

出國報告(出國類別:語言訓練)

## 經濟部國際經濟商務人員語言訓練

( 英文組 )

服務機關：經濟部投資業務處

姓名職稱：組員 陳怡沁

派赴國家：美國華盛頓特區

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## 目 錄

一、	目的 .....	2
二、	進修過程.....	2
	(一) 學校簡介.....	2
	(二) 課程簡介.....	2
	(三) 課程安排.....	3
	(四) 師資簡介.....	6
	(五) 校外參訪.....	7
	(六) 其他活動.....	7
三、	智庫活動.....	8
	(一) 智庫介紹.....	8
	(二) 參與活動列表.....	9
四、	駐館活動.....	10
	(一) 經濟組每月例會.....	10
	(二) 國慶晚會.....	10
	(三) 專題課程.....	10
五、	心得與建議.....	11
六、	附錄 .....	13
	(一) 結業證書暨成績單.....	13
	(二) 研修成果範例一：創業計畫 PureSoy .....	14
	(三) 研修成果範例二：政策分析 - 美國特殊專款措施.....	23
	(四) 研修成果範例三：NGO 義工活動簡報 .....	27

## 一、目的

經濟部為提高駐外經濟商務機構商務人員外國語文及涉外事務工作能力，自 98 年起訂有「經濟部派送駐外經濟商務機構商務人員赴國外接受語文訓練實施計畫」，每年選送新進商務人員赴國外進行語文訓練，106 年度選定語組為英文(美國)、西班牙文(西班牙)、葡萄牙文(巴西)、日文(日本)、越南文(越南)及印尼文(印尼)等，除透過與母語人士溝通以加強語文能力外，並安排定期至駐外館處見習，了解涉外工作內容。

鑒於英語為涉外工作使用之主要語言，且考量個人雖考取經濟部駐外商務人員英語組，但在如何精確及有效地與不同文化背景之對象溝通方面，及以英文進行專業性寫作方面，均仍有相當大的進步空間，因此選擇申請赴美國喬治城大學接受 8 個半月之語言訓練，以增加對英文之掌握。在學習之餘，亦設定了解美國歷史及文化，參與華府智庫活動等目標。

## 二、進修過程

### (一) 學校簡介

喬治城大學 (Georgetown University) 於 1789 年建立，是美國最古老的天主教耶穌會大學，在政治學、國際關係學以及社會科學領域方面極具影響力，甚至領先常春藤盟校，且因位於美國首都華盛頓哥倫比亞特區，及設有義大利、土耳其及卡達分校，吸引大量國際學生就讀。目前喬治城大學約有來自全球 130 多國之 7000 名大學生及 10,000 餘名研究生，具有不同宗教和民族背景。該校知名校友大多在美國和世界各國的公共事務領域中表現突出，其中包括美國前總統比爾·柯林頓、前任美國最高法院大法官安東寧·斯卡利亞、數十位美國州長和國會議員、數十個國家的元首和政府首腦、王室成員及外交官。

### (二) 課程簡介

喬治城大學「專業英文研究 (Professional English Study, PES)」課程隸屬於進修推廣(Continuing Study)學院，設置目的為提供非以英語為母語之外國專業人士，在各式專業場合中所需之正式英文訓練，學期時間與大學部相同，由每年 8 月底開始至隔年 5 月初結束，以聖誕新年假期區分各 16 週之上下學期，上學期 (2017 年秋季班) 以商業知識為主要教材，下學期 (2018 年春季班) 則以公共政策為主題，各頒發獨立之結業證書。

### (三) 課程安排

#### 1. 上學期(2017 秋季班)

本學期主題為商業英語(Business)，分為針對閱讀及寫作之「商用英文寫作溝通」，針對聽力及口說之「進階溝通技巧」，及針對人脈建立之「英語網絡技巧」等 3 門課程，課表安排及詳細課程內容如下：

	星期一	星期二	星期三	星期四	星期五
9:00-11:30	商用英文寫作溝通(WCB)	商用英文寫作溝通(WCB)	1 對 1 約談 華府互動	商用英文寫作溝通(WCB)	商用英文寫作溝通(WCB)
12:00-13:00	午休				
13:00-15:00	進階溝通技巧(ACS)	英語網絡技巧	進階溝通技巧(ACS)	英語網絡技巧	進階溝通技巧(ACS)
15:30-16:30				讀書會	

#### (1) 商用英文寫作溝通 Written Communication in Business (WCB)

##### A. 使用教材：

- Business Communication Essentials
- Harvard Business School Case Study：Wal-Mart, Zara, Apple, Starbucks

##### B. 教學方式

此課程透過大量閱讀課本章節與商業相關文章來幫助學員提高閱讀速度，了解各式句型結構、詞態變化和正確的標點符號使用方式，並透過商業案例研析及撰寫分析報告、各式商業書面溝通類型練習(Email, Policy Memo, 履歷, SWOT 分析以及創業計畫等)、每週新聞閱讀摘要、分組討論以及同儕檢視等方式，練習如何撰寫符合專業要求之書信及書面資料。

##### C. 上課時數：10 小時/週

## (2) 進階溝通技巧 Advanced Communication Skills (ACS)

### A. 使用教材：

- 2009 年金融危機相關影片及採訪錄音
- 微型信貸(Microfinance)相關影片
- 商業道德(Business Ethic)相關影片
- 談判(Negotiation)相關影片: Getting to yes、Stuart Diamond、Top salary negotiation tip for women、Cross culture Negotiation

### B. 教學方式

透過聽力填空練習、小組討論、英文新聞影片摘要簡報等多元化教材及方式，及配合商業英文寫作溝通課程報告主題進行正式簡報，訓練口說文法、聽寫筆記製作、投影片製作以及正式簡報技巧，尤其強調英文演說正式架構及不同主題間之連接技巧(transition)，並定期與教授個別檢討表達及發音問題。

### C. 上課時數：6 小時 / 週

## (3) 英語網絡技巧 Professional Networking in English

### A. 使用教材：授課教師自行編製教材及活動紀錄

### B. 教學方式

本課程主要目標為練習建立人脈，主要分為兩階段，前 8 週自行參與智庫活動，主要目標練習破冰技巧，每次活動必須結交 1 位以上參與活動之專業人士，並在接觸 DC 活動中向全體語言課程學生簡報學習心得；後 8 週除持續參與智庫活動外，需自選主題參與 2 場以上活動，並需取得至少 1 位與會專家聯絡方式，會後以電子郵件提出問題，並寄發致謝郵件，嘗試維持聯繫，期末則針對自選主題進行壁報式簡報(Poster Presentation)。

### C. 上課時數：4 小時 / 週

## 2. 下學期(2018 春季班)

本學期主題為公共政策(Public Policy)，分為針對閱讀及寫作之「專業閱讀寫作應用」，針對聽力與口說之「商業領導討論」，及針對人脈建立之「專業網絡技巧應用」等 3 門課程，並配合課程參訪相關政府機構，課表安排及詳細課程內容如下：

	星期一	星期二	星期三	星期四	星期五
9:00-11:30	專業閱讀 寫作應用 (ARW)	專業閱讀 寫作應用 (ARW)	華府互動	專業閱讀 寫作應用 (ARW)	專業閱讀 寫作應用 (ARW)
12:00-13:00	午休				
13:00-15:00	商業領導 討論 (BLDS)	專業網絡 技巧應用	商業領導 討論 (BLDS)	專業網絡 技巧應用	商業領導 討論 (BLDS)
15:30-16:30				讀書會	

### (1) 「專業閱讀寫作應用 Professional Application in Reading and Writing (ARW)

#### A. 使用教材：

- Organizational Behavior, by Friedman Lawrence
- The Extraordinary Leader, by Zenger, J and Folkman
- American Law, by Lawrence M. Friedman and Grant M. Hayden
- The NGO Handbook, IIP Publications

#### B. 教學方式

每堂課均有指定文章閱讀後之分組課堂討論，針對閱讀主題練習短文寫作，由透過撰寫摘要、政策分析報告，以及研究分析報告等方式，漸進式培養撰寫長篇報告之能力。此外，並逐一複習文法主題，並進行針對式應用練習。

#### C. 上課時數：10 小時/週

(2) 商業領導討論 Business Leadership and Discussion Seminar

A. 使用教材：

- American Accent Training
- TED Talk 影片
- 7 Habits 影片

B. 教學方式

透過摘要 TED Talk 進行簡報並主持課堂討論，練習主導座談進行帶領討論，配合「專業閱讀寫作應用」主題練習辯論，並針對英文個別不同發音逐一練習，每週 15 分鐘個別發音指導。

C. 上課時數：6 小時/週

(3) 專業網絡技巧應用 Professional Application in Networking

A. 使用教材：無

B. 教學方式

前 8 週選定研究主題後，透過參與相關智庫活動及資料研究鎖定訪問目標，邀訪選定領域之專家學者至少 1 名，參與 1 次培訓課程；後 8 週參與 NGO 活動並擔任志工，了解 NGO 運作方式，及為美國癌症研究募款活動 Relay for life 募款。

C. 上課時數：4 小時/週

(四) 師資簡介

1. Professor Glen Penrod

(1) 職稱：Assistant Teaching Professor

(2) 學歷：MA in Applied Linguistics, Brigham Young University

(3) 經歷：曾在臺灣及韓國從事英語教學，並出版過英語學習材料、英語學習 APP，於 2010 年時加入喬治城大學至今。

(4) 教授課程：

- 上學期(2017 秋季班)：Written Communication in Business (WCB)
- 下學期(2018 春季班)：Business Leadership and Discussion Seminar Professional Application in Networking

## 2. Professor Heather Gregg Zitlau

- (1) 職稱：Assistant Teaching Professor
- (2) 學歷：MA in ESL, University of Minnesota
- (3) 經歷：曾在韓國從事英語教學，並在亞美尼亞的美國和平工作團擔任志工從事教師訓練，於 2012 年加入喬治城大學至今。
- (4) 教授課程：
  - 上學期(2017 秋季班)：Advanced Communication Skills (ACS)  
Professional Networking in English
  - 下學期(2018 春季班)：Professional Application in Reading and Writing (ARW)

### (五) 校外參訪

1. 上學期(2017 秋季班)
  - 賓州阿米希村落參訪 Amish Village (2017.11.11)
  - 印鈔廠 Bureau of Engraving and Printing(2017.12.01)
  - 大屠殺博物館 History of The United States Holocaust Memorial Museum (2017.12.01)
2. 下學期(2018 年春季班)
  - 高等法院 Supreme Court of the United States(2018.02.22)
  - 國會山莊 Capitol Hill(2018.02.27)
  - 國會圖書館 Library of Congress(2018.02.27)
  - 馬里蘭州州議會(2018.03.16)
  - 新聞博物館 Newseum (2018.03.28)
  - 專利博物館 National Inventors Hall of Fame Museum(2018.05.02)

### (六) 其他活動

#### 1. 華府接觸(Access DC)

為增加國際學生間互動，並增加對美國文化及華府週邊環境之了解，喬治城大學語言中心不定期安排夜遊華府導覽、波多馬克河泛舟、滑冰、博物館參觀及戲劇觀賞等活動。

#### 2. 華府互動 (Interact DC)

每週三上午邀請華府週邊不同專業人士提供不同主題演說，例如氣象新聞主播、原住民權益推動倡議者、專利律師等，「專業英文研究」及「大學



橋接(Bridge)」課程學生亦在相同場核發表期中成果簡報。

### 3. 讀書會(Book Club)

每週閱讀一篇文學類短文或短篇小說，在每週四課後聚會時間(coffee hour)由不同教授帶領小組討論，並針對不同程度同學推薦閱讀書單。

### 4. 語言交換(Language Partner)

每學期安排國際學生與喬治城大學部學生進行語言交換，透過每週固定與語言交換夥伴聚會，增加與母語人士交談機會。

## 三、智庫活動

美國首都華府因其獨特之政治地位，各式智庫及非政府組織數量極多，各大小智庫每週均舉辦主題廣泛之演說、研討會及新書發表等各種活動，以增加其能見度及遊說力道，考量未來業務需求，主要參與大型智庫關於貿易、投資等經濟及美中關係等議題之活動，僅就進階溝通技巧及專業網絡技巧應用課程參與之智庫及其活動介紹如下：

### (一) 智庫介紹

#### 1. 戰略與國際研究中心(Center for Strategic and International Studies, CSIS)

美國知名跨黨派政策智庫，成立於 1964 年，原隸屬於喬治城大學，1987 年獨立，其目標為「提供戰略洞察力和政策解決方案，交由政府、國際機構、私營部門和民間社會進行決策」，故該中心研究中心為技術、公共政策、國際貿易和金融、能源等。

#### 2. 布魯金斯學會(Brookings Institution)

美國研究社會科學著名智庫，研究重心為經濟與發展、都市政策、政府、外交政策以及全球經濟發展等議題，該學會研究報告經常受到跨黨派政治人物引用，曾被評選為全球最有影響力智庫。

#### 3. 彼得森國際經濟研究所(Institute for International Economics, PIIE)

成立於 1981 年之非營利無黨派智庫，主要研究課題為債務及發展、國際金融及總體經濟、美國經濟政策、國際貿易及投資等，PIIE 雖成立時間較晚且規模較小，但其專注經營經濟領域，且分工精細，影響力超過許多規模更大之研究機構，惟其研討活動多為邀請制，僅對外提供網路直播及線上提問。

#### 4. 美國傳統基金會(the Heritage Foundation)

成立於 1973 年之保守派智庫，對美國公共政策制定有長遠的影響力，主張小政府、捍衛個人自由及傳統價值，並強調國防實力，在美國川普總統就任以來，此基金會之影響力大幅提升。

#### 5. 卡托研究所(Cato Institute)

1977 年成立於舊金山之智庫，1981 年遷移至華府，研究所自許以「擴展公共政策辯論的角度」參與政策制定，主張「恢復小政府、個人自由、市場經濟、以及和平的美國傳統」，雖自詡為自由派智庫，其主張與美國傳統基金會較為接近。

#### 6. 美國企業協會(American Enterprise Institute, AEI)

成立於 1943 年，旨在資助對美國政府在經濟與政治政策上的研究，研究涵蓋經濟與貿易、社會福利、政府稅收、消費、法律、美國政治、國際關係、美國國防與外交政策等領域。

### (二) 參與活動列表

1. Four Famines: Fragility, Resilience, and the Role of International Development
2. The State of American Diplomacy
3. Circles of Compensation: Economic Growth and the Globalization of Japan
4. DC Confidential: Inside the Five Tricks of Washington
5. The Rise of Populism: An Ebbing or Flooding Atlantic Tide?
6. Realizing the Promise of Evidence-Based Policymaking
7. Why Brexit Is Great for the UK and the USA
8. Free Speech Victories: Sports, Bands and Beer Win in the Courts
9. Health in a Time of Austerity – Can Fiscal Measures Help?
10. The State of the Press Today: Whose Interests Does It Serve?
11. Japanese internationalism in an era of upheaval
12. NAFTA renegotiation: international trade and arbitration going forward

13. 50 Shades of Urban Slums: Adolescents' Lives, Love & Reproductive Well-Being
14. Building a U.S. Trade Enforcement Agenda that Works
15. Designing Reality: How to Survive and Thrive in the Third Digital Revolution
16. Bully of Asia: Why China's Dream Is the New Threat to World Order
17. Trump's trade policy in Asia: A one-year review
18. The Return of Marco Polo's World

#### 四、駐館活動

##### (一) 經濟組每月例會

駐美國代表處經濟組每月 1 次例行會議，與委辦計畫執行顧問討論 1 個月內美國主要政策變動與未來發展方向，以迅速提供國內美國政策發展資訊，經濟組陳組長要求語訓學員列席參與例會，並就討論之政策提出問題。

##### (二) 國慶晚會

106 年 9 月 23 日赴雙橡園參與籌備會議，並於 10 月 4 日協助國慶晚會活動進行。

##### (三) 專題課程

為協助語訓學員及經濟組新進人員了解美國政策，經濟組特請顧問安排美國政策相關課程，並藉國內學者訪美契機安排研討課程如下：

1. 美國貿易政策簡介
2. 美國貿易政策制定
3. 林若零教授新南向政策討論會
4. 美國海關邊境措施、反傾銷與平衡稅、232/301/337 法規研習

## 五、心得與建議

### (一) 學習心得

到美國華府接受近 9 個月的語言訓練對我而言是相當寶貴之經驗，雖然學習英文 10 幾年，但從未到英語系國家生活，這幾個月除了在語言專業能力、異地生活及跨文化溝通方面學到很多，對未來駐外生活的所需要面對的挑戰有更深的認識。

在語言能力方面，在出發前對於口語表達與聽力相當有自信，當時認為未來研修期間主要目標為加強寫作能力，但日常生活及課堂中發現，我的口語能力僅能應付日常對話，對於在工作場合中之精練表達能力仍然相當欠缺，尤其在使用正確的時態及辭彙選擇方面，遭遇到相當大的挑戰，開始面對及改正問題時，流暢度大幅下降，在學校教授以及語言交換夥伴的協助下，逐漸兼顧流暢與正確精簡的表達；加強寫作能力是出發前既定的目標，在大量作業及練習下，除逐漸加快寫作速度外，可深入了解部分同義詞中，語氣之些微差異，以及英文書面表達非常強調之架構及邏輯，對未來工作需要翻譯或是撰寫英文資料應有相當大的幫助。

在專業知識方面，受惠於華府地區眾多的智庫，參加各智庫舉辦之活動，可接觸當下最受重視的討論議題，在活動中問題討論中，有時甚至可了解美國甚至其他國家希望推動之政策方向訊息，且恰逢美國川普總統上任後帶來高度不確定性之時機，不同立場之智庫對於類似議題常有南轅北轍之立場與看法，雖多數活動均提供線上直播，但在現場可提出問題並參與討論，在會後亦可接觸與會之學者專家，因此在相關活動中常可遇到駐地長官親赴活動現場了解最新發展，在臺灣較難有機會參與類似活動，是獨特的寶貴經驗。

因喬治城大學為國際名校，學生來自世界各地，在與來自不同國家及文化背景同學合作過程中，接受到不少文化衝擊，舉例而言，課程安排 PES 學生帶領其他班級學生拍攝喬治城大學語言中心廣告影片，作為領導相關課程之實習，溝通過程中，部分中東國家女同學表示宗教及文化不允許他們在可能外流之影片中出現，因此無法擔任特定工作，另外義賣來自各國的點心為癌症研究募款時，亦需要考慮各文化可以接受的飲食種類，加上班上同學包含來自日本的創業家，中國大陸微型信貸管理人員、專利律師，以及巴西非政府組織經營者等各種不同背景，在合作過程中需要大量的溝通與磨合，對未來在其他國家工作提供寶貴之經驗。

最後在生活方面，第一次在異地獨立生活，從銀行開戶、尋找合適租屋地點、簽約、安排水電網路以及購買必備家具等，常常遇到意料之外的問題，必須一個人獨力處理，對於未來外派生活亦是相當好的預習。

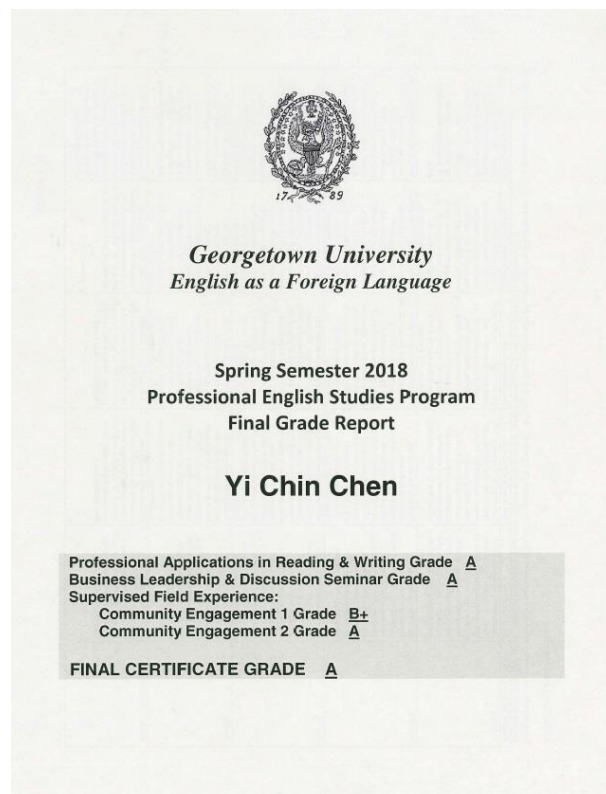
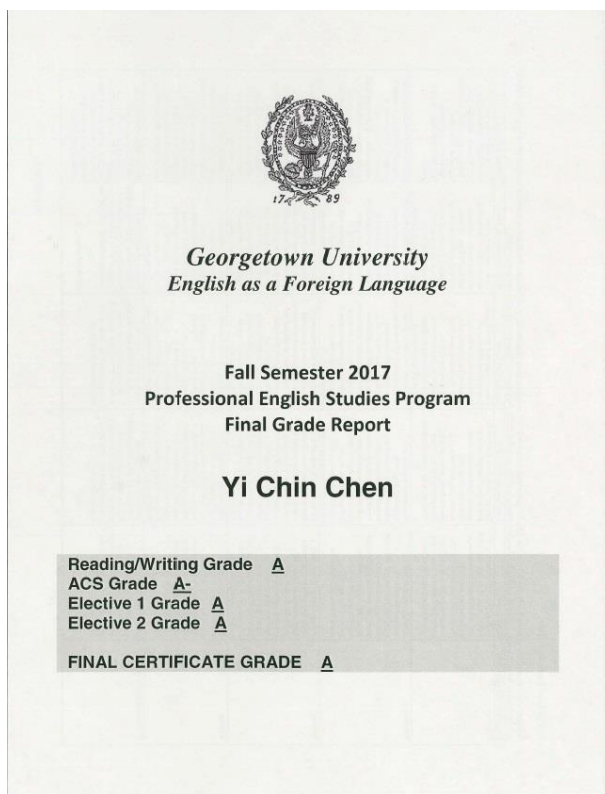
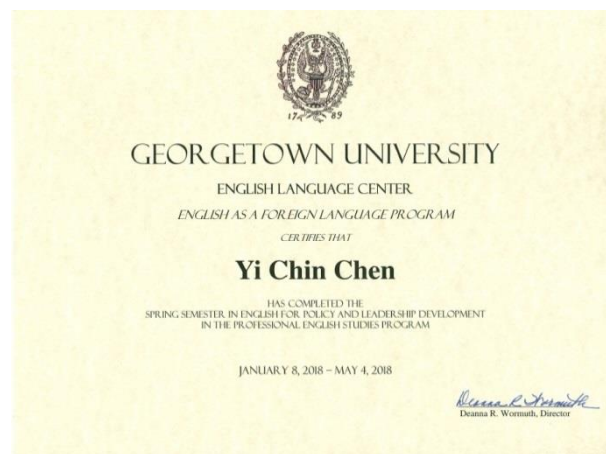
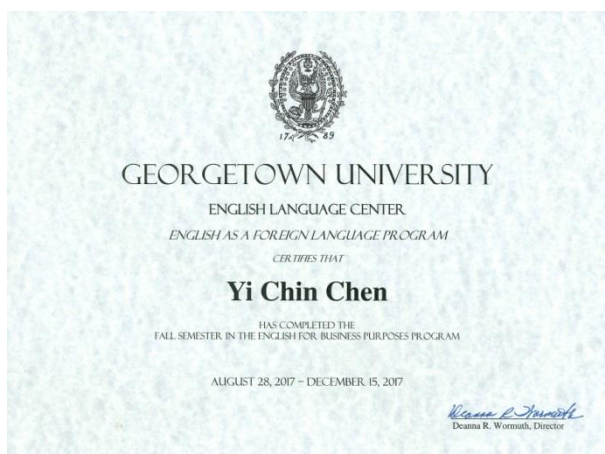
## (二) 建議

在課程安排方面，由於喬治城大學語言中心 PES 課程採取小班教學，且聽說讀寫課程緊密配合，每人均有機會在聽說讀寫各方面充分練習，但也因整體規模較小，無法如規模較大之學校依照個人需要提供選課彈性，通常學生聽說讀寫之能力並不一致，PES 更因為課程獨特，在學生程度上差異可能影響學習效果，建議與喬治城大學語言中心溝通，可提供在聽說讀寫能力差異較大的學生跨班上課之彈性，並研議在聽說讀寫的必修課程外，提供美國歷史、小說閱讀或專業寫作等程度較高之選修課程。

在生活安排方面，因上課地點移至靠近市中心之推廣學院，離喬治城大學約 45 分鐘車程，且喬治城大學無法提供足夠宿舍給語言中心學生，語訓學員必須自行在外租屋，考量語訓時間不足 9 個月，且華府地區租金昂貴，建議每年協助蒐集可能接受短期租約之租屋資訊，以降低學員尋找住宿之困難。

## 六、附錄

### (一) 結業證書暨成績單



(二) 研修成果範例一：創業計畫 PureSoy

# Pure Soy

Every slip you take makes you and our earth better.

## Executive Summary



Prepared by Yichin Chen,  
CEO of Pure Soy

Presented to Venture Capitalists  
Georgetown University  
December 11, 2017

# Pure Soy

## Organic Soy Milk

### 1. Origins/ Background

Nowadays both health and the environment play more important roles in people's lives. Consumers not only care about how products affect their bodies but also how they affect our planet. Organic pure soy milk satisfies the public desire for a healthy and environmentally friendly beverage.

Some people might question whether the soy milk on the market is really healthy or not because most of the soy milk in the US is sweetened and flavored. Unlike in the East Asian market, it is difficult to find unsweetened, non-GMO soy beverage in stores in the US. Therefore, we believe that there is a big market for pure soy milk.

### 2. Goals

Our goal is to create a healthier and greener world for the next generation by offering a healthy and environmental friendly beverage. We are what we eat. We believe that drinking soy milk not only promotes a healthier lifestyle but reduces the burden on our earth. We hope we can change the world by changing people's choice of food. Every sip you take makes you a better person and our world better.

### 3. Product

Pure organic soy milk, a beverage made only of non-GMO soy beans and water, is both beneficial for humans and the earth. Soy milk contains nutrients human bodies need, such as abundant protein, dietary fiber, calcium, magnesium and vitamins. Some experts believe that soy milk reduces cholesterol and may decrease the risk of cancer. It also offers people different sources of nutrition and creates more variety of food, especially for those people who cannot drink milk. On the other hand, soy milk also benefits the environment. Compared to planting, animal husbandry consumes more natural resources and produces more carbon-dioxide, but offers less amount of food. Given that having a more vegetarian diet is beneficial to our environment, drinking soy milk instead of milk also brings positive effects to our earth.

We offer organic pure soy milk in 2 different package sizes: 20oz and 1liter. Besides pure soy milk, we also offer a wide range of soy milk based recipes on our website. Our customers can learn to make the drink sweet, salty or make soy milk hot pot from the videos on our website.



#### **4. Market Potential**

The global soy milk market size is expected to grow because of the increasing consumer awareness on health and growing population of vegans. As a cheap plant-based substitution for dairy milk, the major disadvantage of soy milk is its taste. Most of people in the US are used to the taste of cow milk, and don't like the strong flavor of beans. However, after decades of marketing efforts by some food companies, like Silk, and vegetarian advocates, more and more people accept the exotic favor of soy milk. "Plant-based foods have seen their popularity surge over last ten years and it represents more than \$3.5 billion in sales," claim analyst Terpolilli (McGrath 2016.)

#### **5. Key Customers**

Our targeted customers are people who are health conscious, have environmental concerns and care how their food is produced. Some statistics show that women are more health conscious, and they have changed the type of products offered on the market, "especially in the health-conscious arena," according to Women in the food and Beverage industry white paper (Snyder, 2015.) In addition, based on the survey conducted by POPSUGAR, 97% of women have control of grocery purchases for their families (McLoughlin, 2015). Women consumers are concerned more about ingredients and how they are made, and pursue low sugar, natural/organic, fair trade and non-GMO products (Snyder, 2015.) Therefore, we believe our target customers are middle to high income females who live in Washington DC and its nearby area.

Besides, soy milk is a popular beverage in the East Asian diet. Considering 4% of the US population are Asian and there is huge amount of middle to high income households in District of Columbia (Census Bureau, 2017), we strongly believe that there is a niche market for our organic pure soy milk.

#### **6. Market Segmentation and Access Strategy**

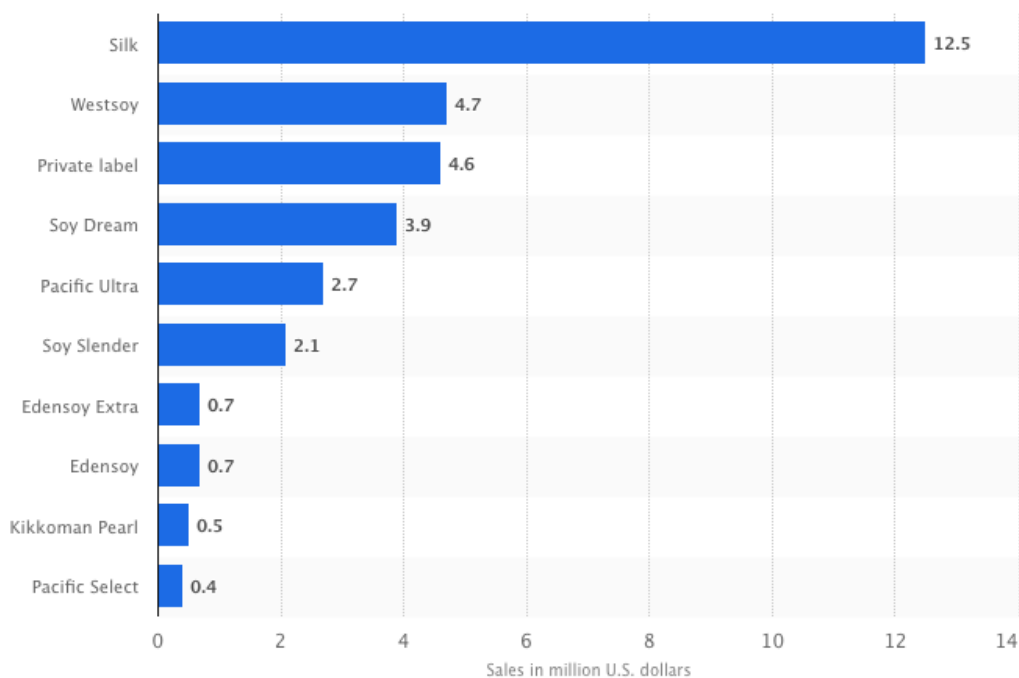
Since Pure Soy provides high quality soy milk which is healthier and greener than those products sold in supermarkets, the price of our soy milk is higher. Besides, considering the nature of soy milk and carbon footprint, Pure Soy focuses on those targeted consumers in the local market, particularly upper middle income households in the great Washington D.C. area, including Virginia and Maryland.

We plan to launch our marketing campaign, which includes test drinks, local activities sponsorship, and cooperation with yoga classrooms and gyms. By sponsoring sports activities, such as elementary school football games, we are able to set up test tasting booth to promote our soy milk to mothers, one of major targeted consumers.

We also are going to collaborate with yoga teachers and gym coaches. For example, we may exchange advertisement on our website, or provide special discounts for their customers.

## 7. The Competition

Since soy milk and other plant-based beverages have become more and more popular in the US, lots of food companies are joining or plan to join this market. According to Global Market Inside, soy milk was first launched by Vitasoy in U.S. in 1969. Now the major market competitors are Eden Foods, Pureharvest, Vitasoy International Holdings Ltd., Organic Valley, Pacific Foods of Oregon, Inc., Alpro, WhiteWave Foods, Stremicks Heritage Foods, Palsgaard, Soy Fresh, Hershey Company, Staeta, Hain Celestial Group, Inc., Kikkoman Corporation, NOW Foods, So Delicious Dairy Free, etc. The dominant manufacturer in the soy milk market is WhiteWave, whose brand Silk can be found in every supermarket. Silk not only sells soy milk but also provides other plant-based beverages, such as almond milk, cashew milk, and coconut milk. However, because the major sales of Silk are sweetened and flavored ones, some people may argue that soy milk is not as healthy as these companies claim. Even its organic unsweetened soy milk contains other ingredients like salt, natural flavor and Gellan gum.



In addition to those soy milk manufacturers, we also have to face competition from other plant-based beverage, such as almond milk, and animal dairy products. For

other plant-based beverages, the major competitor in our targeted market is still WhiteWave. Their products share similar weakness: most of its beverages contain food additives. The strength of Pure Soy is that we can provide fresh pure soy milk that is considered healthier and greener. On the other hand, although cow milk is the most popular breakfast beverage in the US, from the significantly growing soy milk market, we can find that soy milk is an alternative for American people. Therefore, although there are already many companies in the market, we still believe that there is a small niche market for us.

## **8. Management team**

Although Pure Soy is a small company serving the local market, we spare no effort to provide the best product to our customers. We rely on our experienced management team to achieve our goal. Our team members include:

### Chief executive officer: Yichin Chen

Ms. Chen is the founder of Pure Soy. She graduated from Cass Business School in 2009, and majored in Marketing. Before starting her own business, she worked in Unilever plc for 5 years in Food department in the US. Her major job includes the basic financial management, marketing campaign and overall operation.

### General Chef: Gordon Deng

Pure Soy only provides one product, that is high quality organic pure soy milk. Therefore, our most important task in Pure Soy is manufacturing healthy and tasty soy milk because taste is one of the major factors that affects customers' willingness to purchase our product. Chef Deng graduated in Kaohsiung University of Hospitality and Tourism, and has 20 years of experience of making soy milk in Taiwan. He is also the winner of Chinese Cuisine Heritage Award.

### Accountant: Chris Wolff (contract)

Mr. Wolff had a master degree in Accounting from Ohio University, and has owned an accounting firm for more than 20 years. He is an expert in assisting small companies in food industry. We have hired him to assist our financial management.

### IT Support: Penelope Garcia (contract)

In order to facilitate our customers to order online and to demonstrate some recipe videos, we decided to sign a contract with Penelope Garcia to build and maintain our own website. Ms. Garcia graduated from Caltech and has expertise in constructing online transaction platforms. She has more than 5-years of experience in creating

and maintaining online stores.

### Other personnel

We will hire one or two assistants to help the chief produce soy milk and sell it in stores depending on the sales circumstances

## **9. Financial forecasts**

### **(1) Startup costs**

To start to produce and sell high quality soy milk locally, Pure Soy is going to rent basic infrastructure in suburb on D.C., and build our own online shop. After market survey, we calculate the costs of the first year as follows:

Item	Expense (in US dollars)
Kitchen Rent	18,000
Machinery and Tools	12,000
IT Service	9,000
Accounting	6,000
Marketing Champaign	8,000
Ingredients	40,000
Wages	60,000
Owner's draw	35,000
Utilities & Insurance	2,400
Interest of Loan	2,400
<b>Total</b>	<b>192,800</b>

### **(2) Sales forecast**

According to an estimate by the United States Census Bureau (2016), there are the 6,772,470 people in the greater Metropolitan area of Washington D.C., which ranked 6th in the United States, and with nearly 15% growth rate. Given many of the residents in the D.C. area are in upper middle to high income households, we assume that we can access 10,000 people in our marketing campaign in the first month, and 2% of them may be interested in our product. We believe that 30% growth in the first three months is a reasonable assumption. After that, the grow rate will decrease continuously. Considering we only have a kitchen to produce pure soy milk, we can only provide less than 2500 liters per month in the first year. Besides, by the increasing amount of soy milk we produce, the cost will gradually decrease. Therefore, we expect our sales and gross margin to be as follows:

Item/ Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
sales forecast	0	400	520	676	879	1,055	1,265	1,519	1,670	1,837	2,021	1,577
price per liter	9.9	9.9	9.9	9.9	9.9	9.9	9.9	9.9	9.9	9.9	9.9	8.9
total sales	0	3,960	5,148	6,692	8,700	10,440	12,528	15,034	16,537	18,191	20,010	14,032
cost per liter	3.5	3.5	3.4	3.3	3.2	3.1	3.0	3.0	3.0	3.0	3.0	3.0
total cost	0	1,400	1,768	2,231	2,812	3,269	3,796	4,556	5,011	5,512	6,064	4,730
gross margin	0	2,560	3,380	4,462	5,888	7,171	8,732	10,478	11,526	12,679	13,946	9,302

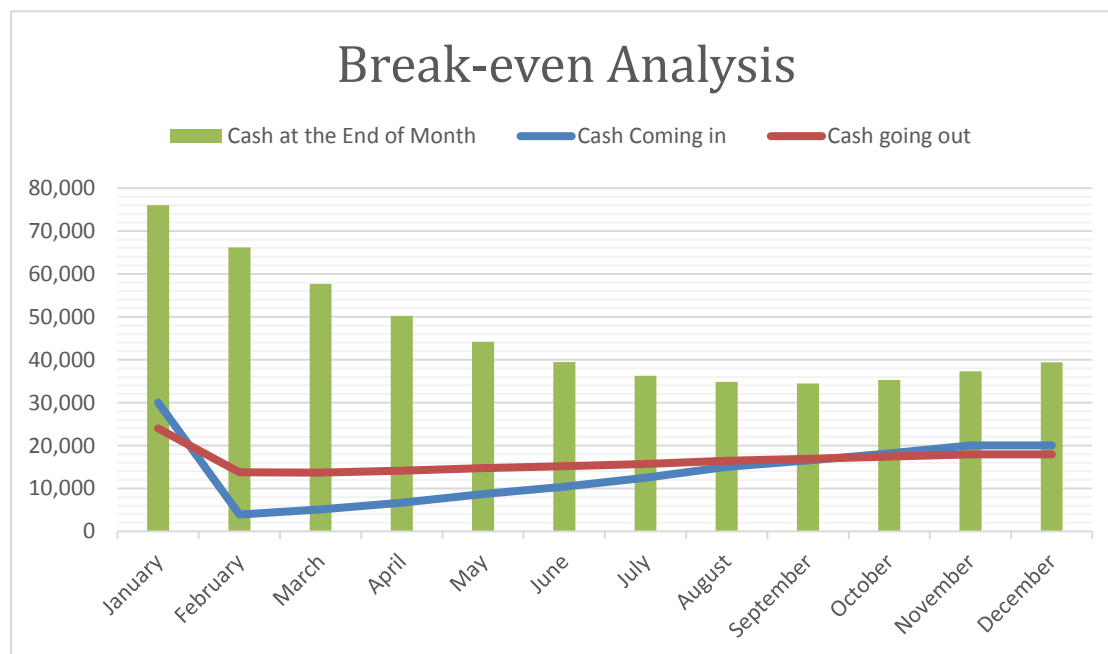
### (3) Cash flow statement

After calculate our forecasted revenue and expected cost, we generate the cash flow statement for the first year as follow.

Item/ Month	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
Cash at Start of Month	70,000	76,000	66,160	57,640	50,202	44,190	39,461	36,292	34,870	34,496	35,275	37,321
Cash Coming in												
Sales Paid	0	3,960	5,148	6,692	8,700	10,440	12,528	15,034	16,537	18,191	20,010	20,010
Loan & Transfer	30,000	0	0	0	0	0	0	0	0	0	0	0
Total Cash in	30,000	3,960	5,148	6,692	8,700	10,440	12,528	15,034	16,537	18,191	20,010	20,010
Cash going out												
Inventory	1,600	1,400	1,768	2,231	2,812	3,269	3,796	4,556	5,011	5,512	6,064	6,064
Rent	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500
Machinery and Tools	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Wages	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
Utilities	100	100	100	100	100	100	100	100	100	100	100	100
Accounting	500	500	500	500	500	500	500	500	500	500	500	500
Insurance	100	100	100	100	100	100	100	100	100	100	100	100
IT Services	9,000	0	0	0	0	0	0	0	0	0	0	0
Marketing Expense	2,000	1,000	500	500	500	500	500	500	500	500	500	500
Loan Payment	200	200	200	200	200	200	200	200	200	200	200	200
Owner's draw	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
Total Cash out	24,000	13,800	13,668	14,131	14,712	15,169	15,696	16,456	16,911	17,412	17,964	17,964
Net Cash Flow	6,000	-9,840	-8,520	-7,438	-6,012	-4,729	-3,168	-1,422	-374	779	2,046	2,046
Cash at the End of Month	76,000	66,160	57,640	50,202	44,190	39,461	36,292	34,870	34,496	35,275	37,321	39,368

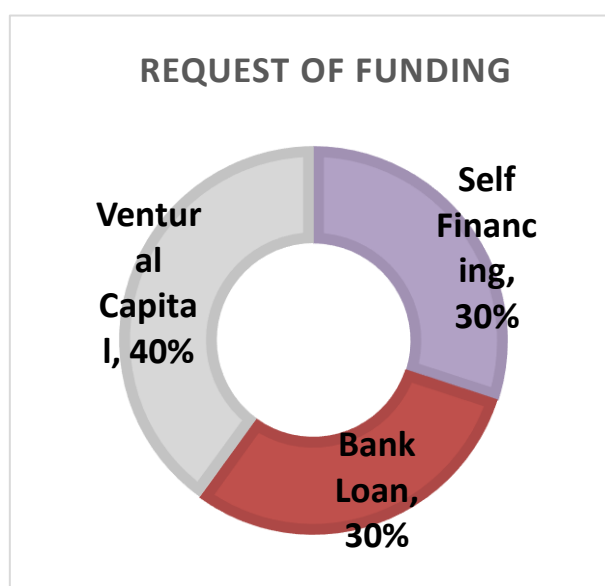
#### (4) Break-even analysis

According to the cash flow statement above, we can find that both the cash inflow and outflow are going to increase gradually since the second month. However, the growth rate of cash inflow is much higher than the growth rate of cash outflow. Therefore, we expect Pure Soy to break even in the eighth month, and start to generate net cash inflow in the ninth month. After having a stable net cash inflow in our company at the end of next year, we plan to invest in our kitchen and enlarge our capacity of production.



### 10. Required financing

In the previous sections, we calculated the estimated expenses in the first year and forecasted sales. We found that although the expenditures in the first year is close to 200,000 dollars, it only needs 100,000 to initiate our business and the gross margin will generate the other 50%. The owner plan to provide 30,000 dollars from her savings, and to inject another 30,000 from banks loans and government grants. Therefore, our goal is to raise 40% of initial funds from venture capital, which is 40,000 dollars.



## 11. Exit strategy

We strongly believe what Pure Soy provides not only helps people stay healthy but assists them to maintain a sustainable earth, and therefore, we want Pure Soy become a sustainable business. We plan to offer stock buyout opportunities at the end of the 5th year. We are also going to seek strategic cooperating allies on the market, and we welcome all kinds of cooperation, mergers or acquisition opportunities.

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### (三) 研修成果範例二：政策分析 - 美國特殊專款措施

#### **Public Policy - Earmark Elimination Act of 2018**

Recently, while President Trump surprisingly welcomed back earmark six years after the Republicans banned it, Jeff Flake, a Republican Senator from Arizona, propose eliminating earmarks forever. This conflict, which is not unlike the repetitive argument raised every two years about earmarks, shows again that debates regarding the usage of earmarks have long existed. In order to discuss the necessary of earmark, this paper covers introduction of earmarks, the effect of the Earmark Elimination Act, arguments from both supporters and opponents of this act, and a final recommendation for whether Congressmen should support this act.

#### **Definition and History of Earmark**

Earmarks, in public finance in the US, mean a specified small portion of federal budget used in a specific purpose, of which Congressmen have discretion, in a spending bill. The US constitution has assigned the Congress, the House of Representatives, in particular, to be the keeper of national expenditure, which is usually referred to “the power of the purse,” since the House “was more immediately the representatives of the people, and it was a maxim that the people ought to hold the purse-strings.” (National Constitution Center, 2017) During the congressional allocation process, earmarks are considered a strategy to incentivize cooperation and rapid response to the voters, but it often raises concern regarding bribery and benefiting interest groups as well.

Although the Democrat majority House had reformed transparency rule of earmarks in 2007 (Rauch, 2018), earmarks were temporarily prohibited through an internal decision of the House Republican Conference in 2010 because of public outcry about the dramatic increase in earmark number, questionable spending, and cronyism. (Wikipedia, 2018) The decision was in effect in 2011 and has not been lifted till today. Contradictory to what laypeople expected, many experts in public policy argue that transparency reform of earmarks in 2007 and the desire to be re-elected have restricted the usage of earmarks. The argument of earmarks has never subsided; rather, the debate bounces back in the Congress every few years.

#### **Effect of the Earmark Elimination Act**

The Earmark Elimination Act of 2018 (2018) outlaws earmarks in all federal level, including bills, resolutions, amendments, and motion in general, and it is not necessary to be extended every few years as the earmark ban which Congress



executes now. There is no exception unless there is a two-third affirmation vote by the Senate.

### **Arguments from the Supporters of Elimination Act**

Unlike the Democrats, most of whom highly value earmarks, the Republicans generally hold negative opinions toward earmarks. The three major reasons to oppose earmarks are forming diversion from priority of government budget, encouraging collusion, and creating wrong justifications for appropriation; people against earmarks also strongly doubt the “greasing effect” in solving bipartisan deadlock (Alexander and Ellis, 2014).

Earmarks are considered to distort the budget priority by delaying important needs or by decreasing the amount of spending on essential projects. Given the limited government budget every year, the more money is spent on earmarks, the less can be spent on the “planned” programs. In addition, giving Senators and Representatives the right to insert earmarks in appropriation bills is not unlike rewarding campaign contributors; on the contrary, it almost can be considered bribery, claim Alexander and Ellis (2014).

Furthermore, Congressmen’s decision about earmarks often rely on political decisions rather than cost and benefit analyses (Alexander and Ellis, 2014); for this reason, some earmarks bring such limited advantages to a small portion of people that it is usually considered a waste of taxpayers’ money. “The bridge to nowhere” in Alaska is the most infamous example.

### **Views from the Opponents of the Elimination Act**

Although many advocates admit that earmarks are not a panacea for bipartisan dilemmas, they still firmly believe that it is better to have them, for earmarks can provide incentives for cooperation and quick response to the needs of the constituency and can serve as an efficient way to stop the power shift from legislature to administration. Moreover, the recent earmarks ban proved that politicians are still continuing “politically-motivated spending” with different titles, so opponents believe that what we actually needed is to further reform the rules of earmarks.

Some experts see earmarks as “a form of political currency” because they motivate critical members from the other party to collaborate (Rauch, 2018). According to Theodoridis, Hanson, and Johnston (2016), 66 percent and 45 percent of voters who support the Democrats and the Republicans, respectively, admitted that they would like to support a candidate who secured spending for their districts; this rationale,

thus, shows earmarks create strong incentives for legislators who want to continue being in office to collaborate. Some supporters of earmarks also pointed out that earmarks fit the intention of the nations' founders since the Constitution authorized the House of Representatives to prioritize and allocate government expenditures, and there is a long tradition of logrolling in US politics.

Instead of authorizing bureaucrats to allot resources, Congress can use earmarks to directly react to their voters. Even though the US Congress has gradually handed over more power to both executive and judicial branch, banning earmarks will further weaken its capacity to fulfill its obligation of monitoring government spending. (Theodoridis, Hanson, and Johnston, 2016).

The result of the earmarks restriction that the Republican House has enforced since 2011 shows that eliminating earmarks will not stop collusion or "pork-barrel" politics, and there are still plenty of methods other than earmarks to achieve the same interest-exchanging purpose. In fact, after reformation of transparency rule in 2007, an expert in the Brookings Institute affirmed the efficiency of using earmarks and said that "if you wanted to create a non-bureaucratic, transparent system of rapid-response grants for pressing local concerns, you would come up with something very much like today's earmarking system" (Rauch, 2018).

### **Recommendation for Legislators**

Considering that "give-and-take" is one major foundation of democracy, and that the society as a whole will better off after comprising, I strongly affirm the importance of earmarks. Even though evidence neither guarantees that earmarks will solve gridlock in the dysfunctional Congress nowadays, nor that the presence of earmarks will definitely facilitate bills to pass, Grinnell College political scientist Peter Hanson indicated that "restoring [earmarks] in some version could give leaders a tool to build bipartisan coalitions by attracting Democrats who might otherwise vote against GOP measures," and that might bring some momentum to change the current situation. I believe that momentum is needed; for all of these reasons, thus, I am against the Earmark Elimination Act.

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(四) 研修成果範例三：NGO 義工活動簡報



On DC Emancipation Day, community residents will join Washington Parks & People to light 2,000 candle luminaries in honor of 8,428 African Americans who were buried in Mount Pleasant Plains Cemetery, the largest unmarked African American cemetery in the capital, after they gained their freedom during the Civil War.

To grow city-wide park-based community health & vitality by nurturing innovation & partnerships

Source: <https://www.washingtonparks.net/>

2,000 candle luminaries

