

Fermanian Business School MGT 3061 Sourcing Management 3 Units

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Meeting days: Tuesday and Thursday	Instructor title and name: Matt Boyne
Meeting times: 11:00-12:15	Phone: 760.715-8071
Meeting location: FSB 104	E-mail: mboyne@pointloma.edu
Final Exam: Thursday 12/18/24 10:30-1:00	Office location and hours: FSB 130 MWF 9:00 – 3:00
Additional info: After Class Hours as Desired	Additional info: Zoom Office Hours as Needed

PLNU Mission

To Teach ~ To Shape ~ To Send

Point Loma Nazarene University exists to provide higher education in a vital Christian community where minds are engaged and challenged, character is modeled and formed, and service is an expression of faith. Being of Wesleyan heritage, we strive to be a learning community where grace is foundational, truth is pursued, and holiness is a way of life.

Fermanian School of Business Mission

Character – Professionalism – Excellence – Relationships – Commitment - Innovation As members of a vital Christian community, we strive to provide high quality business programs that equip students to make a positive impact in their workplace and community by connecting purpose to practice.

COURSE DESCRIPTION

This course provides an understanding of the critical role procurement and planning play in an organization's supply chain. Students will explore the role of purchasing, order management, metrics, performance, contracts, the intelligent supply chain, and ethical/sustainable sourcing. The overall impact of human capital and strategy in a supply chain will also be addressed.

COURSE LEARNING OUTCOMES

Students will

- 1. Exhibit an understanding of the essential elements of a supply chain (PLO 1, F1 & F4).
- 2. Describe the influence of purchasing on other major functional activities within an organization (PLO 1 & F1)
- 3. Examine the strategic nature of purchasing going beyond simply buying goods and services

(PLO 2 & F4).

- 4. Analyze the ethical, contractual, risk management, sustainability, and legal issues faced by purchasing and supply chain professionals (PLO 2 & F4).
- 5. Demonstrate effective business communication (PLO 3).

REQUIRED TEXTS AND RECOMMENDED STUDY RESOURCES

This course is part of our course material delivery program, LomaBooks. The bookstore will provide each student with a convenient package containing all required physical materials; all digitally delivered materials will be integrated into Canvas.

You should have received an email from the bookstore confirming the list of materials that will be provided for each of your courses and asking you to select how you would like to receive any printed components (in-store pick up or home delivery). If you have not done so already, please confirm your fulfillment preference so the bookstore can prepare your materials. For more information about LomaBooks, please go: <a href="https://example.com/heres/her

- 1.Hugos, M. H. (2018). *Essentials of supply chain management* (5th ed.). John Wiley & Sons, Inc. 2. Sarkar, S. (2017). *The supply chain revolution: innovative sourcing and logistics for a fiercely competitive world*. HarperCollins Leadership, an imprint of HarperCollins.
- 3.Schuh, C., Schnellbacher, W., Triplat, A., & Weise, D. (2022). *Profit from the source: transforming your business by putting suppliers at the core*. Harvard Business Review Press.
- 4. WSJ Student Digital Pack (Get this on your own, not via LomaBooks)

Assignments and Grading

Sample assignment distribution by percentage:	<u>mple</u> grade scale:
• 4 Exams (Week 4,8,12,16) 50% (500 Points) • Assignment-Patagonia Sourcing Case Analysis (Weeks 7 and 15) 25% (250 Points) • Two Book Reports (Weeks 6 and 14) 25% (250 Points) B=8	93-100 C=73-76 =90-92 C-=70-72 =87-89 D+=67-69 83-86 D=63-66 =80-82 D-=60-62 =77-79 F=0-59

INCOMPLETES AND LATE ASSIGNMENTS

All assignments are to be submitted/turned in by the beginning of the class session when they are due—including assignments posted in Canvas. Incompletes will only be assigned in extremely unusual circumstances.

FINAL EXAMINATION POLICY €

Successful completion of this class requires taking the final examination on its scheduled day. The final examination schedule is posted on the <u>Traditional Undergraduate Records: Final Exam</u>

<u>Schedules</u> site. If you find yourself scheduled for three (3) or more final examinations on the same day, you are authorized to contact each professor to arrange a different time for one of those

exams. However, unless you have three (3) or more exams on the same day, no requests for alternative final examinations will be granted.

ARTIFICIAL INTELLIGENCE (AI) POLICY

You are allowed to use Artificial Intelligence (AI) tools (e.g., ChatGPT, Gemini Pro 1.5, Grammarly Go, Perplexity, etc) to generate ideas, but you are not allowed to use AI tools to generate submitted content (text, video, audio, images) that will end up in any work submitted to be graded for this course. If you have any doubts about using AI, please gain permission from the instructor.

CONTENT WARNING

I acknowledge that each of you comes to PLNU with your own unique life experiences. This contributes to the way you perceive various types of information. In Sourcing, all the class content, including that which may be intellectually or emotionally challenging, has been intentionally curated to achieve the learning goals for this course. The decision to include such material is not taken lightly. These topics include child and slave labor. If you encounter a topic that is intellectually challenging for you, it can manifest in feelings of discomfort and upset. In response, I encourage you to come talk to me or your friends or family about it. Class topics are discussed for the sole purpose of expanding your intellectual engagement in the area of sourcing, and I will support you throughout your learning in this course.

TRIGGER WARNING

I acknowledge that each of you comes to PLNU with your own unique life experiences. This contributes to the way you perceive several types of information. In Sourcing we will cover a variety of topics, some of which you may find triggering. These topics include laborers that are being abused by employers. Each time this topic appears in a reading or unit, it is marked on the syllabus. The experience of being triggered versus intellectually challenged are different. The main difference is that an individual must have experienced trauma to experience being triggered, whereas an intellectual challenge has nothing to do with trauma. If you are a trauma survivor and encounter a topic in this class that is triggering for you, you may feel overwhelmed or panicked and find it difficult to concentrate. In response, I encourage you to take the necessary steps for your emotional safety. This may include leaving class while the topic is discussed or talking to a therapist at the Counseling Center. Should you choose to sit out on discussion of a certain topic, know that you are still responsible for the material; but we can discuss if there are other methods for accessing that material, and for assessing your learning on that material. Class topics are discussed for the sole purpose of expanding your intellectual engagement in the area of outsourcing, and I will support you throughout your learning in this course.

LANGUAGE AND BELONGING

Point Loma Nazarene University faculty are committed to helping create a safe and hospitable learning environment for all students. As Christian scholars we are keenly aware of the power of language and believe in treating others with dignity. As such, it is important that our language be equitable, inclusive, and prejudice free. Inclusive/Bias-free language is the standard outlined by all major academic style guides, including MLA, APA, and Chicago, and it is the expected norm in university-level work. Good writing and speaking do not use unsubstantiated or irrelevant generalizations about personal qualities such as age, disability, economic class, ethnicity, marital status, parentage, political or religious beliefs, race, gender, sex, or sexual orientation. Inclusive

language also avoids using stereotypes or terminology that demeans persons or groups based on age, disability, class, ethnicity, gender, race, language, or national origin. Respectful use of language is particularly important when referring to those outside of the religious and lifestyle commitments of those in the PLNU community. By working toward precision and clarity of language, we mark ourselves as serious and respectful scholars, and we model the Christ-like quality of hospitality. If you (or someone you know) have experienced other forms of discrimination, you can find more information on reporting and resources at www.pointloma.edu/nondiscrimination.

LOMA WRITING CENTER

The Loma Writing Center exists to help all members of the PLNU community cultivate transferable writing skills to engage their academic, professional, personal, and spiritual communities. We work toward this goal by conducting one-on-one consultation sessions, supporting writing education across the PLNU community, and participating in ongoing writing center research.

Getting feedback from the Loma Writing Center while you're in the process of working on an assignment is a great way to improve the quality of your writing and develop as a writer. You are encouraged to talk with a trained writing consultant about getting started on an assignment, organizing your ideas, finding and citing sources, revising, editing for grammar and polishing final drafts, and more. For information about how to make in-person or online appointments, see Loma Writing Center webpage or visit the Loma Writer Center on the first floor of the Ryan Library, room 221.

- Appointment Calendar: https://plnu.mywconline.com/
- Website: https://www.pointloma.edu/centers-institutes/loma-writing-center Email: writingcenter@pointloma.edu

SEXUAL MISCONDUCT AND DISCRIMINATION

In support of a safe learning environment, if you (or someone you know) have experienced any form of sexual discrimination or misconduct, including sexual assault, dating or domestic violence, or stalking, know that accommodations and resources are available through the Title IX Office at pointloma.edu/Title-IX. Please be aware that under Title IX of the Education Amendments of 1972, faculty and staff are required to disclose information about such misconduct to the Title IX Office.

If you wish to speak to a confidential employee who does not have this reporting responsibility, you can contact Counseling Services at counselingservices@pointloma.edu or find a list of campus pastors at pointloma.edu/title-ix. If you (or someone you know) have experienced other forms of discrimination or bias, you can find more information on reporting and resources at www.pointloma.edu/bias

SPIRITUAL CARE

Please be aware PLNU strives to be a place where you grow as whole persons. To this end, we provide resources for our students to encounter God and grow in their Christian faith.

If students have questions, a desire to meet with the chaplain or have prayer requests you can contact your professor or the Office of Spiritual Life and Formation.

PLNU COPYRIGHT POLICY

Point Loma Nazarene University, as a non-profit educational institution, is entitled by law to use materials protected by the US Copyright Act for classroom education. Any use of those materials outside the class may violate the law.

PLNU Recording Notification

In order to enhance the learning experience, please be advised that this course may be recorded by the professor for educational purposes, and access to these recordings will be limited to enrolled students and authorized personnel.

Note that all recordings are subject to copyright protection. Any unauthorized distribution or publication of these recordings without written approval from the University (refer to the Dean) is strictly prohibited.

PLNU ACADEMIC HONESTY POLICY

Students should demonstrate academic honesty by doing original work and by giving appropriate credit to the ideas of others. Academic dishonesty is the act of presenting information, ideas, and/or concepts as one's own when in reality they are the results of another person's creativity and effort. A faculty member who believes a situation involving academic dishonesty has been detected may assign a failing grade for that assignment or examination, or, depending on the seriousness of the offense, for the course. For all student appeals, faculty and students should follow the procedures outlined in the University Catalog. See <u>Academic Policies</u> for definitions of kinds of academic dishonesty and for further policy information.

PLNU ACADEMIC ACCOMMODATIONS POLICY

PLNU is committed to providing equal opportunity for participation in all its programs, services, and activities in accordance with the Americans with Disabilities Act (ADA). Students with disabilities may request course-related accommodations by contacting the Educational Access Center (EAC), located in the Bond Academic Center (EAC@pointloma.edu or 619-849-2533). Once a student's eligibility for an accommodation has been determined, the EAC will work with the student to create an Accommodation Plan (AP) that outlines allowed accommodations. Professors are able to view a student's approved accommodations through Accommodate.

PLNU highly recommends that students speak with their professors during the first two weeks of each semester/term about the implementation of their AP in that particular course. Accommodations are not retroactive so clarifying with the professor at the outset is one of the best ways to promote positive academic outcomes.

Students who need accommodations for a disability should contact the EAC as early as possible (i.e., ideally before the beginning of the semester) to assure appropriate accommodations can be provided. It is the student's responsibility to make the first contact with the EAC. Students cannot assume that because they had accommodations in the past, their eligibility at PLNU is automatic. All determinations at PLNU must go through the EAC process. This is to protect the privacy of students with disabilities who may not want to disclose this information and are not asking for any accommodations.

PLNU ATTENDANCE AND PARTICIPATION POLICY

Regular and punctual attendance at all class sessions is considered essential to optimum

academic achievement. If the student is absent for more than 10 percent of class sessions, the faculty

member will issue a written warning of de-enrollment. If the absences exceed 20 percent, the student may be de-enrolled without notice until the university drop date or, after that date, receive an "F" grade.

COURSE SCHEDULE AND ASSIGNMENTS

Detailed explanations follow the assignment matrix.

Week	Class	Date	Topic	Learning Objectives	Reading	Assignment
1	1	9/2/25	Introduction and Assignments	Define what a supply chain is and its main functions Understand the scope and importance of SCM in modern business Topic Overview This session introduces the definition of SCM, tracing material flow, information flow, and financial flow. It compares traditional operations with modern, interconnected supply networks.	Syllabus	
	2	9/4/25	Key Concepts	Identify core roles: suppliers, manufacturers , distributors, retailers, and service providers Explore the concept of extended and	Chapter 1 Essentials and Supply Chain Revolution	

				virtual supply chains Topic Overview Focus on horizontal vs. vertical integration, outsourcing, and the evolution from linear pipelines to dynamic networks.		
2	3	9/9/25	Plan and Source	Explain key tradeoffs in supply chain design Analyze how firms balance speed, cost, and flexibility Topic Overview Use examples to showcase decisions across production, inventory, and transportation—linke d to customer-centric strategy.	Chapter 2 Essentials and Supply Chain Revolution	
	4	9/11/25	Make and Deliver	Understand SCOR's five process categories: Plan, Source, Make, Deliver, Return Learn how SCOR enables performance benchmarking	Chapter 3 Essentials and Supply Chain Revolution	

				Topic Overview Students examine how SCOR guides process standardization and improvement across multiple industries.		
3	5	9/16/25	Technology	Introduce aggregate planning and demand forecasting Explore causal, qualitative, time series, and simulation methods Topic Overview Includes the four forecasting variables and three supply planning strategies with examples in product promotions.	Chapter 4 Essentials and Supply Chain Revolution	
	6	9/18/25	Metrics	Learn types: cycle, safety, seasonal Understand EOQ and reorder points Topic Overview Focus on inventory strategies and their relation to demand variability and cost efficiency.	Chapter 5 Essentials and Supply Chain Revolution	

4	8	9/23/25	Review Ch 1-5 WSJ articles		Chapters 1-5 Essentials and Supply Chain Revolution WSJ articles Chapters 1-5 both	Take Home exam, open notes and book (12.5%)
5	9	9/30/25	Coordination and Risk Introduction	Define strategic vs. tactical sourcing Learn vendor selection, contract management, and spend analysis Topic Overview Covers VMI versus direct materials, procurement technologies, and sustainability in sourcing.	Chapter 6 Essentials and Supply Chain Revolution	
	10	10/2/25	Innovation	Assess factors influencing facility location Compare centralized vs. decentralized networks Topic Overview Includes tax implications, labor costs, proximity to	Chapter 7 Essentials and Supply Chain Revolution	

				markets, and risk mitigation.		
6	11	10/7/25	Opportunities	Assign roles and allocate capacity across facilities Match facility function with market needs Topic Overview Discusses crossdocking, multi-echelon distribution, and facility agility.	Chapter 8 Essentials	
	12	10/9/25	Design for Competitiveness	Introduce four rules of efficient order management Learn order visibility and automation methods Topic Overview Focus on digitized workflows, exception handling, and integration with CRM and ERP systems.	Chapter 9 Essentials	1 st Book Report due 10/13/25 (12.5%)
7	13	10/14/25	Resilience and Sustainability	Objectives • Evaluate modes of transport and delivery strategies	Chapter 10 Essentials	

	14	10/16/25	Patagonia Case	Learn direct vs. milk-run approaches Topic Overview Includes cost-speed tradeoffs and matrix-based delivery optimization.	Patagonia	1 st Write Up
		10/10/20	Tatagoma sase		Case	due 10/20/25 (12.5%)
8	15	10/21/25	Capacity	Define reverse logistics and its importance Analyze return processing efficiency Topic Overview Discuss e-commerce returns, recycling, and their role in customer satisfaction and sustainability.	Handout	
	No Class	10/23/25	Break			
9	16	10/28/25	Review for Exam		Chapters 1-10 Notes	
	17	10/30/25	WSJ Articles		Assigned WSJ articles Chapters 1-10 Notes	Take Home exam open book and notes (12.5%)
10	18	11/4/25	Variability	Explain strategic alliances in supply chain operations	Handout and Chapter 1 Profit from the Source	

				Learn criteria for selecting partners and managing relationships Topic Overview Uses examples like Zara and Amazon to show how flexibility and coordination boost performance.		
	19	11/6/25	Batching	Survey ERP, MES, WMS, CRM, and APS systems Understand cloud computing, IoT, and real-time analytics Topic Overview Explores impact of integration across systems using EPCglobal, RFID, and XML/EDI exchanges.	Handout Chapter 2 Profit from the Source	
11	20	11/11/25	Flows	Explore robotic applications in storage and picking Understand benefits and limitations of automation Topic Overview Case study examples	Handout and Chapter 3 Profit from the Source	

				help illustrate future-facing supply chains and operational efficiency.	
	21	11/13/25	Buffering	Apply simulation modeling to real supply chain scenarios Understand Al's role in demand prediction and dynamic decision-makin g Topic Overview Excel Modelling Simulations including Root Beer Game	Handout and Chapter 4 Profit from the Source
12	22	11/18/25	Push/Pull	Describe the causes of demand distortion Learn how to reduce bullwhip through data sharing and planning Topic Overview Illustrates CPFR, rationing strategies, and buffering principles like Drum-Buffer-Rope.	Handout and Chapter 5 Profit from the Source

	23	11/20/25	Inventory	Learn components of CPFR Integrate demand and supply planning in S&OP Topic Overview Real-time planning cycles, forecasting, reconciliation, and execution.	Handout and Chapter 6 Profit from the Source	Take Home Exam due 11/24/25 (12.5%)
13	24	11/25/25	Risk	Identify supply chain risks: disruption, demand, compliance Learn techniques for building resilient systems Topic Overview Discusses scenario planning, dual sourcing, and inventory insurance.	Handout and Chapter 7 Profit from the Source	
	No Class	11/27/25				
14	25	12/2/25	Coordination	Objectives • Introduce principles of	Handout and Chapter 8 Profit from the Source	

				green supply chains • Learn life-cycle impacts and circular economy models Topic Overview Examples include Patagonia's sustainable practices and supplier scorecards.		
	26	12/4/25	Patagonia Case	Explore emerging trends like 3D printing and real-time visibility Define agile vs. lean supply chains Topic Overview Examines how supply chains adapt to market shifts and new tech.	Patagonia Case and Chapters 9 and 10 Profit from the Source	2 nd Book Report due 12/8/25 (12.5%)
15	27	12/9/25	Review		Essentials	Patagonia Case Study due 12/15/25 (12.5%)
16	28	12/11/25 12/18/25 10:30-1:0 0 PM	Review Final Exam		Handout	In-Class Final Exam (12.5%)

Patagonia Sourcing Assignment:

You have recently been appointed as a Global Supply Chain Manager for Patagonia, a leading apparel company renowned for its commitment to sustainability in the textile industry. Patagonia's mission statement, 'We aim to use the resources we have—our voice, our business, and our community—to address the climate crisis,' reflects its dedication to sustainable sourcing without compromise. For more information on the company's sustainability practices, visit their website at https://www.patagonia.com/.

Recently, one of your major Asian suppliers, which provides cotton fibers for cotton T-shirts, has been blacklisted due to unsustainable labor practices. As the Global Supply Chain Manager for Patagonia, you are tasked with finding a new cotton fibers supplier who adheres to sustainable practices. As part of Patagonia's commitment, the corporation has directed that US suppliers should be studied as to alternatives. Additionally, it's crucial to identify the second and third-tier suppliers of your chosen supplier to mitigate any potential future supply disruptions, and these must also be **US-based**. Therefore, mapping the supply chain for this product up to the third tier is essential. The first tier would be the facility that makes the shirt, the second tier would be the facility that spins the wool and the third tier would be the source, meaning the facility that raises the sheep. Product

Men's Cotton Shirt



https://www.patagonia.com/product/mens-capilene-cool-merino-graphic-shirt/44590.html?dwvar_44590_color=HEBK&cgid=mens-new-styles

Task

Your assignment is to prepare a report within this semester and present it to Patagonia's board of directors. Your report should include the following elements:

- A detailed three-tier supply chain map using a commercially used mapping software, such as Tableau.
- Explanation of the rationale behind choosing the shortlisted supplier(s).
- Clear mentioning of your data sources.

Please make sure that the report does not exceed 10 pages and is formatted in Times New Roman 12-point font with double spacing. The board would appreciate the inclusion of mapping visuals in the report. All information should be properly cited in the references section at the end of the report.

Designing supply chain maps is a tedious task, but it offers significant long-term benefits for the firm, particularly in managing sudden disruptions, as evidenced during the Covid-19 crisis. To support your success, your instructor will provide essential resources for the project, including:

- Lectures on supply chain mapping, offering insights into key concepts, requirements, and information gathering to aid your project work.
- The following resources are provided, and you may find many more as part of your search:

1. U.S. Merino Wool Production & Suppliers

- American Sheep Industry Association (ASI) https://www.sheepusa.org
- → Wool producers, market data, supplier directories.
- Duckworth Wool (Montana) https://www.duckworthco.com/pages/about-us
- → U.S.-sourced Merino wool from ranch to garment.
- Imperial Yarn (Oregon) https://www.imperialyarn.com /
- → Sustainable ranch-based wool sourcing.

2. U.S. Textile Processors & Mills

- National Council of Textile Organizations (NCTO) https://ncto.org
- → U.S. textile manufacturing resources and directories.
- American Made Supply Chain Database https://makersrow.com
- → Search U.S. cut-and-sew and textile vendors.
- FiberShed Regional Producer Maps https://fibershed.org
- → Lists of U.S. producers and regenerative textile processors.

3. Sustainability Certifications & Standards

- Textile Exchange Responsible Wool Standard https://textileexchange.org/standards/responsible-wool
- → Certification details for sustainable wool.
- Global Organic Textile Standard (GOTS) https://global-standard.org
- → Organic and ethical textile production standards.
- Fair Trade USA https://www.fairtradecertified.org
- → Database of certified apparel factories.

4. Logistics and U.S. Supply Chain Planning

- Bureau of Transportation Statistics (BTS) https://www.bts.gov
- → Data on domestic freight and infrastructure.
- FreightWaves https://www.freightwaves.com
- → U.S. logistics trends and freight insights.
- Supply Chain Dive https://www.supplychaindive.com
- → Industry updates and case studies.

5. Patagonia's Sustainability Practices

- Patagonia's Corporate Responsibility Hub https://www.patagonia.com/our-footprint/
- → Insights into Patagonia's sourcing policies and transparency.
- The Footprint Chronicles https://www.patagonia.com/footprint.html
- → Real-world sourcing and impact stories.

While these resources are available, the project's nature demands your proactive involvement in data collection and analysis. Every Thursday will have 45 minutes devoted to working on this problem.

10 Sourcing and Procurement Research Questions for Students to Guide You for Your Report

- 1. Where in the United States is Merino wool produced, and which farms or ranches are known for sustainable and ethical Merino sheep farming?
 - → Encourages geographic and agricultural research, and understanding fiber origin.
- 2. What sustainable certification standards (e.g., RWS Responsible Wool Standard) are applied in U.S. Merino wool production, and which suppliers meet these standards?
 - → Introduces ethical sourcing criteria and industry certifications.
- 3. Who are potential first-tier U.S. suppliers (processors or spinners) that can convert raw Merino wool into yarn suitable for apparel production?
 - → Pushes students to investigate upstream processing partners.
- 4. Which U.S.-based textile mills or knitters can transform Merino yarn into fabric while maintaining sustainable and energy-efficient practices?
 - → Engages with mid-tier manufacturing and sustainability benchmarks.
- 5. Are there any existing partnerships between Patagonia and U.S. textile or garment manufacturers that specialize in wool or natural fibers?
 - → Encourages leveraging Patagonia's existing ecosystem or strategic alliances.
- 6. What U.S. facilities (cut-and-sew) can produce high-quality Merino T-shirts with ethical labor practices, and are they GOTS or Fair Trade certified?
 - \rightarrow Guides students into researching final assembly and labor standards.
- 7. What logistics infrastructure (e.g., rail, trucking, regional distribution) is needed to connect each tier of your supply chain within the U.S.?
 - → Applies logistics planning and mapping within domestic constraints.
- 8. What is the estimated lead time from wool harvesting to final product shipping for your proposed U.S.-based supply chain?
 - → Introduces time-based supply chain analysis.
- 9. What sustainability metrics (carbon footprint, water usage, energy consumption) are associated with your supply chain design, and how do they compare to offshore sourcing? → Promotes environmental impact analysis and comparative thinking.
- 10. What risks (e.g., climate variability, labor availability, price volatility) exist in your proposed U.S. supply chain, and what mitigation strategies do you recommend?
 - → Introduces supply chain risk management thinking.