



BRITISH COLUMBIA INSTITUTE OF TECHNOLOGY

SCHOOL OF MANAGEMENT

MARKETING MANAGEMENT TECHNOLOGY

DIRECTED STUDIES MANUAL AND CLASS OUTLINE

MKTG 418

4418

1993 - 1994 TERM

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(Students will be provided with **only one copy** of this manual.)

FOREWORD

Directed Studies 1993/94

Directed studies provides students with a unique opportunity to apply important practical aspects of marketing theory to real business situations. It enables students to prove to themselves and to prospective employers that they are capable of completing challenging assignments in fields in which they might choose to develop their careers.

It is important that the students complete their directed studies on topics that are most appropriate to them. To facilitate this, students are encouraged to contact industry to identify their own projects.

All projects will be subject to approval of Program Heads/Faculty Advisors.

Some projects are offered by sponsors to the Marketing department. These will be listed on the marketing notice board in the new IBM building in late December. New projects will be added as they are received. Students may follow up these opportunities as indicated on the list. Projects will be listed according to specialty (as near as possible). **Students are required to contact the Program Head or D.S. Co-ordinator before contacting the sponsor.**

Students who are not able to initiate their own project by the required deadline date, will be assigned projects by the Program Head.

Sponsors will be assessed an upfront \$200 non-refundable commitment fee to defray the direct costs of administration and course materials and unrecoverable course material costs (postage, etc.). Stationery, printing, data processing, plus any additional expenses that are incurred by students that have prior approval of the sponsor (e.g. data entry, report typing, transportation, postage, etc., are additional expenses), will also be the responsibility of the sponsor.

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MKTG 418 CLASS OUTLINE JANUARY, 1994

<u>DATE</u>	<u>MATERIAL</u>
JAN. 5, 1994 (1-1½ hrs.) (11:30 a.m.)	Re-orientation (Review deadlines, grading, etc.) Project Planning & Budgeting Project Methodology Review

NOTE:

1. STUDENT ATTENDANCE AT ORIENTATION SESSIONS IS MANDATORY.
2. ORIENTATION SESSION WILL BE HELD IN ROOM SE6-233 AT TIMES NOTED ABOVE. (Unless otherwise advised.)

DIRECTED STUDIES ORIENTATION PACKAGE

(A) Introduction

A Directed Study is a practical business application of marketing theory which is conducted by students under the direction of instructors/faculty advisors.

The intent of this orientation package is basically two- fold;

- a. It gives the student direction on the nature, depth, quality, and scheduling of a major marketing project.
- b. It allows the student to more effectively utilize their "first phase" creative thinking time to decide on a suitable and well defined problem.

(B) Purpose of Directed Studies

- To integrate the knowledge and understanding achieved in formal studies with the realities of practical business problems and situations in the community.
- To allow the student to pursue problems of their particular interest within the disciplines of their marketing technology (such as market planning, market research, merchandising, sales management, advertising, location analysis, etc.).

(C) What Constitutes a Good Project "Problem"

Each project will focus on two distinct problem areas.

- Each has to be either a real problem within an existing company or business situation in which the student has access to both primary and secondary data on which to base solution decisions ---- or ----
- It may be a new product or service idea which may form a type of problem requiring the same access to data for problem-solving decisions.

Students must have an outline with a description of the project by Monday, January 10, 1994.

The project will be finalized and approved by the faculty on Wednesday, January 12, 1994.

Note: No time extensions will be given.

(D) What Constitutes a Good "Completed" Project

- Each problem was well defined, (or a challenging sub- problem of a larger problem). Tight logic has guided the solution through the methodology of data gathering and analysis which led to conclusions that specifically answered the defined problems.
- The proposed methodology and data gathering as well as the analysis necessary was carefully thought out before beginning the project to ensure its feasibility within the time and resource limitations of the student(s). (e.g. preparatory flow chart of activities necessary - or critical path guidelines)
- The study must include two major study components of approximately equal weights. These components are (a) recommendations and (b) implementations (based on a cost-benefit assessment), and are in addition to the data gathering and reporting element of the project.
- The format of the final written report was considered beforehand on the basis of the final actual or theoretical user of the report.
 - technical or management
- Effective communication of the content of the report was considered in its final form.
 - well indexed, laid out, organized, labelled, cross-referenced, etc.

The Format Guidelines presented on page 6 will assist students in choosing and developing a suitable format.

(E) Guidelines on Use of Faculty Advisors for Guidance

- Students will be assigned one faculty advisor for each project who will assist them in whatever way he/she can to further the students' own thinking, (not the instructors).
- Each project will consist of four major stages (see page 9).

Students MUST meet with their instructor on a WEEKLY basis to discuss and review the project's progress. There is a mark allocation to be used for grading the consistency of these reviews, and will have a bearing on student projects eligible for Awards.

- (F) The attached Policy and Procedure statement is intended to verify the Educational nature of the Directed Studies projects. All persons, or organizations outside of BCIT that become involved in a project must be informed of these Policies and Procedures.
- (G) Particular note should be made of the BCIT directive on Confidentiality of Student Research Papers. The appropriate form (DS-3) is to be included following the Title Page in the final report.

(H) Marketing Research Methodology

Exploratory research is conducted initially with direction provided by both the Sponsor and Faculty Advisor. A detailed Marketing Research Design proposal is required to define the problem, objectives of the study, the research form and scope as well as a schedule and an estimated budget for the project. (See Appendix A).

The survey method will consist of both primary and secondary information.

Primary data will be collected by the formal survey design method or equivalent research technique. Secondary information will be obtained by informal investigation into periodicals, newspaper articles, government data, etc. All secondary sources are to be properly documented in the bibliography, and in footnotes, where credibility of a source will serve to emphasize a premise or finding.

Where applicable, the SPSS program (Statistical Package for the Social Sciences) or other appropriate statistical analysis package will be used in the analysis of primary data in order to compute statistics including frequencies, cross-tabulations and required regression analysis.

(I) Format and Appearance

All reports will be appropriately bound. Pages are to be typed with a 1 1/2 inch left-hand margin. Refer to Appendix B for specifications on cover format.

(J) Budget Approval by Sponsor

Students are required to have forms DS-1 and DS-2 submitted at an early stage to ensure agreement and payment of the \$200 commitment fee by sponsors (by January 31 latest).

A project budget must be submitted. This budget must be signed as approved by the sponsor when submitted.

A change in budget as a result of sampling method or size, or other extenuating circumstances, must have the written approval of the Sponsor, with copy to the Advisor.

(K) Writing and Spelling

Students are expected to have sufficient capabilities in writing skills and practical use of the English language. Language usage and accuracy of expression are important. Spelling must be accurate.

SUGGESTED FORMAT: DIRECTED STUDY REPORTS

I. TITLE PAGE

The study should feature a title encompassing the content of the report.

II. BCIT Student Confidentiality Waiver - Form DS-3

III. INTRODUCTION

A brief statement in a paragraph or two stating the circumstances leading to the project. A letter of transmittal is sometimes used in place of this.

IV. TABLE OF CONTENTS

Shows major headings only with page numbers.

A table of illustrations also is appropriate if there are a number of illustrations.

V. EXECUTIVE SUMMARY

A brief summary of your findings and recommendations should be shown before the body of the report. This facilitates the busy executive to see what you have done at a quick glance.

VI. ACKNOWLEDGEMENTS

VII. THE BODY OF THE REPORT (separate chapters)

- A. OBJECTIVES - Start out stating your objectives briefly and clearly.
- B. METHODOLOGY - Outline the methodology used in collecting the information, such as sampling method, questionnaire design, etc.
- C. LIMITATIONS - Outline the limitations of the study showing reasons where appropriate.
- D. ANALYSIS - Describe the process used to assemble the results of primary and secondary data collection.
- E. DETAILED FINDING & CONCLUSIONS - This should be distinguished from the Executive Summary mentioned earlier which goes in the front of the report. Show the findings in detail and present a thorough rationale in support of conclusions and recommendations.
- F. RECOMMENDATIONS - Your strategic action plan should specifically state the recommendations for solution to the problem, including a cost-benefit assessment of these recommendations.

VIII. APPENDICES

This section should be used to show the detailed statistics, maps, articles, or other relevant information gathered in support of the main body of the report.

The Appendix must also include a copy of your original budget, and a statement comparing it to actual expense.

All Appendices must be related and cross-referenced in the body of the report.

IX. BIBLIOGRAPHY

All references such as interviews, books, periodicals, etc. should be shown in detail, including author's name, name of publishers, date of interview or publication and so on.

Suggestions for making an appealing report

- A. Make the report dramatic
- B. Make it logical
- C. Make it easy to follow
- D. Make presentations and arguments logically
- E. Stress practical action with a cost-benefit analysis attached
- F. Use visual devices
- G. Use color
- H. Use of footnotes*
- I. Use of Third Party Format (do not use "we"/"our", etc.)

Technical Report Writing

Reports must be typed in a technical form in order that footnoting, paragraphing, indexing etc. are done logically and appealingly. See the following paperback or any similar publication on Technical Report Writing, for reference.

Kate L. Turabian

A Manual for Writers of Term Papers, Thesis and Dissertations

(Third Edition, Revised)

MARKETING MANAGEMENT TECHNOLOGY

DIRECTED STUDIES
TERM IV - 1993/94

POLICIES GOVERNING SELECTION, MONITORING, AND
GRADING OF DIRECTED STUDIES PROJECTS

I. SELECTION OF PROJECTS

- (1) In order to be approved, student project proposals must clearly demonstrate that the project will cover two areas of marketing; a full information gathering phase covering all appropriate primary and secondary sources; and an analysis/planning phase where the information gathered has led to the formulation of logical and practiced recommendations to the benefit of the project sponsor.
- (2) Three students must work together on one project.

It is the students responsibility to form their own teams (within or with other program options). Students that have not been teamed up by December 15, 1993 will be arbitrarily assigned partners to work together. Teams of more than three will not be allowed as these have proven to be unworkable.

- (3) All Directed Studies projects must meet the following qualifications:
 - a. The objectives of the study must be specific and relevant to management use.
 - b. Reliable reference sources (publication and personal contacts) must be available and accessible to the degree required, and clearly stated in footnotes and bibliography.
 - c. The scope of the study must be compatible with a three month time completion allowance, and the overall course load commitments.

II. MONITORING OF PROJECTS

- (1) Each project will be assigned a faculty advisor who will approve the project selection, provide guidance, and grade the performance.
- (2) Projects must meet the following stages of deveiopment:

DEADLINES

Stage 1 - Preplanning

Written submission of proposed project, to include specific objectives and reasons for undertaking the project. Consideration should be given to the out-of-pocket cost of undertaking the study. A signed sponsorship form must accompany the submission.

Monday,
January 12

Submission of project development plan, to include methodology to be used, reference sources, (personal contacts and data sources) and an activities schedule containing at least 3 in-progress phase completion dates. Also a detailed budget of all direct expenses must be completed.

Wednesday,
January 19

Faculty advisors will meet with students and sponsors to define terms of the project. The statement of objectives and research methodology is a critical phase that requires frequent meeting with your sponsor and advisor.

Stage 2 - Field Work

Submission of interim phase report as provided for in second stage.

Wednesday,
January 26
to
Wednesday,
March 30

Stage 3 - Written Report

Students will submit a gradable rough draft of their report prior to submission of their finished report. The specific submission date for this draft is to be agreed upon and set in conjunction with their faculty advisor.

Friday,
April 29

Submission of finished written report to meet Technical Report Standards, including an Appendix on actual and estimated expenses. Upon completion, students must submit a final actual statement of expenses and copy of the invoice.

Stage 4 - Oral Report

An oral report/presentation must be done by each student group in the presence of the Faculty Advisor, and Sponsor, provided that the Written Report meets acceptable standards of quality and accuracy. The Written Report should be submitted to the Sponsors after the Oral Presentation.

Prior -
Wednesday,
May 4

III. GRADING OF PROJECTS

- (1) Grading will be applied by the project faculty advisor on a combination of "team" and "individual" performance basis.
- (2) GRADING WILL BE ASSIGNED AND WEIGHTED TO THE PROJECT STAGES AS FOLLOWS:

		<u>WEIGHT</u>
STAGE 1	- Preplanning	20%
STAGE 2	- Field Work	20%
STAGE 3	- Written Report	40%
STAGE 4	- Oral Report	20%

MARKS ARE NOT NECESSARILY SHARED EQUALLY BY STUDENTS.

A standardized late penalty of 10% per school day will be deducted for late submissions in each of the above noted project stages.

- (3) Grading of the formal written report will be based on a variety of objective criteria. Individual faculty advisors may modify this format somewhat to meet specific project needs.
- (4) All students must earn a minimum 50% grade in each Directed Study project to receive course credit. Reports submitted that fall below this standard, will result in the student(s) being notified of the course of action necessary that may be either:
 - a. the project must be revised and corrected by June 1st to warrant a passing grade
 - or
 - b. the Directed Studies course must be repeated before the student(s) graduate.

Students need to be reminded that a superior looking Final Report and/or Oral Presentation may not compensate for inadequacy during the various stages of the term project.

The Oral Presentation to the sponsor may be denied if the results are incomplete and/or unsubstantiated. It is to students' benefit to have an oral presentation.

ELIGIBILITY

In order for a Directed Studies Project to be eligible for consideration of an award, the following criteria must be met and confirmed by memo to D.S. Coordinator by Feb. 1, 1994:

1. The Directed Studies project must meet the requirements of the Marketing Department Directed Study Course Outline.
2. It must be sponsored through a formal request from industry, received on company stationary, outlining their needs in terms of Marketing Practice, how the project is to be managed, and an objective description of the expected end product (normally something which adds value to the company's operations).

The establishment of a project of this nature must be arrived at in consultation with faculty advisors to meet academic content requirements.

3. Project sponsors must be external to BCIT.
4. Projects must be performed in the student's graduating year and completed by the end of the term prior to Convocation.
5. The project if chosen as an award finalist must be presented both orally and in written form, including executive summary and supplemented by audio visual material. Proper release forms must also be completed as per the student outlines.
6. Periodic records must be kept indicating sound project management techniques as per industry standards.

MARKETING MANAGEMENT TECHNOLOGY

DIRECTED STUDIES

POLICIES AND PROCEDURES

INTRODUCTION:

Directed Studies is an approved course in the Marketing Management Program. The purpose is to provide exposure of the students to an authentic and practical work assignment in their field. This brings students and faculty into contact with the public at large, and with marketing practitioners in particular. It is important, therefore, that all those who participate in the conduct of a Directed Studies undertaking be aware of certain conditions and limitations. These are reflected in the following statements.

POLICIES AND PROCEDURES:

1. While requests from organizations or individuals for students to undertake specific projects are welcomed, there should be no assumption that such requests will be filled on demand. The students have right of commitment to projects of their choosing up to January 10th. Thereafter, projects may be assigned.
2. Student grading of projects will be weighed according to the combined EDUCATION and PRACTICAL merits of the undertaking. Hence, the project beneficiaries must be prepared to establish meaningful and on-going progress guidance of the students as well as critical evaluation of the final results.

Studies must include recommendations and implementation components, as well as the data gathering/reporting element. The recommendation and implementation components of the study should be equally rated and include a cost assessment analysis.

3. No project will be undertaken if it can be construed as 'taking business away' from commercial agencies. In other words, the students should not be perceived as a substitute for paid professional services.
4. No remuneration of any kind should be offered to, or entitlement of the same considered on behalf of faculty and/or students involved in a project.

5. All direct expenses which arise as an essential component of a project (such as mailing, duplicating, secretarial, transportation costs, key punching and data processing, etc.) must be covered by the sponsoring firm or organization. The sponsor, being the party which has requested, or agreed to be the beneficiary of the project. An initial non-refundable Commitment Fee of \$200 is to be paid on receipt of invoice, made payable to the Marketing Department, BCIT. The standard invoice must be attached. Final invoices will be issued by April 30th. Final student grades will be withheld until all expenses have been accounted for.
6. Confirmation of Project Sponsorship (Form DS-1) and an Invoice for the \$200 non-refundable Commitment Fee (Form DS-2) must accompany the Statement of Policies and Procedures given to sponsors. Students are responsible to see that this is done.
7. Mail surveys require pickup of mail from the assigned box in Stores. The box must be cleared by April 15, and the cost of prepaid post included in the invoice to the sponsor. Be sure to include cost of invalid responses as well.
8. Duplication of questionnaires cannot be done on BCIT printers.
9. In such circumstances that students cannot use BCIT services to carry out project requirements (i.e. typing, duplicating and mailing) the sponsor must provide those services in order to fulfil the project.
10. Students must advise Sponsors that they must be prepared and permit their sponsorship of the project to be identified during the information gathering phase of the project, if required.
11. In the course of many projects, the students obtain voluntary information from numerous sources. These sources rightfully participate on the understanding they are contributing to an educational exercise. Therefore, all such participants share a common right of access to project information gathered at large. Of course, confidentiality will apply to internal information contributed by project sponsors.
12. Students cannot subcontract any portion of the data gathering phase to other companies with the exception of questionnaire data transcribed on anti-magnetic tapes or disks by data companies.
13. Students using SPSS for data analysis will be monitored for excessive use and runs. ID numbers will be assigned to students using computer facilities on campus. No portion of the SPSS program shall be sub-contracted out.
14. Edited and precoded questionnaires must include the name and telephone number of the students, and should be presented to the appropriate data entry firm in this format.

15. Two different invoices are provided for invoicing at completion of the project. Expenses due to BCIT by the sponsor are to be invoiced on Form DS-4. Students having to be reimbursed for out-of-pocket expenses should invoice the sponsor directly (Form DS-5).

DO NOT INVOICE SPONSOR TO PAY BCIT AND THEN INVOICE BCIT TO PAY STUDENT. INVOICES MUST BE ACCOMPANIED BY RECEIPTS.

16. Students are required to return data tapes/disks to the respective data companies (i.e. Elan Data, ACL Records, etc.). Failure to return this material and arrange for the payment of outstanding accounts will result in student's grades being withheld, and participation in the Directed Program Study considered "Incomplete."

The Faculty
Marketing Management Technology

APPENDIX A:
THE DESIGN OF RESEARCH INVESTIGATIONS

THE NATURE OF A DESIGN

A research "design" might be described as a series of advance decisions that, taken together, comprise a master plan or model for the conduct of the investigation. These decisions can only be made once the problem is defined and the objectives of the research are specified, and should generally precede embarking on the project. An appropriate design requires careful consideration of the problem and objectives to be met in relation to the time and resources available for the study.

The design, or plan, of a research investigation is best put in writing. It will ordinarily cover the following aspects:

1. Objective(s) of the investigation, including perhaps first a statement of general aims and then one of operational objectives in as specific a form as possible.
2. The relation of these objectives to the problem at hand.
3. The form in which results will be obtained and how they may be used. This section should include a description of the type of "Research Design" chosen for the project, illustrating reasons as to why and how it was chosen.
4. The methods to be used in attaining each of the objectives of the investigation, with perhaps an appendix or two on the more technical aspects. This section should include a detailed listing of how primary research will be gathered with comments on Sample Description/Sample Frame and Size/Data Analysis Techniques that will validate the findings.
5. A time schedule for the entire operation, including tentative deadlines for specific phases of the work.
6. An outline of secondary data sources.
7. A budget with breakdowns by type of expenditure.
8. Form and scope of final report.

This outline is a fairly general one. The organization of the research design in practice will usually vary with the type of problem.

APPENDIX B:

THE COVER FORMAT FOR DIRECTED STUDIES

TITLE

by

(Student) & (Student)

April, 1994

Sponsored by

XXXX XXXXXX LTD.

BRITISH COLUMBIA INSTITUTE OF TECHNOLOGY

CONFIRMATION OF PROJECT SPONSORSHIP

We appreciate the confidence and interest you have placed in our students by engaging in a Directed Studies joint venture. We are confident that mutual benefits will result from the experience.

When student(s) and person(s), acting on behalf of a sponsoring firm or organization agree to a Directed Studies undertaking, adherence to the attached statement of policies and procedures must be guaranteed.

It is agreed that the sponsor will make payment of the non-refundable \$200 Commitment Fee upon approval, per attached.

Your signature below confirms your agreement to carry out contact commitment, financial support of direct expense if required, and understanding of the educational purpose associated with the undertaking.

Date _____

NAME OF FIRM/ORGANIZATION: _____

ADDRESS: _____

TELEPHONE: _____

AUTHORIZED BY: _____ TITLE: _____

SIGNATURE: _____

STUDENT NAME: 1. _____ TELEPHONE: _____

ADDRESS: _____

STUDENT NAME: 2. _____ TELEPHONE: _____

ADDRESS: _____

STUDENT NAME: 3. _____ TELEPHONE: _____

ADDRESS: _____

STUDENT
SIGNATURE: _____

STUDENT
SIGNATURE: _____

STUDENT SIGNATURE: _____

FACULTY ADVISOR: _____

cc: To Sponsor

To Faculty Advisor, Marketing Management Technology

Form DS-1

STUDENT PROJECT TEAM

Marketing Management Technology,
British Columbia Institute of Technology,
3700 Willingdon Avenue,
Burnaby, B.C.
V5G 3H2

Attention: _____
Directed Studies
Faculty Advisor

I N V O I C E

Date _____

To: _____

As part of the student undertaking to conduct Directed Studies project.

NON-REFUNDABLE COMMITMENT FEE \$200.00

Please make cheques payable to Marketing Department, B.C. Institute of Technology.

Please return copy of invoice with payment to appropriate Faculty Advisor.

Attachment: Policies & Procedures Affecting Sponsors and Students.

cc: Faculty Advisor

Form DS-2

AN AGREEMENT REGARDING THE
CONFIDENTIALITY OF A SPONSORED REPORT

The report, "_____", includes information provided by one or more sponsoring organizations.

THE AUTHOR(S) AGREE(S):

1. to submit a copy of the report to the sponsor(s);
2. to submit one (or two) copies of the report at the discretion of the marking instructor. One copy of the report is for use of Authors;
3. to refrain from any further reproduction and/or distribution of all or part of the report without the written permission of the sponsor(s);
4. to otherwise keep confidential the contents of the report.

THE SPONSOR(S) AGREE(S):

1. to refrain from distributing externally any part of the report, whether original or copied;
2. to refrain from holding BCIT responsible for any breach of the confidentiality of this report;
3. to refrain from holding BCIT responsible for the contents of this report.

THE MARKING INSTRUCTOR(S) AGREE(S):

1. to refrain from reproducing all or part of this report without permission of both author(s) and sponsor(s);
2. to otherwise keep confidential the contents of the report.

(Student's Signature)

(Sponsor(s) Signature)

(Student's Signature)

(Instructor's Signature)

(Student's Signature)

Form DS-3

THIS FORM TO BE USED TO INVOICE EXPENSES
PAYABLE TO BCIT ONLY.

NOT TO BE USED FOR PERSONAL EXPENSES
INCURRED BY STUDENTS.

STUDENT PROJECT TEAM

Marketing Management Technology,
British Columbia Institute of Technology,
3700 Willingdon Avenue,
Burnaby, B.C.
V5G 3H2

Attention: Mr. L.W. Rapchuk
Directed Studies
Coordinator

I N V O I C E

Date _____

To: _____

*Please make cheques payable to Marketing Department, B.C. Institute of Technology.

*A separate invoice is required for expenses incurred by students.

*Please return copy of invoice with payment.

RE: 1993/94 DIRECTED STUDIES - MARKETING MANAGEMENT

DATE	QTY.	ITEM	AMOUNT
STATEMENT OF EXPENSES:			
		Envelopes - Size:	
		Envelopes - Size:	
		Letterhead:	
		Photostating/Printing	
		Overheads:	
		Postage (Replies):	
		BALANCE OWING TO BCIT	

cc: Faculty Advisor - Marketing Management Department

Form DS-4

THE SPONSOR (COMPANY):

The following amount is now owing and payable to the students. (Name one to whom cheque is made payable.)

(Address) _____

(Telephone) _____

AMOUNT

TOTAL	

Signature of Sponsor

(Signature of Student)

Telephone _____

(Signature of Student)

(Signature of Student)

(Faculty Advisor's Signature)