



VICTORIA UNIVERSITY OF
WELLINGTON
SCHOOL OF MARKETING AND
INTERNATIONAL BUSINESS

MARK 311
STRATEGIC
MARKETING
MANAGEMENT

COURSE OUTLINE 2005



OVERALL PHILOSOPHY

The overall philosophy for MARK 311 is that we assume that the student is familiar with the more tactical elements of marketing planning and management so that we can emphasise a more long term, strategic perspective. MARK 311 builds on the foundational material in the second stage papers and through interactive, two-way discussions in lecture, applications-oriented case material in tutorials, guest speaker presentations and the incorporation of a real business into the classroom, focusing less on the four Ps and more on an appreciation that strategy is very often company specific.

In this way, we hope to pay more attention to developing the thinking required to become real marketers, making sure that you are equipped to get a job, or move into further study – convince us that you can!!

COURSE OBJECTIVES

After completion of this course, students should be able to:

1. Better understand the changing nature of marketing and the impact of technology.
2. Distinguish between planning and strategising
3. Develop, analyse, critique and evaluate marketing strategies
4. Act like a marketer

Another aspect of MARK 311 is that students will be expected to identify gaps in their learning. In order to achieve this, areas that you think we should cover, or feel that are missing as part of your overall marketing degree will be addressed at various times throughout the course. More information as to how this will occur will be given in the first lecture.

LECTURES

The lectures for Mark 311 are on Tuesdays from 12.40 pm - 2.30 pm in Rutherford House (RH) 1. Lectures commence July 5th 2005.

COURSE TEXTS

The required course text for MARK 311 is:

MARKETING STRATEGIES: A Twenty-first Century Approach
Ashok Ranchhod
© Prentice Hall 2004

The textbook can be purchased from the University Bookshop. There may also be some second hand copies available from last year's students.

It is particularly important that you read assigned chapters **before** attending each lecture and tutorial. Advanced preparation and participation will play a vital part in your reaching the objectives for the course. Each lecture will comprise two parts the first will use a lecture format; the second will involve problem analysis. The course controller of MARK 311 will demonstrate application of marketing management concepts to assist students to complete the internally assessed component of the course.

There is also a large number of other texts and journals that you will want to familiarise yourself with during the course.

STAFF INVOLVED IN MARK 311

Sarena Saunders, Lecturer in Marketing, Room 1102, Rutherford House, Telephone 463-6933, Email Sarena.Saunders@vuw.ac.nz. Sarena will be located in Rutherford House 1102 for student questions and discussions from 2.30 – 3.30 pm on Tuesdays. In addition, students can access the course controller using the Discussion Board forum on Blackboard.

Dr. Michel Rod, Senior Lecturer in Marketing, Room 1126, Rutherford House, Telephone 463-5152, Email Michel.Rod@vuw.ac.nz. Michel will be located in Rutherford House 1126 for student questions and discussions during office hours Tuesdays 11:30 am -12:30 pm. In addition, students can access the course controllers using the Discussion Board forum on Blackboard.

METHOD OF ASSESSMENT

MARK 311 is assessed by an external examination (40%) and internal work (60%). The internal assessment is structured as follows:

Internal assessment

1.	Group Case Study Presentations	20%
2.	Individual Marketing Strategy Report	30%
3.	Tutorial Participation	10%

Examination 40%

Total 100%

TUTORIAL WORK

The preparation of tutorial material is an essential part of MARK 311. A tutorial list will be posted on the notice board in Rutherford House in Week 2 2005. This list will also be posted on Blackboard in the Announcements folder. Tutorials will commence in Week 3, the week beginning 18th July 2005. Details of tutorial preparation are attached later in the course outline.

Preparation of this material is vital to the successful completion of these Reports, as you will spend time working on a range of issues related directly to the assessment for the course.

INTERNAL ASSESSMENT

The assessment in this course is designed to test and further develop the skills that you have learned in your marketing education to this point. Emphasis is placed on your ability to demonstrate that you understand a wide range of marketing theory (including areas not necessarily taught in class) and can apply it in a number of 'real world' situations in the form of 3 case studies.

In this course you will be required to undertake two pieces of assessment, the Group Case Study Presentation and Marketing Strategy Report – details of which are contained later in this outline.

There is also a tutorial participation component that will contribute towards your final grade in the course.

THE EXAMINATION

The examination will account for 40% of the student's overall mark. Students will be notified about the format of the exam during the last lecture. The internal assessment will provide essential learning material for the examination.

ASSIGNMENTS

STRATEGY PRESENTATIONS – LIVE CASE

The assessment in this course centres around three case studies. The first piece of assessment is a group presentation. The presentation should cover background and the current situation of the company that you are studying, as well as a BRIEF indication of what potential marketing strategies may be developed in the future (addressed in detail in the Marketing Strategy Report).

Issues should include (but is not limited to):

Market Analysis, Segmentation, Target markets, Stakeholders, Competitors, Financial Situation, External Environment, Competitors, Other issues relevant to your company.

There is no set layout for the presentations – you are free to structure them however you like. However, you must in the course of the presentation provide a sufficient overview of the 3 key areas of company background, current situation and potential marketing strategies.

Presentations are 15 minutes, with a maximum of 10 minutes for the main presentation and 5 minutes for questions. ALL group members must participate in the presentation. They will take place in **Week 7 – beginning 29th August 2005** in tutorials.

THE MARKETING STRATEGY REPORT – LIVE CASE

The second piece of assessment is a marketing strategy report, which is INDIVIDUAL. In this report, you are to summarise the key information from the presentations and go on to develop in DETAIL a marketing strategy programme for your company.

The nature of this report can take any forms you like, so long as it provides a clear marketing strategy for your company over the next 3-5 years. In class, you will be introduced to a number of frameworks (Ranchod, Aaker, Kotler, Kerin and Peterson, Reed, Wilson and Gilligan), which you may choose to draw upon in writing the report.

The report must be between 3000 and 5000 words in length. The due date for this report is **Tuesday 27th September 2005 at 4pm** in the Mark 311 hand in box located on the mezzanine floor of Rutherford House.

IMPORTANT ASSIGNMENT INFORMATION

1. Late Penalty: In fairness to other students, work submitted after the deadline will incur a penalty for lateness. Late assignments will carry a penalty of 5% for each day late. In the event of unusual circumstance e.g. serious illness, family bereavement, students should discuss waiver of the penalty with the course lecturer.
2. Word Count: Clear word count limits are stated for these assignments. Failure to adhere to these limits will incur a penalty of 2.5% for each 500 words over the limit.
3. Referencing: Proper and accurate referencing is required in these assignments. Students are encouraged to use the lectures or tutorials for example, or by the lecturer/tutor concerned at a pre-arranged time and place. 'SMIB Guidelines for Written Material and Referencing' for information as to how to present, submit, organize and reference their work. These guidelines, including examples of appropriate essay, report, and academic research formats are contained in this course outline.
4. Returning Assignments: Where possible assignments will be returned to students in class (during lectures or tutorials for example), or by the lecturer/tutor concerned at a pre-arranged time and place. In accordance with University policy, all uncollected assignments will be held by the SMIB office (RH 1121) for three months following the end of term, and then disposed of.

ACCESSING WEB RESOURCES

You will be able to access the course outline, course notes, case studies and other learning material (e.g., short problems, exam questions) via Blackboard. The address is: <http://blackboard.vuw.ac.nz>. You will be asked for your SCS username and student ID. Click on the MARK 311 course heading under My Courses.

It is up to you to make sure that you check Blackboard on a regular basis. The lecturer or tutors cannot be held responsible if you do not check the notices or the various Discussion Boards frequently.

TERMS REQUIREMENTS

To obtain terms in MARK 311, students must:

1. Attend 8 out of the 10 scheduled tutorials.
2. Participate in the Case Study presentation and submit the Marketing Strategy Report on the due date as outlined above.

Failure to meet terms requirements will mean that you will receive an ungraded "Fail" (Q) for the course, whether or not you choose to sit the final examination.

OVERALL PASS MARK

The overall pass mark for this course will be 50% of the total marks i.e. 50/100.

The University also requires that you achieve a minimum grade of 40% in the Registry exam.

GENERAL UNIVERSITY POLICIES AND STATUTES

Students should familiarise themselves with the University's policies and statutes, particularly those regarding assessment, course of study requirements, and formal academic grievance procedures.

STUDENT CONDUCT AND STAFF CONDUCT

The Statute on Student Conduct together with the Policy on Staff Conduct ensure that members of the University community are able to work, learn, study and participate in the academic and social aspects of the University's life in an atmosphere of safety and respect. The Statute on Student Conduct contains information on what conduct is prohibited and what steps can be taken if there is a complaint. For queries about complaint procedures under the Statute on Student Conduct, contact the Facilitator and Disputes Advisor. This Statute is available in the Faculty Student Administration Office or on the website at: www.vuw.ac.nz/policy/StudentConduct. The policy on Staff Conduct can be found on the VUW website at: www.vuw.ac.nz/policy/StaffConduct.

ACADEMIC GRIEVANCES

If you have any academic problems with your course you should talk to the tutor or lecturer concerned or, if you are not satisfied with the result of that meeting, see the Head of School or the Associate Dean (Students) of your Faculty. Class representatives are available to assist you with this process. If, after trying the above channels, you are still unsatisfied, formal grievance procedures can be invoked. These are set out in the Academic Grievances Policy which is published on the VUW website: www.vuw.ac.nz/policy/AcademicGrievances.

PLAGIARISM AND ACADEMIC INTEGRITY

Academic integrity is about honesty – put simply it means **no cheating**. All members of the University community are responsible for upholding academic integrity, which means staff and students are expected to behave honestly, fairly and with respect for others at all times.

Plagiarism is a form of cheating which undermines academic integrity. Plagiarism is **prohibited** at Victoria.

The University defines plagiarism as follows:

Plagiarism is presenting someone else's work as if it were your own, whether you mean to or not.

'Someone else's work' means anything that is not your own idea, even if it is presented in your own style. It includes material from books, journals or any other printed source, the work of other students or staff, information from the Internet, software programmes and other electronic material, designs and ideas. It also includes the organization or structuring of any such material.

Plagiarism is not worth the risk.

Any enrolled student found guilty of plagiarism will be subject to disciplinary procedures under the Statute on Student Conduct (www.vuw.ac.nz/policy/studentconduct) and may be penalized severely. Consequences of being found guilty of plagiarism can include:

- an oral or written warning
- suspension from class or university
- cancellation of your mark for an assessment or a fail grade for the course.

Find out more about plagiarism and how to avoid it, on the University's website at: www.vuw.ac.nz/home/studying/plagiarism.html.

STUDENTS WITH DISABILITIES

The University has a policy of reasonable accommodation of the needs of students with disabilities. The policy aims to give students with disabilities an equal opportunity with all other students to demonstrate their abilities. If you have a disability, impairment or chronic medical condition (temporary, permanent or recurring) that may impact on your ability to participate, learn and/or achieve in lectures and tutorials or in meeting the course requirements, then please contact the Course Coordinator as early in the course as possible. Alternatively you may wish to approach a Student Adviser from Disability Support Services to confidentially discuss your individual needs and the options and support that are available. Disability Support Services are located on Level 1, Robert Stout Building, or phoning 463-6070, email: disability@vuw.ac.nz. The name of your School's Disability Liaison Person can be obtained from the Administrative Assistant or the School Prospectus.

Student Support

Staff at Victoria want students' learning experiences at the University to be positive. If your academic progress is causing you concern, please contact the relevant Course Co-

ordinator, or Associate Dean who will either help you directly or put you in contact with someone who can.

The Student Services Group is also available to provide a variety of support and services. Find out more at www.vuw.ac.nz/st_services/ or email student-services@vuw.ac.nz.

VUWSA employs two Education Coordinators who deal with academic problems and provide support, advice and advocacy services, as well as organising class representatives and faculty delegates. The Education Office is located on the ground floor, Student Union Building, phone 463 6983 or 463 6984, email education@vuwsa.org.nz.

FACULTY OF COMMERCE AND ADMINISTRATION OFFICES

Railway West Wing (RWW) - FCA Student Administration Office

The Student Administration Office is located on the ground and first floors of the Railway West Wing. The ground floor counter is the first point of contact for general enquiries and FCA forms. Student Administration Advisers are available to discuss course status and give further advice about FCA qualifications.

Easterfield (EA) - FCA/Law Kelburn Office

The Kelburn Campus Office for the Faculties of Commerce & Administration and Law is situated in the Easterfield Building - it includes the ground floor reception desk (EA005) and offices 125a to 131 (Level 1). The office, will be open from 9:00 am to 5:00 pm during Trimester 2, offers the following:

- Duty tutors for student contact and advice.
- Information concerning administrative and academic matters.
- FCA Student Administration forms (e.g. application for academic transcripts, requests for degree audit, COP requests).
- Examinations-related information during the examination period.

Please note:

There will be a Student Administration Adviser, from the RWW office, based in EA005 from Monday 27 June to Friday 1 July (9:00 am to 5:00 pm) and from Monday 4 July to Friday 22 July (11:00 am to 1:00 pm).

TIMETABLE

<u>Week</u>	<u>Date</u>	<u>Topic</u>	<u>Reading</u>
Week 1	5 July	Introduction and Course Outline	None
Week 2	12 July	Marketing Strategy & Concepts	Chap 1
Week 3	19 July	Market Analysis & Segmentation	Chap 2
Week 4	26 July	Case Study for Assessment Presentation and Assignment Frameworks	
Week 5	2 August	Stakeholders & Marketing	Chap 3
Week 6	9 August	Sustainability & Strategy	Chap 4
MID-TRIMESTER BREAK			
Week 7	30 August	Marketing Strategies a Reminder Building Brand Relationships	Chap 5
Week 8	6 September	Implementing Strategies	Chap 6
Week 9	13 September	Organizing for Marketing	Chap 7
Week 10	20 September	Learning & Organization	Chap 8
Week 11	27 September	Measuring Marketing Performance Guest Speaker	Chap 9
Week 12	4 October	New Perspectives in Developing Marketing Strategies	Chap 10

TUTORIAL PREPARATION MATERIAL

Tutorial 1

Week 3: Week Beginning 19th July 2005

Topic: Introductory Tutorial

Preparation Required: This week, the groups for the report and case study will be determined. A case study topic will be allocated to each group in line with the upcoming lectures, which will form the basis for the presentations and marketing strategy report.

Tutorial 2

Week 4: Week Beginning 25th July 2005

Topic: Case Study – Krill: Marketing Strategy Issues For A New Rock Band

Preparation Required: Read the case and be prepared to answer the questions in tutorials. A copy of this case study can be found at the end of the course outline.

Tutorial 3

Week 5: Week Beginning 1st August 2005

Topic: Presentation

Preparation Required: Given the presentations in the lecture in Week 4 this will be an opportunity to work in your groups on the presentations in Week 7.

Tutorial 4

Week 6: Week Beginning 8th August 2005

Topic: Case Study – Heavenly Health and Aged Care Group

Preparation Required: Read the case and be prepared to answer the questions in tutorials. A copy of this case study can be found at the end of the course outline

Tutorial 5

Week 7: Week Beginning 29th August 2005

Topic: Case Study Presentations

This week is the group case study presentations.

Tutorial 6

Week 8: Week Beginning 5th September 2005

Topic: Case Study – Whey to Go: A Market Leader Fights Back

Preparation Required: Read the case and be prepared to answer the questions in tutorials. A copy of this case study can be found at the end of the course outline

Tutorial 7

Week 9: Week Beginning 12th September 2005

Topic: Case Study – 42 Below Vodka: The Quality Option

Preparation Required: Read the case and be prepared to answer the questions in tutorials. A copy of this case study can be found at the end of the course outline.

Tutorial 8

Week 10: Week Beginning 19th September 2005

Topic: Strategy Report Work

Preparation Required: This session will allow you the opportunity to work on issues related to your Strategy Report utilising your tutor and fellow classmates.

Tutorial 9

Week 11: Week Beginning 19th September 2005

Topic: Case Study – TimeZoneOne Takes Advantage of Time

Preparation Required: Read the case and be prepared to answer the questions in tutorials. A copy of this case study can be found at the end of the course outline.

Tutorial 10

Week 12: Week Beginning 3rd October 2005 - **TBA**

PART A: SCHOOL OF MARKETING AND INTERNATIONAL BUSINESS GUIDELINES FOR WRITTEN MATERIAL

Page Layout

All written material submitted in SMIB courses must be typed using 12 pt. Font. Either Times Roman or Arial font may be used. Whichever is used, it must be used consistently throughout the document, including tables and figures. Two point five centimetre (one inch) margins should be used at the top, bottom, and both sides of the document. Use double spacing, or 1.5 spacing, between lines. Add an additional line space between paragraphs, OR indent the first line of each paragraph.

Referencing Style

All SMIB written documents must use the APA referencing style. The reference style is provided in at the end of this document.

- References should be placed **at the end** of the document in a separate section (*not as footnotes or endnotes*).
- **Every** source that is cited in the text **must** have the complete reference in the reference section. Conversely, every source appearing in the reference section **must** appear -- at least once -- in the text. Author's names must be spelled the same in the text and reference section. The dates given must be the same in the text and reference section.

Appendices

You may use appendices to place supplementary material, which does not directly relate to the text of your essay/report. If something is important then it should be included in your discussion proper. Reference must be made to the appropriate appendices in your text (i.e., refer Appendix A). A single appendix should be titled APPENDIX. Multiple appendices are titled APPENDIX A, APPENDIX B, etc. Appendices appear in the order that they are mentioned in the text of the essay/report, for example, the first appendix to be referred to will be Appendix A.

Tables and Figures

Tables and Figures should be inserted in the text of the document.

- A table is something that contains an array of numbers or text (such as a SWOT table). Use the MSWord table option to create a table, or create the table in Excel and insert it in the document. Other possibilities are to cut and paste tables from the output of other programs. For example, SPSS output is in the form of tables that may be cut and pasted into a document. Check for spelling in material you insert from other sources!
- A figure is something that contains graphical content. Typical content for a figure consists of graphs created in Excel, organisational diagrams created in Power Point, or graphs created by programs such as SPSS. Charts and graphs created by these

programs may be cut and pasted into a document. Word cannot check spelling in graphical material.

- Each table or figure should be inserted below **two, centred lines of text**. The first line of text should identify the table or figure (Table 1 or Figure 3, for example). Below this line there should be a line describing what is in the table or figure (e.g., “GDP of New Zealand, 1988 – 2002,” or “Market Shares of Firms (2003).” The identification and explanation lines should separately be entered as text preceding the table or figure. The table or graph is inserted and centred below. (Including the two lines in a figure reduces the relative size of the figure and, furthermore, sizing the figure to fit the page will change the font size of the identification and title lines).
- If a table or figure is included in a document, then there **must** be text that refers to it! The text should refer to it by name (“As Table 1 shows...”). The text should also explain what the table or figure shows. Do **not** leave it to the reader to try to figure out why you included the table or figure in your document!
- Tables and figures should supplement and clarify the text, not completely duplicate it. Avoid repetitive figures (e.g., pie charts, histograms), which could be summarized more succinctly by one or two tables, or simply covered in the text.
- Sufficient information should be contained in the table or figure so that the reader can understand it without having to consult the text. Footnotes immediately underneath the table or figure should be used to explain all abbreviations and symbols used. Do not forget to give the source of your material with your table/figure.

Use of covers

It is **not** necessary to put plastic (or other types of covers) on assignments turned in *during* the semester. A simple cover sheet with a staple in the upper, left corner of the document will suffice. Your instructor will tell you whether major assignments turned in *at the end* of the semester should have covers (and if so the nature of the cover).

Organisation and Writing Style

A good way to start a written document is to make an outline of its structure, for example, using Word outline. That gives you a check on logical flow. You should be able to tell from the outline whether the paragraphs are in the proper order and whether one leads to the next in a logical fashion.

- Generally, the first sentence of the paragraph should cover the main point or purpose of the paragraph. If the paragraph has more than one purpose, try to break it into two or more paragraphs.
- Next in order are material, arguments, or evidence that support the main point.
- *Examples* that illustrate supporting material, arguments, or evidence are placed at the end of the paragraph.
- Regarding the structure of sentences, the noun and verb should occur as closely together as possible. (*The PLC is important. Not: The PLC, which has been around a long time, and has seen wide use, in many contexts, continents, industries, product categories, and so forth, is important*).

- Place the material you want to emphasize at the stress position in the sentence. The stress position is at the end of a sentence. You want to emphasize **new material** typically. For example, assuming you have introduced the PLC, and the point you want to make is that it is important, you would have as a first sentence of a paragraph (*The PLC is important. Not: An important concept is the PLC*).
- In the above illustration, when you start the paragraph with the sentence “*The PLC is important*” you have accomplished two things. First, you have made the point that the purpose of the paragraph is to argue that the PLC is important. Second, the notion that it is important *is no longer new information*. Subsequent sentences should provide new information that supports that point.
- The next sentence, for example, might be: (*It is important because it explains why firms must develop new products; Or: It is important for three reasons. The first reason is: Or, It is important for many reasons. One important reason is*). Note that the stressed part of the previous sentence is no longer new and has been moved to the front of the current sentence. The new information in the current sentence is a reason for why the PLC is important. The reason is placed in the stress position.
- The same pattern applies to the following sentence. (*The PLC is important. It is important because it explains why firms must develop new products. New products must be developed because competitors enter the firm’s markets, offerings become more homogeneous, prices decrease, and margins are reduced.*
- Avoid terms or usages that are or may be interpreted as denigrating to ethnic or other groups. Be particularly careful to use gender-neutral terms. For example, use plural pronouns (e.g., clients...they) rather than gender-specific pronouns (e.g., client...he).
- Using the first person is discouraged in academic writing. For example it is better to say “In the author’s opinion.....” rather than “In my opinion.....”, or “the author believes....” rather than “I believe...”. Alternatively, reword your sentence to avoid using these terms.

Footnotes

Footnotes should be used sparingly. Points that are important can usually be integrated into the text. Avoid footnotes or endnotes for referencing (see Referencing below).

Two final points:

- Proofread your document before turning in for marking. It **always** is best to let a few days pass between your last writing and your proofreading of a document.
- Use the spelling/grammar checker on your document before turning it in for making.

PART B: SMIB REFERENCING STYLE GUIDELINES FOR REFERENCING FOR ALL ASSIGNMENTS

Purpose

The effective use of a referencing system enables you to acknowledge the source of your ideas, to provide support for your arguments, to avoid plagiarism, and to allow your readers to consult original readings.

It is strongly recommended that you use the American Psychological Association (APA) style of referencing, a widely-used and well-documented style in the social sciences and management.

This brief introduction to referencing covers the basics of in-text referencing, reference lists and bibliographies.

American Psychological Association (APA) Style

The American Psychological Association (APA) style of referencing is widely used in the social sciences (including commerce). The manual for this style is held in the University Library (Publication manual of the American Psychological Association), or for the latest tips on citing electronic sources see the APA web page at <http://www.apastyle.org/electref.html>.

In-text referencing system

When using the APA format, follow the author-date method of in-text citation. This means that the author's last name and the year of publication for the source should appear in the text, and a complete reference should appear in the reference list at the end of the paper.

This system replaces the use of endnotes or footnotes for references. You use brackets () in the text to supply the surname of the author(s), the year of publication, and, if a direct quote is used, give the page number. For example:

Correct referencing allows the reader to follow up interesting references (Jones, 1992).

Correct referencing gives what Jones has called 'an impression of competence' to a piece of academic writing (Jones, 1992, p. 35).

If a paper has only **one or two authors**, quote the name(s) in brackets as shown above, for example: (Smith & Jones, 1993).

When a paper has three to five authors, cite all authors surnames the first time. Subsequent citations only include the surname of the first author followed by et al. (not italicised and with a period after "al") and the year. For example an article authored by Smith, Brown and Jones would be cited in the text as (Smith, Brown & Jones, 1990) in the first instance and (Smith et al., 1990) in subsequent citations.

If the paper has **six or more authors**, state the first surname only followed by the words "et al.". For example a paper authored by Smith, Brown, Haley, LeBlanc, Morris and Jones would be listed in the text as (Smith et al., 1990).

If you have cited **two or more publications by the same author** *written in the same year*, these need to be differentiated in the text and in the reference list (or bibliography) by using lowercase letters following the date. For example, the first reference in the text to the author's 1993 work will be (Akoorie, 1993a). A second paper written by Akoorie in 1993 is cited later in the text as (Akoorie, 1993b).

If the reference has **no author** (or editor, company/organisation name) cite the first few words of the reference list entry (usually the title) and the year of publication in the text. Include a page number if a direct quote is used, for example: ("Dairy industry...", 1995, p. 13). Also see the section on 'citing electronic references', for references with no authors (see below).

If the reference is an **electronic reference**, use *the same method* as for other references, i.e. (Surname of author, year of publication). If there is no author (or editor, company/organisation name) is given cite the first few words of the reference list entry (usually the title of the document).

A similar study was done of students learning to format research papers ("Using APA", 2001).

If the reference has **no author and no date**, use the first few words from the title, and the abbreviation n.d. (for "no date"). For example, ("Using APA", n.d.).

If the reference is a **personal communication**, such as telephone conversations, interviews and various types of electronic communication such as e-mail, discussion group and bulletin board postings, these should be referenced in the text but *not included in the reference list*. This is because the reader is often unable to access the source of the information due to lack of information, publication etc. Citing personal communications in the text should use the following format: (Name, title/company, personal communication, day/month/year). For example:

(Don Brash, Reserve Bank of New Zealand, personal communication, 14 November, 1997).
(Tommy's Home Page, <http://www.waikato.ac.nz/personnel/tommy.html>, 4 June 1997).

Note: the in-text reference includes (at least) the home page title, home page address and date of access. An **e-mail message** should include the sender, sender's e-mail address, date, subject of message, recipient's e-mail address:

Day, Martha (MDAY@sage.uvm.edu). (30 July 1995). Review of film - *Bad Lieutenant*. E-mail to Xia Li (XLI@moose.uvm.edu).

At the end of your paper you then list details of each reference (except personal communications) in a reference list or bibliography.

Quotations

Quotations are used to support specific points you wish to make. They should readily fit with the idea you are discussing and should thus need no further explanation. Generally, two types of quotations are used - the short quotation (a few words of clarification) and long quotations (a full sentence or two that makes a specific point by itself).

A **short quotation** (fewer than 40 words) should be incorporated in the text and enclosed by double quotation marks. It may include whole sentences or part of a sentence. For instance:

The use of adequate referencing is "absolutely essential" for professional report-writing (Hughes, 1990, p. 456).

A **long quotation** (40 words or more) should be displayed in a free standing block (like this one!), double indented from the margins, without quotation marks. Spacing in long quotes is reduced to one line (single spacing). This paragraph is an example of a long quotation (Author, year, p. xx).

Make sure you cite the reference for the quotation, including the page number. This may take several forms, for example:

According to Jones (1998), "Students often had difficulty using APA style" (p. 199).

Preparing a reference list or bibliography

Your reference list or bibliography should appear at the end of your paper. It provides the information necessary for a reader to locate and retrieve any source you cite in the body of the paper.

Where in-text or cited references only are given at the end of an essay or report, the list is titled '**References**' or '**Reference List**'. Each source you cite in the paper must appear in your reference list; likewise, each entry in the reference list must be cited in your text.

A bibliography is generally a reading list - for instance, a list supplied with course material to show suggested readings. Sometimes students wish to include a bibliography in assignments, to acknowledge items that they have read, but that are not included as in-text references. A single list including both in-text references and other reading material is usually used for academic assignments, and is titled '**Bibliography**'. In other words, the bibliography includes **ALL references** to other material that you have gathered during your research, whether they are cited in your assignment or not. The format for a Bibliography is the same as for the Reference list.

List details of each reference at the end of your paper, listed in ALPHABETICAL order. Each entry begins with the author's name and the publication date, allowing the reader to find it easily. The reference supplies full publication information about the item, for example:

REFERENCES – An Example

Holmes, T. H. & Rahe, R. H. (1967). The social readjustment rating scale. *Journal of Psychometric Research*, 11, 213-218.

Jantsch, E. (1980). *The self-organising universe: Scientific and human implications of the emerging paradigm of evolution*. New York: Pergamon.

Kim, Y.Y. (1985). Communication, information, and adaptation. In B. D. Ruben (Ed.), *Information and behaviour*, New Brunswick, NJ: Transaction Books, 32-34.

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Points to note when referencing

- The order and style used for authors' names (last name first, initials only).
- The year of publication in brackets ().

- That a full stop follows the date, followed by the title, then full stop again.
- That the title of the book or journal (i.e. the publication) is either italicised or underlined. Only the first letter of the first word (and first word following a colon) is capitalised. [Proper Nouns are also capitalised, i.e. China, English].
- The place of publication, followed by a colon.
- That the name of the publisher comes last, followed by a full-stop;
- And that all but the first line of each reference is indented (this is called a hanging indent, in MS Word under Format, paragraph)

Furthermore,

- Do not use '**et. al.,**' in the reference list, all authors must be listed for each reference.
- If there is **no author** (or editor, organisation/company) for your reference, move the title to the author position (before the date of publication). Example:

“Dairy industry haggles over future”. (1995). *The Independent*, 11 August, 13.

Merriam-Webster's collegiate dictionary (10th ed.).(1993). Springfield, MA: Merriam Webster.

- If there are **two or more publications by the same author(s)**, order them by publication date, oldest to newest.

- If you have cited **two or more publications by the same author written in the same year**, these need to be differentiated in the text and in the reference list by using lowercase letters following the date. For example, the first and second references cited in the text will appear in the reference list as:

Akooie, M. (1993a). Patterns of foreign direct investment by large New Zealand firms. *International Business Review*, 2(2), 169-189.

Akooie, M. (1993b). Pragmatism and performance: International business in the development of two small economies: Singapore and New Zealand. In O. Yau and W. Shepherd (Eds.), *Proceedings of the Academy of International Business Southeast Asia Regional Conference*, June. Brisbane, 5-11.

- **If the reference is a chapter in an edited book, use the following format:**

Higgins, M. (1990). Social network analysis: Its implications for business and business communication. In F. Sligo (Ed.), *Business communication New Zealand perspectives*. Palmerston North: Software Technology, 168-179.

(Note that it is the book title that is either italicised or underlined, not the title of the article, and that the page numbers of the specific chapter are given at the end.)

- Where the reference is a **journal article** the publisher and place of publication are not included, for example:

Georgoff, D., & Murdick, R. (1986). Manager's guide to forecasting. *Harvard Business Review*, 64(1), 110-120.

(Note that the journal title is either italicised or underlined, and that capital letters are used as in the original journal title; page numbers are given without 'pp.'; volume and issue number are given as 64(1), instead of vol. 64, no. 1; a month or season is given with the year of publication if there is no volume or issue number.)

- If the reference is an **electronic reference**, use the following formats:

Article in an Internet Periodical

Author, A. A., & Author, B. B. (Date of publication). Title of article. *Title of journal, volume number*(issue number if available). Retrieved month day, year, from <http://Web address>.

Kenneth, I. A. (2000). A Buddhist response to the nature of human rights. *Journal of Buddhist Ethics*, 8(4). Retrieved February 20, 2001, from: <http://www.cac.psu.edu/jbe/twocont.html>

Nonperiodical Internet Document (e.g., a Web page or report)

Author, A. A., & Author, B. B. (Date of publication). *Title of article*. Retrieved month date, year, from <http://Web address>.

The Foundation for a Better World. (2000). Pollution and banana cream pie. In *Great chefs cook with chlorofluorocarbons and carbon monoxide* (Chap. 3). Retrieved July 13, 2001, from: <http://www.bamm.com/cream/pollution/bananas.htm> **NOTE:** When an Internet document is more than one Web page, provide a URL that links to the home page or entry page for the document. Also, if there isn't a date available for the document use (n.d.) for no date.

Part of Nonperiodical Internet Document

Author, A. A., & Author, B. B. (Date of publication). Title of article. In *Title of book or larger document* (chapter or section number). Retrieved from <http://Web address>.

If **no author**/editor or company/organisation name is given move the title of the document to the author position (before the date of publication).

OTHER SOURCES

- **A Television Broadcast or Television Series**

Producer, P. P. (Producer). (Date of broadcast or copyright). *Title of broadcast* [Television broadcast or Television series]. City of origin: Studio or distributor.

Important, I.M. (Producer). (1990, November 1). *The Nightly News Hour*. [Television broadcast]. New York: Central Broadcasting Service.

Work discussed in a secondary source

Coltheart, M., Curtis, B., Atkins, P., & Haller, M. (1993). Models of reading aloud: Dual-route and parallel-distributed-processing approaches. *Psychological Review*, 100, 589-608.

NOTE: Give the secondary source in the references list; in the text, name the original work, and give a citation for the secondary source. For example, if Seidenberg and McClelland's work is cited in Coltheart et. al., and you did not read the original work, list the Coltheart et. al., reference in the References. In the text, use the following citation:

In Seidenberg and McClelland's study (as cited in Coltheart, Curtis, Atkins, & Haller, 1993), ...

A government publication

National Institute of Mental Health. (1990). *Clinical training in serious mental illness* (DHHS Publication No. ADM 90-1679). Washington, DC: U.S. Government Printing Office.

A translated work and/or a republished work

Laplace, P. S. (1951). *A philosophical essay on probabilities* (F. W. Truscott & F. L. Emory, Trans.). New York: Dover. (Original work published 1814).

NOTE: When you cite this work in text, it should appear with both dates: Laplace (1814/1951).

A review of a book, film, television program, etc.

Baumeister, R. F. (1993). Exposing the self-knowledge myth [Review of the book *The self-knower: A hero under control*]. *Contemporary Psychology*, 38, 466-467.

An entry in an encyclopaedia

Bergmann, P. G. (1993). Relativity. In *The new encyclopaedia Britannica* (Vol. 26, pp. 501-508). Chicago: Encyclopaedia Britannica.

Personal communications should not be included in your reference list.

Further details on writing style and referencing can be found in the APA's Publication Manual, available in the University Library.