:  ED  Other (please specify):

The Indirect Cost Rate is  %.

(3) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

Is included in your approved Indirect Cost Rate Agreement? or,  Complies with 34 CFR 76.564(c)(2)? The Restricted Indirect Cost Rate is  %.

Name of Institution/Organization University of South Carolina	Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.	
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**SECTION B - BUDGET SUMMARY  
NON-FEDERAL FUNDS**

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	224,989.00	231,737.00	238,689.00	245,850.00		941,265.00
2. Fringe Benefits	55,061.00	56,513.00	58,061.00	59,650.00		229,285.00
3. Travel	37,500.00	31,500.00	26,500.00	23,000.00		118,500.00
4. Equipment	0.00	0.00	0.00	0.00		0.00
5. Supplies	700.00	1,500.00	1,000.00	1,250.00		4,450.00
6. Contractual	0.00	0.00	0.00	0.00		0.00
7. Construction	0.00	0.00	0.00	0.00		0.00
8. Other	19,250.00	16,700.00	13,000.00	8,000.00		56,950.00
9. Total Direct Costs (lines 1-8)	337,500.00	337,950.00	337,250.00	337,750.00		1,350,450.00
10. Indirect Costs	27,000.00	27,036.00	26,980.00	27,020.00		108,036.00
11. Training Stipends						
12. Total Costs (lines 9-11)	364,500.00	364,986.00	364,230.00	364,770.00		1,458,486.00

**SECTION C - BUDGET NARRATIVE (see instructions)**

U.S. DEPARTMENT OF EDUCATION  
SUPPLEMENTAL INFORMATION  
FOR THE SF-424

**1. Project Director:**

Prefix: Dr.	First Name: Kendall	Middle Name:	Last Name: Roth	Suffix:
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Address:

Street1:	1014 Greene Street
Street2:	
City:	Columbia
County:	Richland
State:	SC: South Carolina
Zip Code:	29208
Country:	USA: UNITED STATES

Phone Number (give area code) 803.777.3604	Fax Number (give area code)
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Email Address:  
kroth@moore.sc.edu

**2. Novice Applicant:**

Are you a novice applicant as defined in the regulations in 34 CFR 75.225 (and included in the definitions page in the attached instructions)?

Yes  No  Not applicable to this program

**3. Human Subjects Research:**

a. Are any research activities involving human subjects planned at any time during the proposed project Period?

Yes  No

b. Are ALL the research activities proposed designated to be exempt from the regulations?

Yes Provide Exemption(s) #:

No Provide Assurance #, if available:

c. If applicable, please attach your "Exempt Research" or "Nonexempt Research" narrative to this form as indicated in the definitions page in the attached instructions.

<input type="text"/>	Add Attachment	Delete Attachment	View Attachment
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