

**SUMMER Q2 2024**

<b>Meeting days:</b> Tuesday & Thursday	<b>Instructor title and name:</b> Dr. José E. Muñoz, Jr.
<b>Meeting times:</b> 9:30AM-12:15PM	<b>Phone:</b> 619-972-4082
<b>Meeting location:</b> Mission Valley – 316	<b>E-mail:</b> jmunoz@pointloma.edu (preferred)
<b>Final Exam:</b> Last Day of Class	<b>Office location and hours:</b> By appointment and before/after class
<b>Additional info:</b> Class is in person; not offered online	

**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**

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 capstone course focuses on a thorough understanding of the analytical techniques and skills necessary to identify, develop, and implement successful business strategies. Utilizing an intensive case-study approach, students demonstrate an understanding of the main elements of the strategic management process, including a semester-long detailed strategic plan analysis of an existing corporation. In addition, the course integrates knowledge and skills students have mastered in previous courses.

**COURSE LEARNING OUTCOMES**

Upon completion of this course, students will be able to:

1. Analyze and evaluate the strategies of an organization by integrating appropriate insights from the core business disciplines (PLO 1, 2 & 3).
2. Formulate a strategy for an organization considering strategic options, assessment of alternatives, and emerging market conditions (PLO 2 & 3).
3. Present the results of a strategic evaluation in a professional and concise manner (PLO 6).
4. Construct strategies and structures that reflect ethical principles, company values, and socially responsible management practices (PLO 5).
5. Collaborate effectively in a team to analyze current challenges in business (PLO 7).

## REQUIRED TEXTS AND RECOMMENDED STUDY RESOURCES

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REQUIRED: Gamble, Peteraf & Thompson. *Essentials of Strategic Management: The Quest for Competitive Advantage*, 8th edition, 2024, McGraw-Hill Education. ISBN: 978-1264124336 / 1264124333

## ASSESSMENT AND GRADING

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To successfully pass the course, students should attend all class sessions, participate in class activities, complete exams as scheduled, and turn in assignments on time. Your course grade consists of 60% individual work and 40% group work as follows out of 1000 points.

A. Prerequisite Course Leveling Module (Individual)	50
B. Chapter Presentation-Random (Individual)	100
C. Case Studies Using Casing Approach (Group)	210
D. Article Assessment - Flawed Business Strategy (Individual)	100
E. Company Strategy Analysis & Presentation (Group)	200
F. Company Strategy Analysis: Investor Assignment (Individual)	30
G. Final Casing Project (Individual)	150
H. Participation (Individual)	160

The following represents the general grading policy for this class.

93 – 100%	A	73 – 76.9%	C
90 – 92.9%	A-	70 – 72.9%	C-
87 – 89.9%	B+	67 – 69.9%	D+
83 – 86.9%	B	63 – 66.9%	D
80 – 82.9%	B-	60 – 62.9%	D-
77 – 79.9%	C+	0 – 59.9%	F

### **A. Foundations of Business Integration and Strategic Management Pre-Requisite Leveling Module (50 points) (Individual)**

You are required to take the Foundations of Business Integration and Strategic Management course pre-requisite leveling module. The time to complete the module is estimated at 6 to 9 hours, depending on your previous exposure to the subject.

An MBA program staff member has sent registration and completion instructions to your PLNU e-mail. If you have not received these instructions, please notify the professor immediately to avoid late completion penalties. To successfully complete the module, you must earn a minimum score of 80% on the module post-test. You are allowed to attempt the post-test twice. If you have not achieved a passing score (80%) after two attempts, you will be required to purchase a new module for \$39.00, and continue attempts until a passing score is achieved at the same URL:

<https://micro.peregrineacademics.com/pointloma>

The password for the retake module is: **PLNUPAY-1001**

**If you take any modules that are not assigned to you for this course, you will be billed for each module at \$39 each.**

This module is worth 5% of your total course grade. Extra credit is available if you complete the module early.

Similarly, earned credit will be reduced according to the timeline given in the table below:

Date	% Grade Earned	Incentive
6/25	7%	Early Reward
7/2	6%	Early Reward
<b>7/9</b>	<b>5%</b>	<b>Full Credit</b>
7/16	3%	Late Penalty

Note: If the course pre-requisite module has not been completed with a score of 80% or higher by **7/16**, the student will be dropped from the class. Students may receive only a partial refund in accordance with the PLNU refund policy outlined in the catalog.

The percentage earned on the leveling module post-test will be translated into points in conjunction with the extra credit and late penalty percentages as specified in the table below:

**SAMPLE TABLE**

*Based off 5% of course being equivalent to 50 points – adjust as needed based on actual points, etc. It is up to the faculty member as to how many points equates to 5% of the total course grade; however, this must represent 5% of the total grade.*

Post-test Percentage	Points Earned if completed by 6/25	Points Earned if completed by 7/2	Points Earned if completed by 7/9	Points Earned if completed by 7/16
95.00-100	70	60	50	30
90.00-94.99	63	54	45	27
85.00-89.99	56	48	40	24
80.00-84.99	49	42	35	21
<80.00	0	0	0	0

**B. Chapter Presentation-Random (100 points) (Individual)**

Reading the textbook chapters prior to class discussions is critical for your understanding of the concepts and engagement in class discussion. To assist you in being prepared to make presentations in front of groups, one student will be picked at random at the start of the class with a chapter assigned. That student will make a 15-20 minute presentation to the class that covers the highlights for the other students as the “prof for the day”. If you are called on and are not prepared to present, you will get a zero, and I will move on to another student, also randomly chosen. All students will have the chapter slide deck to read and study (along with the chapter in the text) to help prepare themselves. No new presentation is required. Student presenters will take the textbook provided slides and present the ones they consider the most significant for student learning within the 15-20 minute time frame.

**C. Case Studies Using Casing Approach (7 cases x 30) (210 points) (Group)**

There are two types of case studies used in classrooms today. The first is what I call the traditional case study method, with which you are all familiar. They are published by leading universities and academic publishers. The problem with these is that the student can conduct an internet search on any of these cases and get thousands of hits on how to solve the cases. Even the newest cases are at least 1-2 years old due to the lead times in writing and publishing the cases. Students have to pay for the case, and they usually get 2-4 weeks to read, analyze, and present their case.

The second is what is called the “Casing” method. It is faster-paced and helps students to quickly analyze and present case findings in the same class period. Students are presented with the case after they arrive in class. We will study 7 different casings, and each case is made up of 1-2 articles currently occurring in the news, and not a methodically written case for which their group has 30 minutes to study the case and prepare 4-5 specific areas of investigation to the Board of Directors in the form of a 1-page summary sheet which will be emailed to me in class before the case discussions start. The 1-pager should include individual names and recommendations, which must be specific, but which can be presented in bullet-point format. They do not need to be formal sentences written in APA format. For example, increasing market share is not acceptable. Rather, steps on how to increase market share are acceptable. As a former CEO and Board member. You will be presenting your recommendations to me. I will select a representative from each group at random to present on behalf of the group. The group grade will be a combination of your 1-pager and your presentation.

As a former Associate Dean of Graduate Programs, I used to get complaints from employers that our students could not think quickly on their feet, even though they were intelligent, analytical, and capable. They had been lulled to sleep by the 2-4 week prep time and the reliance on internet searches to help them solve the case. I worked with a group of business people to develop this approach. This methodology has become so popular nationally that many employers now use the casing approach in the final job interviewing stage for MBAs seeking work. After making it through the preliminary resume reviews and 1-2 phone/Zoom sessions, successful candidates move on to the casing round, which is usually the make-or-break moment. You are given 30 minutes or so to review a business situation and make your recommendations to a panel of employer representatives. After one semester of implementing this approach, employer complaints were dramatically reduced, and I no longer hear them. I think you will find this portion of the class to be very challenging and fun as you prepare your analytical and presentation skills.

There will also be a course-long in-class casing project involving a marketing taste testing and product ranking, and how this becomes part of corporate strategy. More details to follow.

#### **D. Article Assessment - Flawed Business Strategy (100 points) (Individual)**

You are to select one article from the Wall Street Journal, Forbes, or another major publication discussing some aspect of corporate strategy. The article must be current and must be approved by me to avoid duplication. **Articles more than 6 weeks old are off limits.** You must find an article discussing a business strategy which you believe is flawed. The article must relate some aspect of our course (e.g., competitive rivalry, alliances, ethics, etc.) to the focal company. To perform an assessment and prepare for questions you will need to conduct additional research on historical stock performance, the market and competition, international forces, etc. You will prepare a presentation summarizing the article, a well-developed analysis of the issue facing the company including why the company's current strategy is flawed & why you believe the company is pursuing the strategy, as well as your proposed solution. **I will ask for a few articles to be orally summarized and assessed during each class. Presentations should run 9 - 10 minutes, plus Q&A if time permits. At the beginning of the semester, you will be assigned a date to present your article.** You will turn in your slides (including a set of back-up slides) and a copy of the article on your scheduled dates. Remember, all presentations are in business dress. To receive full credit, you must complete all requirements of the assignment.

#### **E. Company Strategy Analysis (CSA) & Presentation (200 points) (Group)**

Each group will select a publicly traded company to study and analyze their central strategic issues throughout the course, culminating in a final project presentation in class. Firms in industries that are in transition or firms that are undergoing major strategic changes are potentially the most interesting. This section is made up of 3 parts:

a. **4-Part Analysis (100 points).** Your group will conduct a comprehensive analysis of the (1) company

history and overview, (2) external environment (environment, industry, competition) (3) market and value creation, and (4) financial analysis. Each of the 4 parts must be submitted to Canvas on the due date listed in the course schedule and is 3.5% of your course grade (14% total).

- b. Presentation (90 points).** After developing and refining the 4-part analysis, a tradeoff analysis of 2 - 3 mutually exclusive strategic alternatives (i.e., choosing one bars the company from choosing the others), a robust and viable strategic proposal for the company (supported by convincing evidence and logic), and execution plan will complete your final presentation. Your final strategy will be based on the strategic problems facing the managers, your analysis of both non-financial and financial/quantitative data (using graphs and charts), a tradeoff analysis of alternative courses of action, and your assessment of the preferred course. A significant set of backup slides are essential to your final presentation (details to be provided in class). Presentations are scheduled in one of the final class sessions. Each team will have 30 - 35 minutes to present, including Q&A. All team members must be present to earn credit and dressed in business attire. Further instructions, as well as the due date/time for each part will be posted on Canvas.
- c. Project Proposal (10 points).** Your project proposal must be turned in by the due date; however, you have a better chance of approval by turning it in sooner, as companies will be on a first-come, first-served basis. I will approve your group's selected company after receiving a suitable project proposal.

The proposal will include:

1. The names of all team members,
2. A brief description (250-500 words) of the central strategic issue you will study, covering the industry and company; and
3. Multiple data sources you have identified to facilitate qualitative and quantitative analysis, including one or more sources from the library research workshop.

#### **F. Company Strategy Analysis (CSA): Investor Assignment (30 points) (Individual)**

Each of you will be assigned to challenge a specific CSA, in the role of an investor. Prior to the presentation, you will acquire a foundational understanding of the company you will be challenging, including a review of relevant industry and company news. You will prepare a set of questions you would like the management team to address in making your investment decision. At the end of the CSA presentation, you will write up your investment decision with sound rationale (see example below). You will announce your decision to the management team. By 5pm the day after class, you will submit all questions you prepared and asked the presenting team, your evaluation of the group's performance (see Canvas for details), and an explanation of your decision to buy or sell the company's stock based on the group's comprehensive analysis and proposed strategy/execution plan.

Investors will be evaluated on the depth and relevance of your questions asked during the presentation, the insightfulness of your evaluation, and the soundness of your rationale to buy/sell the company's stock.

All students have the opportunity to ask questions during any and all presentations. Further instructions, as well as the due date/time will be posted via Canvas.

Investment Rationale Example: Decision to Sell

- i. The stock, which was as high as \$50 this year, took a big drop to as low as \$34. The decline came after the company cut its sales and profit forecast for this year, citing the risk of falling sales in Russia due to mounting tensions with the West over Ukraine. Nearly 10% of revenue is earned in Russia.
- ii. Management estimates that its sales will grow at a "mid-single-digit" rate, down from a "high-single-digit" rate.

- iii. The company operates in a highly competitive market. For the first time, it has dropped to the #3 spot in the US, behind Nike and Under Armour. Management will attempt to boost its marketing spending to regain market share, but the effect is uncertain & can easily be copied. No long-term strategy is planned.

#### **G. Final Casing Project (150 points) (Individual)**

This project will take place on the last day of class and is another casing project like the one discussed previously in part C, but there are 2 differences from part C. First, this casing project will be a totally individual effort on your part so that you can showcase what you have learned during the course. Secondly, your recommendations must be written in complete sentences, as opposed to the bullet-point format used in part C.

#### **H. Participation (160 points)**

This is a small class, which has advantages and disadvantages for you. The major advantage is that you will be able to receive much more individualized attention and guidance. The major disadvantage is that you can't hide and go silent. This is your capstone class and the chance to put all the varied pieces of instruction you have received from this program into one complete package. The success of the course will be impacted by the quality of your daily participation in and out of class. Participation will be based upon the depth and relevance of your contributions in class to discussions (including the case studies, lectures, and other assignments) and activities. It will also be based upon your contribution to your group, as evidenced by peer evaluations. Class attendance is required and any absences will lower your participation grade. See Canvas for additional requirements and criteria.

#### **GUEST SPEAKERS**

I am finalizing a list of national CEOs and other C-level types to speak to you (either in-person or via Zoom) on different aspects of strategy. I will provide more information as it becomes available.

#### **EXTRA CREDIT**

This will take the form of 7 extra credit quizzes based on current business events. This has come about because it has been my experience that newly-hired MBAs have little or no awareness of current business news and events, and yet, it is these events that may shape the business culture in which your firm operates in more ways than all the academic concepts you learned in your program. You will be formed into groups for these quizzes and no outside resources are allowed. The winning group for each quiz receives extra credit points. At the end of the course, the overall winning team will receive some Yeti SWAG to go along with the extra credit points. There is no penalty or lowering of your class grade for these quizzes. They are all upside and are meant to encourage you to be business-aware of the world around you. You will be much more valuable to your employer and to yourself in your future business career if you develop these habits early.

#### **INCOMPLETES AND LATE ASSIGNMENTS**

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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 under extremely unusual circumstances.

#### **SPIRITUAL CARE**

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PLNU strives to be a place where you grow as a whole person. To this end, we provide resources for our graduate students to encounter God and grow in their Christian faith. At the Mission Valley (MV) campus we have an onsite chaplain, Rev. Gordon Wong, who is available during class break times across the week. If you have questions for, desire to meet or share a prayer request with Rev. Wong you can contact him directly at [mvchaplain@pointloma.edu](mailto:mvchaplain@pointloma.edu) or [gordonwong@pointloma.edu](mailto:gordonwong@pointloma.edu). Rev. Wong's cell number is 808-429-1129 if you

need a more immediate response. In addition, on the MV campus there is a prayer chapel on the third floor which is open for use as a space set apart for quiet reflection and prayer.

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### **PLNU COPYRIGHT POLICY**

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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.

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### **PLNU ACADEMIC HONESTY POLICY**

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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. Faculty should follow and students may appeal using the procedure in the university Catalog. See the [Academic Honesty Policy](#) in the Graduate and Professional Studies Catalog for definitions of kinds of academic dishonesty and for further policy information.

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### **PLNU ACADEMIC ACCOMMODATIONS POLICY**

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PLNU is committed to providing equal opportunity for participation in all its programs, services, and activities. Students with disabilities may request course-related accommodations by contacting the Educational Access Center (EAC), located in the Bond Academic Center ([EAC@pointloma.edu](mailto:EAC@pointloma.edu) or 619-849-2486). Once a student's eligibility for an accommodation has been determined, the EAC will issue an academic accommodation plan ("AP") to all faculty who teach courses in which the student is enrolled each semester.

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 and/or if they do not wish to utilize some or all of the elements of their AP in that course.

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.

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### **PLNU ATTENDANCE AND PARTICIPATION POLICY**

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Regular and punctual attendance at all class sessions is considered essential to optimum academic achievement. Therefore, regular attendance and participation in each course are minimal requirements. Absences are counted from the first official meeting of the class regardless of the date of the student's enrollment. If more than twenty percent of the classes are reported as missed, the faculty member may initiate the student's de-enrollment from the course without advance notice to the student. For the 2022-2023 academic year, if absences exceed twenty (20) percent of the total number of class meetings but are due to university excused health issues, an exception will be granted. If the date of de-enrollment is past the last date to withdraw from a class, the student will be assigned a grade of "F" or "NC." There are no refunds for courses where a de-enrollment was processed. See [PLNU's policy](#) in the Graduate and Professional Studies Catalog for additional detail.

### **Asynchronous Attendance/Participation Definition**

For any asynchronous class scheduled by the faculty member, a day of attendance is determined as

contributing a substantive note, assignment, discussion, or submission by the posted due date. Failure to meet these standards will result in an absence for that day. Instructors will determine when asynchronous attendance days are required in a given week, if any.

## **USE OF TECHNOLOGY**

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In order to be successful in your course, you'll need to meet the minimum technology and system requirements; please refer to the [Technology and System Requirements](#) information. Additionally, students are required to have headphone speakers, microphone, or webcams compatible with their computer available to use for any online or hybrid classes. Please note that any course with online proctored exams require a computer with a camera (tablets are not compatible) to complete exams online.

Problems with technology do not relieve you of the responsibility of participating, turning in your assignments, or completing your class work.



## COURSE SCHEDULE AND ASSIGNMENTS

Note: See Canvas for additional details and minor schedule changes (e.g., executive speaker dates)

Week	Meeting Dates	CH	Topic	Activities and Items Due
1	July 2 – First Day of Class July 4 – No Class	-	Introduction & Course Preparation	- Read Syllabus - Extra Credit Quiz #1 - CSA: Research Public Company - Post Current Photo, Job, & Dream Job: Due 7/9
2	July 9	1	Strategy, Business Models, and Competitive Advantage	- Speaker #1 - Extra Credit Quiz #2 - Casing #1 - DUE: Group Formation
2	July 11 – In-Class Assignment	-	Strategic Management Decisions	- <b>Research Workshop: Business Librarian</b> - Casing #2 - DUE: CSA Proposal
3	July 16	2	Strategy Governance	- Casing #3 - DUE: CSA Company History & Overview
3	July 18	3	Evaluating a Company's External Environment	- Speaker #2 - Chapter 2 & 3 Quiz - Extra Credit Quiz #3 (Focus Question Case Summaries – All Groups; Case Presentation – Group 1)
4	July 23	4	Evaluating a Company's Resources, Capabilities & Competitiveness	- DUE: CSA External Environment - Casing #3
4	July 25	5	The Five Generic Competitive Strategies	- Speaker #3 - Extra Credit Quiz #4 - (Focus Question Case Summaries – All Groups; Case Presentation – Group 2)
5	July 30	6	Strengthening a Company's Competitive Position	- DUE: CSA Market & Value Creation - Casing #5
5	Aug 1	7, App A	Strategies for Competing in International Markets	- Speaker #4 - Extra Credit Quiz #5 - (Focus Question Case Summaries – All Groups; Case Presentation – Group 3)
6	Aug 6	8, App A	Corporate Strategy: Diversification and the Multi-business Company	- Casing #6 (Focus Question Case Summaries – All Groups; Case Presentation – Group 4)
6	Aug 8	9	Ethics, CSR, Sustainability and Strategy	- Speaker #5 - Extra Credit Quiz #6 - DUE: CSA Financial Analysis

7	Aug 13	-	Strategic Management	- Casing #7 - DUE: Post CSA Project Proposals on Discussion Board
7	Aug 15	10	Superior Strategy Execution	- Speaker #6- - Extra Credit Quiz #7
8	Aug 20	-	Final Presentations	- CSA Final Presentations - CSA Investor Assignment: Due 8/22
8	Aug 22	-	Course Wrap Up	- Final Casing (In-class) - DUE: Team Evaluations

I believe it is important for students to know about the qualifications of the individual who is teaching them in any course. As a professor, it is our job to add value to the information found in the text, and not just to regurgitate course materials found in the text. We will use the text as the launching point for deeper class discussions. Because of this, I have attached my 2-page bio here so that you may get to know more about me and how I believe that I can add the value you need to receive from this course, especially in a capstone format like this one.



**Professor JOSÉ E. MUÑOZ, JR., DBA, MBA, CPA**  
**BIOGRAPHICAL INFORMATION**

Email: [jmunoz@pointloma.edu](mailto:jmunoz@pointloma.edu)

LinkedIn: <https://www.linkedin.com/in/jose-munoz-462b4414/>

Mobile: 619.972.4082

My professional career is a mix of 40+ years of executive and C-level international business and consulting experience, and 18 years of full-time teaching, primarily at the MBA level. I am a Professor in my fifth full year at the **Fox School of Business at Temple University** teaching primarily at the MBA level. At Temple-Fox I have completely re-written and taught courses in Accounting, Strategy, International Business, Healthcare, and Finance, in 9 different MBA programs. I have taught in the following formats: in-person, remote (Zoom), hybrid (in-person/remote), and traditional online. I have taught courses at 4 Philadelphia locations and the Bogota, Colombia campus, and in Spain. I am working full-time for Temple-Fox, teaching my courses via remote (Zoom), and residing in San Diego, California. I am on-campus for two one-week sessions each semester.

Immediately prior to Temple-Fox, I served as the Associate Dean of Graduate Business Education for 6 years and Full Professor at **Point Loma Nazarene University** in San Diego for 13 years in International Business, Strategy, Finance, Accounting, and Healthcare Finance. At both universities, my teaching evaluations are excellent (almost always at least 4.5 on a scale of 5.0). I have been a visiting professor at universities in Mexico, Germany, and Brazil. Prior to starting my full-time teaching career, I served as an adjunct professor at universities in California, Texas, and Virginia.

I have 40 years of international executive experience in operating, financial, and administrative capacities in a variety of industries, including food processing, manufacturing, distribution, import-export, healthcare, and seafood. Since 1981, I have been President of my own consulting firm, which has been involved in general financial and business planning, re-structuring, development, and operation of several projects in the USA, Europe, Mexico, Peru, Asia, the South Pacific Islands, and the Pacific Rim. I have taken executive management roles, part-time and full-time positions, and/or equity positions in some of these projects. I am completely fluent in English and Spanish. I have

extensive experience with the following types of businesses: a) mature, larger corporations and entrepreneurial start-ups, b) domestic and international companies, c) turnarounds and re-structurings, and d) managing companies for growth. Recent consulting clients include a wide variety of industries and foreign countries, including travel and consulting in Spain, Peru, Micronesia, Marshall Islands, Guam, Cook Islands, Croatia, New Zealand, Hawaii, Taiwan, Japan, Malaysia, Canada, Hong Kong, and India. In total, I have been to 83 foreign countries, most recently Spain and Andorra, and conducted business in most of them.

My business career highlights include having served as President and CEO of **Chicken of the Sea International** (formerly: **Van Camp Seafood Company**) (1988-1992), which at the time was the second largest tuna company in the USA and today has sales in excess of US\$1 billion, producing dolphin-safe Chicken of the Sea® canned seafood products including tuna, salmon, and shellfish at its worldwide production facilities. I served as President, CEO, and Chairman of the Board of **BC Abalone** (1992-2004), a Mexican company I co-founded, which was involved in shellfish aquaculture located in Baja California, 140 miles south of San Diego.

From 1992-2004, I consulted for, and served on, the Board of a giftware company with facilities in China and the USA, which had sales of US\$100 million, in which I had a significant equity position. Before that, I served in a variety of positions in the petroleum and seafood industries, including **Exxon Corporation**, **Zapata Corporation**, **Sun Harbor Industries**, and **Solar Turbines International (a former division of International Harvester)**.

I was born in San Juan, Puerto Rico, USA, and attended **Florida State University**, where I lettered in track and received a **BS** (1968) and **MBA** (1970) in **Finance**. I became a **CPA** in Texas in 1972. I attended one year of **law school** at the **University of San Diego** (1977). I received my **Doctorate in Business Administration in Accounting (DBA)** at **Anderson University** in Indiana, USA, in August 2016. Several of my articles have been published in refereed and peer-reviewed academic journals. I serve on the editorial review boards of several Asian and European business academic journals. I sit on the scientific and advisory committees for several European and Asian annual academic and research conferences.

I served as an officer in the **U.S. Army** in 1971-1972 and received an honorable discharge with honors. I have served on several civic and corporate Boards of Directors, including the **San Diego International Sports Council** (for which I was Chairman in 1999). I currently serve on the Board of the VNA (Visiting Nurses Association) of Philadelphia.

My wife Lindy and I have been married for 52 years, have three daughters (Mary-UC-Santa Barbara, Rachel-Univ of Miami, and Sarah-Virginia Tech). I have successfully competed in the Ironman Triathlon World Championship in Hawaii, have run over 20 marathons, and now compete in long-distance bicycle races, having cycled over 20 centuries, including 7 races across Death Valley. Other hobbies include reading, travel, and attending sporting events.

(Updated March 2024)