

SOUTHEAST CUNA MANAGEMENT SCHOOL
Athens, Georgia

Guidelines for White Paper Project 2017

INTRODUCTION

The purpose of the Southeast CUNA Management School is to prepare each student for a successful career of leadership in the credit union movement. To better assist the student in this preparation, a project assignment is given as an effective means of accomplishing the objective.

The project is entitled a “White Paper” and its purpose is to present current research, analyses, and proposed solutions for an issue affecting the credit union industry or an opportunity/decision that many credit unions are currently facing or will face in the future. The papers are submitted prior to school for grading and students are required to present their papers during the school’s program. In addition, papers may be selected for posting on the School’s website in order to showcase the research being conducted by students.

The White Paper project requires students to form small teams to work together to identify their topic of choice. The teams can range from two to four students and must involve students from at least two different credit unions in order to promote greater opportunities for collaboration and problem solving across credit unions.

PROJECT TIMELINE

Successful completion of this third-year project and presentation is a prerequisite to graduate. The components of the project, as delineated below, should be e-mailed to Jennifer Green in Microsoft Word or as an Adobe Acrobat .pdf file. The paper will be reviewed and comments returned to students. Revisions may be requested to achieve a passing grade (if necessary) or to receive additional points (if desired).

June 12, 2016 – Introductory session to discuss project goals and expectations, begin discussing topics and forming teams.

June 15, 2016 – Submit names of team members, topic of research, one paragraph description of your topic for approval (Send to Jennifer Green, SRCUS Student Liaison, at jgreen@srcus.org)

Monday, August 15, 2016 – Submit an initial bibliography (does not need to be annotated) with at least ten sources and a work plan detailing how team members will share workload of research, writing, and presentation

August – November 2016 – Conduct research, surveys, data collection, CU examples, etc. to support research topic

December 2016 – Write detailed outline to structure the flow of your paper

January 16, 2017 – Submit detailed outline and annotated bibliography to Jennifer Green, SRCUS Student Liaison, at jgreen@srcus.org

January – March 2017 – Write, proof, and edit paper

March 31, 2017 – Submit final paper for grading to Jennifer Green SRCUS Student Liaison, at jgreen@srcus.org

May 1, 2017 – Receive grade and feedback from grader, begin making revision (optional)

May, 2017 – Prepare oral presentation

May 15, 2017 – Submit revised paper for possible +5 points (optional)

May 31, 2017 – Receive revised grade, if applicable

PROJECT EVALUATION

Evaluation of the Project is based on a 100-point scale, with points are allotted as follows:

- 1) Introduction/Statement of Issue: Maximum of 20 points
- 2) Research: Maximum of 40 points
- 3) Recommendations/Solutions: Maximum of 30 points
- 4) Organization/Presentation: Maximum of 10 points

To pass, the project must receive a 75/100. A High Pass is awarded to 85-93, and a Pass with Distinction is awarded to papers receiving 94 and above. Students with projects receiving a High Pass or Pass with Distinction will be invited to consider publishing their paper on the SRCUS website. Minor revisions may be requested to prepare the paper for publication.

INSTRUCTIONS FOR DEVELOPMENT

The White Paper Project consists of two parts. The first part is a written paper and the second part is preparation of an oral presentation of the White Paper that will be scheduled during the 2017 class schedule.

The White Paper should be organized into the sections outlined below and subheadings unique to each paper topic are encouraged to facilitate organization and flow of the themes in the paper.

TITLE PAGE

The cover page of the White Paper should include a title that describes the topic of the paper. In addition, each team member's name, credit union, city and state of credit union, and email information should be listed on the title page.

TABLE OF CONTENTS

The second page of the White Paper should be a Table of Contents page that identifies the major headings and subheadings of the paper with the starting page number associated with that section.

INTRODUCTION/STATEMENT OF THE ISSUE

This is the first major section of the paper and should contain a detailed description of why the topic was selected for the project and its significance to credit union professionals. The topic or issue studied should be clearly defined and evidence should be presented to support the strategic importance of the topic. The strategic importance may pertain to a specific subgroup of credit unions, a particular class of products or services, or to the industry as a whole. Evidence should contain more than the students' personal opinions. Data (e.g., industry trends, expert predictions, regulations, economic or demographic data, CUNA research, etc.) should be referenced to show support for the importance of the topic. This section of the paper may range from 2-5 pages.

RESEARCH

This section will most likely contain several subsections that are unique to the focus of each team's topic. This is a major section of the paper where students detail the scope of the issue, challenges and opportunities associated with the issue for credit unions, expert opinions or controversy over implications of the issue, and summarize available research. The objective of this section is to educate the reader with the background of the topic and provide them with resources or decision parameters to better understand the issue. The use of a case study from a team member's credit union can be an excellent illustration in this section or summary of findings from published sources. This section should clearly reflect the application of your internal and external research efforts. This section of the paper may range from 7-10 pages.

RECOMMENDATIONS/SOLUTIONS

In this part of the White Paper, students should provide their analysis of best practices, recommend solutions, and/or offer practical guidelines for decision-making with regard to the specific issue/topic. Consideration of costs, benefits, advantages, and disadvantages of alternative solutions should be included. For example, if the team's research concludes two possible strategies or courses of action, then the pros and cons of each strategy or parameters to evaluate the effectiveness of those strategies should be discussed. If the topic of the White Paper is a specific case study, the Paper should detail the specific outcomes that occurred or are expected in the future. This section of the paper may range from 5-10 pages.

SUMMARY AND CONCLUSIONS SECTION

Your written third-year project should have a 2-3 page summary where you conclude how your research and findings may help other credit union professionals think or make decisions about the issue you presented. In addition, this section should include a summary of insights gained by team members from participating in the project. For example, did the knowledge gained by the project have any implications for any of the team members' credit unions? Or did the

research persuade or change anyone's stance on an issue or solidified their approach to a challenge or opportunity?

REFERENCES SECTION

A White Paper is based on research so it is imperative that you identify all sources your team utilized to write your paper. You may have conducted interviews, collected White Papers, credit union publications, websites, journal articles, books, and newspaper articles. It is important for the readers to be able to distinguish research-based data and evidence from the team's personal opinions. By providing references, readers can access those resources to obtain more information on the topic. There are several methods for citing research. Students can utilize a footnote approach wherein the appropriate reference appears at the bottom of the applicable page or a bibliography approach where full information on the reference is offered at the end of the report. There are two recommended sources for formatting research-type papers: The American Psychological Association (APA-style) and the Modern Language Association (MLA-style). Either method is acceptable and has specific guidelines on how to reference interviews, books, websites, etc.

The following websites may be useful to you as you prepare your references:

<http://www.libs.uga.edu/ref/apastyle.html>

<http://www.libs.uga.edu/ref/mlastyle.html>

APPENDIX

Charts, figures, graphs, or photos that are not utilized in the body of the paper but are referred to in the paper and provide important supplemental information can be included in an Appendix.

GENERAL FORMATTING GUIDELINES

- The length of the paper is a function of the complexity of the topic and the extent of research information available for discussion. White Papers are intended to be succinct professional papers that help leaders make better decisions. Various industry White Papers typically range between 15-20 single-spaced pages.
- Use a 12-point font, one-inch margins, number all pages, and include a table of contents. Single-space the paper.
- Submit your White Paper in Word format or as an Adobe Acrobat file electronically to jgreen@srcus.org.
- Please be sure to proofread the paper carefully and not rely exclusively on spellcheck.

PART 2 OF THE THIRD-YEAR PROJECT: ORAL PRESENTATION

The purpose of this presentation is to present the research and recommendations so that best practices can be shared and discussed among members of your class. You should come to school with your presentation material (e.g., slides, hand-outs, visual aids) fully prepared as you will not be given

class time to put this together. We regard these presentations and discussions as an important element of student learning during the third year.

All team members are required to participate in the class presentation of the White Paper Project. Teams can decide how to best allocate the pieces of the presentation among members but should try to allocate equal amounts of time for each speaker. The presentation will be approximately **20 - 30 minutes*** as follows: 20 minutes to present material, followed by 5 minutes for Q&A and 5 minutes for wrap-up. Then teams will have 10 minutes in between each presentation to debrief and for the next team to get ready to go.

This presentation should follow the following components:

- a. **Brief Personal Introduction for each team member**
Name, title, time in position, how you got into CU work, etc.
- b. **Statement of the White Paper Topic**
Briefly tell the group why your team selected your topic and why it is an important issue for the industry.
- c. **Research**
Share the research the team conducted or details of a case study
- d. **Recommendations**
Present solutions, best practices, and/or expert opinions on the issue
- e. **Closing Statement**
Each team member share insights and lessons learned from project
- f. **Question & Answers**
Respond to questions from group

*Time adjustments may be necessary due to size of class.