

EXECUTIVE COMMITTEE SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Executive Committee of Faculty Council for the 2021-22 academic year will be held remotely (via Zoom) on Friday May 13th at 11:30am.

AGENDA

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2. Review of May Faculty Council Agenda and Documentation	2-290
3. Other Business	
4. Adjournment	

CONSENT AGENDA

A consent agenda item is deemed to be approved unless, at any moment before or during the meeting, a member of the Faculty Council of the Schulich School of Business advises the Chair of his or her request to debate it.

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Upcoming Meeting Dates for 2021-2022:

Schulich Faculty Council:

Friday, May 27, 2022

FACULTY COUNCIL SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Schulich Faculty Council for the 2021-22 academic year will be held remotely via Zoom on **Friday May 27, 2022** from **11:30am - 1:00pm**.

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1. Welcome and Chair's Remarks (5 minutes)	
2. Dean's Remarks (Recording) (15 minutes)	
3. PhD/GBC/UBS Updates (10 minutes)	
4. Changes to Career Development Services (<i>H. Sinker</i>) (20 minutes)	
5. Update on Dean's Retreat on Equity, Diversity, and Inclusion (<i>M. Machado</i>) (20 minutes)	4-8
6. Discussion: Revised SSB Guidelines for Promotion to Associate Professor- Teaching Stream (<i>M. Levesque</i>)	9-22
7. Other Business	
8. Motion: Establishment of Summer Authority for the Executive Committee	
9. Adjournment	

CONSENT AGENDA

A consent agenda item is deemed to be approved unless, at any moment before or during the meeting, a member of the Faculty Council of the Schulich School of Business advises the chair of their request to debate it.

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APPENDIX 'A': POST-RETREAT PROPOSED GO-FORWARD EDI STRATEGY

Held on Tuesday March 29, 2022

The Next Steps on the SSB EDI Journey

	INITIATIVE	DELIVERABLES	TIMELINE
1.	eCampus Ontario	Online Course – Fostering the spirit of Black Youth Entrepreneurship. Open access to all post-secondary institutions in Ontario	Spring 2022
2.	EDI Website	To contain School's Mission and Vision (*) on EDI, current initiatives and EDI-related resources	Spring 2022
3.	Reporting incidents of exclusion	Launch process for reporting incidents of exclusions and making the link to performance reviews more visible to students	Summer 2022
4.	Build Repository of Diverse Case Studies	As a starting point, collect a range of 15-20 articles or business case studies that are diverse, representative of Black and Indigenous populations and other equity-seeking communities and that can be used in the classroom as a point of discussion.	Fall 2022
5.	Schulich community consultation	EDI-survey launch to wider Schulich community to increase engagement and gain diverse perspectives on EDI-related issues	Fall 2022
6.	EDI-Literacy Training	Launch EDI webinar training series (in collaboration with CITE and SCTE) across the SSB community to increase the chances for students and other SSB community members to achieve social mobility, and economic and career success through topics such as: <ul style="list-style-type: none">• Active Bystander Training; Unconscious bias; Microaggressions; Intersectionality; Allyship; Anti-racism, and; Cultural awareness.	Fall 2022/Winter 2023

7.	Decolonization of curriculum**	The launch of a new MBA specialization with the working title: “Leading Equitable, Diverse and Inclusive Organizations”	Fall 2022
		Launch of EDI-learning outcomes in new course proposal forms	Fall 2022
		Launch of EDI-learning outcomes in new program proposal forms	Winter 2023
		Refresh existing Schulich programs to embed EDI-learning outcomes that ensures the representation of historically under-represented communities, views and approaches	Fall 2023/2024
8.	Indigenization of curriculum**	Every core course across all Schulich programs to have one module on indigenous business issues, to make clear to learners that European colonialism does not offer a unique but only one of many ways to create value	Fall 2023/2024
9.	Open Enrollment programs	Collaborate with Schulich Faculty and SEEC to develop up to 3 open enrollment programs which enable greater access to the School and its programs for Indigenous, Black and other equity-seeking communities that were historically excluded from a quality business education.	Fall 2023/Winter 2024
10.	Community partnership building	Engage with high school students through SBEA, Tri-School initiatives, and develop a speakers bureau (in collaboration with the Professional Development and Experiential Education Office) that consists of a diverse community upon which Schulich is able to draw upon to bring different perspectives to a business classroom.	Ongoing
11.	Admissions	Continuous review of student admissions criteria to reflect the SSB cultures of excellence and inclusion in business education and research.	Ongoing
12.	Faculty Recruitment	Continuous review of the faculty recruitment process to reflect the SSB cultures of excellence and inclusion in business education and research.	Ongoing

13.	Research and Thought Leadership	Develop research and thought leadership to support the EDI journey of corporate communities in Canada and globally.	Ongoing
14.	Monitor and review EDI strategy	Regular review and monitoring of current EDI strategy based on feedback from Schulich community consultations, CEC, engagement with community partners.	Ongoing

***PROPOSED MISSION**

- The Schulich School of Business strives to foster an equitable and inclusive environment within its teaching, learning and research practices. The aim is to operationalize better outcomes for socially responsible leaders, and to leverage diversity to drive innovation in today's multicultural and global environments.

***PROPOSED VISION**

- To create a positive impact on the business world by promoting greater access to quality business education, a stronger sense of belonging, and improved student success, particularly for equity-seeking communities.

****Examples of Strategies for Equity, Diversity, Inclusion, Decolonization and Indigenization Action Plan**

- Ensuring that the course readings are authored by diverse authors (for example in respect to race and gender) and that materials (e.g., case studies) feature diverse workers and leaders.
- Slides and other presentation materials include images featuring diverse workforce.
- Use different pronouns (e.g., there is a tendency that workers and leaders are usually referred to as "he" – try using "she" and "they" instead).
- Use ethnically different names for protagonist featured in assignments and other course materials.
- If using group work, consider random assignments to groups (as opposed allowing students to pick their own group members) to avoid some students being left out by other students due to their demographics and background.
- Consider adding land acknowledgment to your classes and slides.
- Consider portraying and discussing (if applicable) variety of diversity demographics including gender, race, sexual orientation, disability, religion, socioeconomic background, language diversity, etc.

- If bringing speakers to your class, ensure that speakers are diverse and come from various backgrounds.
- Ensure that everyone has an opportunity to speak in the class and feels safe to do so by creating a supportive class environment where different perspectives are valued and encouraged.

Some broad guiding recommendations to help ensure course content, materials, lessons, and delivery support EDI and anti-racism.

1. Consider the authorship of course materials and resources, as well as who is invited to speak as an authority in the classroom (e.g. guest speakers) – who is included? Who is excluded? Which lenses and perspectives are represented, and which are not?
 - a. Explicitly include Indigenous frameworks, lenses, and voices (e.g. TRC is listed in course topics, but no evidence of Indigenous voices; what about Indigenous perspectives on families, mental health, etc.?)
 - b. Explicitly include anti-black-racism frameworks, lenses, and voices
 - c. Explicitly include Critical Disability Studies frameworks, lenses, and voices
2. In each course, what implicit assumptions are being made about:
 - a. Who are the clients/patients? (e.g. women & mothers: could this language be more nuanced and trans-inclusive? (Families & Social Groups))
 - b. Who are the caregivers? (e.g. where is there overlap between practicing clinicians and equity seeking groups, and how does that play out in the context of care?)
 - c. Who has expertise/power? Who takes action and who is passive? Who gets believed, and what parts of their words are believed?
 - d. What/who is normal or standard? (e.g. does every patient require the same procedural steps in care, and how best to navigate discretionary decision-making where discrimination might occur?)
3. In each course, show how you not only teach EDI as content, but also actively practice and model it as well. For example, in outlining your approach to course design in the course proposal form, can you explicitly connect your strategies and rationale to a commitment to practicing EDI in the classroom? When you discuss course content, assessments, and learning outcomes, can

you draw connections to Universal Design for Learning as an equity-oriented practice? In short, what's the EDI rationale behind outcomes, activities, assessments, course design, pedagogies? (For example, if relying on group projects for assessments, consider referencing (in the course proposal) use of community agreements or other strategies that support EDI for students and faculty)

4. Reference how the department/faculty/university will support instructors in implementing EE, TEL, UDL specifically in these equity-oriented courses. Part of this can be ongoing or future consultations with LTS, Teaching Commons, and other available supports.
5. Consider possible course learning outcomes related to UN-learning/ RE-learning (e.g. in critically engaging with and reflecting on course content, some students may need space for unpacking existing ways of thinking as well as for exploring new ways of thinking).
6. How and where will students see themselves and their lived experiences in this course/content? With this in mind, where are the safe/brave spaces for having these conversations and how will students be protected and supported in these courses?

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Moren Lévesque, Chair of T&P Committee
Date: May 12, 2022
Re: Revised SSB Guidelines for Promotion to Associate Professor – Teaching Stream

Motion:

Request that Faculty Council approve the revised SSB Guidelines for Promotion to Associate Professor – Teaching Stream.

Rationale:

Professor Susan Ehrlich, Chair, Senate Committee on Tenure and Promotion, requested on May 10th, 2022, that the SSB unit-level standards for Promotion to Associate Professor (Teaching Stream) be revised based on suggestions from the Senate Committee on Tenure and Promotions Panel (henceforth, ‘Panel’). Hence, the SSB T&P Committee did the following revisions:

- On page 2, we have made some of the criteria/activities under the category “*Evidence of Excellence in Teaching*” more important than others, including teaching evaluations, as recommended by the Panel.
- On pages 2-3, we now more clearly differentiate the bullets under the category “*Evidence of Innovation in Teaching and Learning*” and the category “*Evidence of Creative Educational Leadership and/or Achievement*” by specifying that the former category focuses on evidence that pertains to contributions primarily within the Area or the School, whereas the latter category focuses on evidence that pertains primarily to broader contributions at the University and Collegium levels.
- As also highlighted by the Panel, owing to high expectation on the teaching load for the Teaching Stream, the unit-level standards now require that a candidate achieves at least “Competence” in Service (as opposed to “High Competence”).
- On pages 3-4, we have added criteria for “Competence” in Service and revised those for “High Competence”, following a suggestion from the Panel emphasizing that the criteria for “High Competence” seemed rather low and thus “Competence” more appropriately reflects our intention.

Enclosed is the version last approved by SSB Faculty Council in September 2021 with track changes to see all the edits, as well as a version where these edits have all been accepted.

York University's Schulich School of Business
Criteria for Tenure & Promotion to Associate Professor under the Teaching Stream
(version September 9th, 2021; revised May 11th, 2022)

The following is a statement of the criteria and procedures adopted within York's Schulich School of Business (SSB) for tenure and promotion to Associate Professor under the Teaching Stream.

Background

The SSB Tenure and Promotion Committee—the administrative body that drafted this document—was guided by Senate's views and principles. In some cases where a particular item, suggestion, or requirement was unclear, vague, or subject to interpretation, we offered suggestions. But for the most part those situations were quite rare, and we must emphasize that the criteria were set outside the faculty and then adapted to the SSB context. Therefore, we begin by quoting directly from the Senate Teaching Stream Document (amended June 2019, sections A and B.1.2):

The University's need for specialized teaching skills in certain areas is the *raison d'être* of the Teaching Stream, and thus the consequent emphasis on teaching therein is reflected in the criteria for evaluating members of the stream. Indeed, this need is the basis for requiring that **nothing less than excellence (superiority) in teaching and competence in service** to the University be the required standard for the granting of tenure to an individual in the stream.

Since the Teaching Stream sets up a career orientation that is substantially different from that of the Professorial Stream, this document does not foresee the possibility of transfers or joint appointments between the streams. In those cases where qualifications and aspirations change, movement across the streams would, of course, be possible on the basis of a new appointment in competition with other qualified applicants. It must be stressed, however, that neither stream can be permitted to be a holding place for the other. The use of the Teaching Stream as a staging ground for individuals to attempt to become qualified for the Professorial Stream would be antithetical to the spirit of this document and, indeed, would undermine the very integrity of the Teaching Stream that this document wishes to promote.

An Associate Professor, Teaching Stream is a superior teacher who has also demonstrated a competent level of service to the University that one would expect from a colleague in whose hands the care of the University has been placed by the granting of tenure. It is because of this trust and because of its desire to give instruction of the highest quality that the University establishes a minimal threshold over which individuals in the Teaching Stream must pass to become part of that trust. In recognition of attainment of a level of distinction as a superior teacher whom it wishes to retain, the University grants a promotion to the rank of Associate Professor, Teaching Stream with tenure. **It is expected that the Associate Professor, Teaching Stream will maintain, enhance and perhaps broaden his/her capabilities as a teacher over time.** As a tenured member of the faculty of York University, an Associate Professor, Teaching Stream is governed by the general rules of the University relating to tenured faculty.

With this preamble and guidance in mind, we note that teaching at the SSB—or anywhere else for that matter—revolves around challenging students with new ideas and perspectives. This enables students to develop critical judgement skills, as well as adopting a caring and engaging approach that is attuned to student needs and capacities, while encouraging innovation and inventiveness. The teaching load expectation for the Teaching Stream is **7 single-semester course equivalents per year** (or 3.5 University's full course equivalents per year) and is allocated based on the candidate's subject matter expertise.

Teaching Stream faculty are expected to enhance and grow a vibrant teaching culture, be leaders, innovators, mentors, relationship builders, as well as stay current with a field's scholarship and knowledge, particularly as it pertains to scholarship and knowledge that advances teaching and learning in the field. Therefore, the creation of new and innovative teaching-focused or learning-focused research will be valued and help a candidate's file. Moreover, a candidate in the Teaching Stream must publish their pedagogical research, or other relevant research in the candidate's area of expertise, although expectations for the extent of publishing in and of itself are lower than those in the Professorial Stream. Teaching Stream faculty are also expected to enhance the reputation of the School and the University, as centers of teaching excellence. Our view is that Teaching Stream faculty must demonstrate **Excellence in teaching as well as High and Competence in service.**

1. Teaching Criteria

A recommendation of Excellence in teaching will require evidence of *Excellence in Teaching, Innovative Teaching and Learning, and Creative Educational Leadership and/or Achievement*. The evidence that may be used to demonstrate excellence in each of these three areas are a combination of the following:

Evidence of Excellence in Teaching

- Ratings on course evaluations.
- Student letters.
- ~~Personal skill development and upgrading that is translated into classroom teaching.~~
- ~~Ratings on course evaluations.~~
- ~~Student letters.~~
- Classroom visitation letters, from arms-length faculty referees.
- Translate p~~Personal skill development and upgrading that is translated into classroom teaching.~~
- Development and application of an evidence-informed approach in the design of learning activities, assignments, courses, or curriculum that promote student learning.
- Integrating research (pedagogical or otherwise) and/or scholarship into teaching practice and curriculum.
- Recognition of teaching through nomination for, or receipt of, awards/honors.
- ~~Use of professional expertise and experience to deepen student understanding and enrich the application of theory.~~

Although the following activities will also be considered, their weighing will be less extensive:

- Use of professional expertise and experience to deepen student understanding and enrich the application of theory.
- Coordination and/or management of courses and/or teaching assistants that positively impact student learning experience.
- Supervision of undergraduate and/or graduate students, as evidenced by undertaking independent studies, serving as mentors, coaching case competitions, or other activities such as research projects.
- ~~Recognition of teaching through nomination for, or receipt of, awards/honors.~~

Evidence of Innovation in Teaching and Learning

This evidence pertains to contributions primarily within ~~For the Area or the School:~~

- Development of new courses/curricula or reform of courses/curricula.
- Innovations in the teaching domain, including the creation of new, innovative, and exemplary teaching processes, materials, tools, or forms of assessment.
- Development of unique learning experiences for students (e.g., career or community-engaged learning opportunities).
- Contribution to the technological enrichment of teaching and/or courses (e.g., development or creative application of effective new technologies or media).
- Leveraging of grants/funds to support development and implementation of pedagogical initiatives, or to support other relevant research in the candidate's area of expertise.
- Conducting pilots of new teaching methods or curricular content.
- Creation of new initiatives to support teaching and/or learning.
- Development and updating of professional skills, certifications, and/or designations relevant to the teaching and professional development of students.

Evidence of Creative Educational Leadership and/or Achievement

This evidence pertains primarily to broader contributions at ~~For the University and the Collegium~~ levels:

- Contributions to pedagogical development or pedagogical innovation in business/management or in a broader educational context, such as:
 - Introduction of new pedagogical techniques.
 - Development of educational materials (e.g., textbooks, teaching guides).
 - Production of technological tools or multi-media resources that enrich teaching and learning.
 - Invitations to serve as curriculum or program evaluator for another academic unit or institution.
- Oversight of new initiatives to support teaching and/or learning.
- Spread knowledge on teaching and/or learning through blogging, video channels, or other non-traditional forms of knowledge dissemination.
- Engagement in the professional development of others such as:
 - Delivering workshops, seminars, or presentations on teaching and learning.
 - Serving as a teaching mentor to colleagues.
 - Providing mentorship and establishing best practices in the management and leadership of teaching assistants and instructional team members.
- Engagement with initiatives that attempt to measure the effect of different teaching pedagogies, such as conducting research on teaching and/or learning with potential impact beyond a single classroom.
- Publication and dissemination of one's own pedagogical research, or other relevant research in the candidate's area of expertise (e.g., through scholarly articles or educational resources, presentations at conferences, workshops, etc.).

2. Service Criteria

A candidate's service will be evaluated in terms of their involvement in School, University, and Area committees and initiatives. The latter might also include contribution to recruiting efforts. Consideration will also be given to service to the community at large.

Criteria for Competence in Service

A rating of Competence will be warranted when the candidate has performed the required service for the SSB, as documented in letters of reference from Chairs of committees on which the candidate has served. A rating of Competence requires service on one or more committees or subcommittees a year and evidence

of active, high-quality involvement and participation as indicated by letters from the Chair of the committees. Service that extends beyond committee participation would also contribute to a rating of Competence. Such service might include, but is not limited to, the following:

- Service on a task force or special assignment.
- Service as an Affirmative Action Representative for a designated Area.
- Managing individual programs at the SSB.
- Involvement with students' extracurricular activities related to business/management.
- Assisting colleagues or other University constituents beyond the normal expectations of collegiality.
- Significant engagement in outreach activities and work with community organizations.
- Engagement in professional teaching and related organizations/associations/centers (and the application of this knowledge to teaching and the curriculum in the School or beyond), such as:
 - Serving as a journal reviewer or editor of a pedagogical publication or as a proposal referee for pedagogical conferences.
 - Serving in a leadership role in professional teaching and learning organizations/associations, or business or government organizations.
- Organization of conferences/symposia focused on teaching and learning.
- Other activities that contribute to the overall welfare or enhancement of the School or University.

The candidate should have performed any Area service expected at that stage, as would be described by a positive letter of reference from the current Area Coordinator, or the relevant Area Coordinator when the bulk of the work was done.

Criteria for High Competence in Service

A rating of High Competence will be awarded when the candidate has performed more than the required service for the SSB, as documented in letters of reference from Chairs of committees on which the candidate has served. A rating of High Competence requires:

- Service on at least three committees/subcommittees per year.
- Evidence of highly active, high-quality involvement and participation.
- Significant service that extends beyond committee participation including, but not limited to, at least three of the bullet points considered for a rating of Competence.

Again, the candidate should have performed any Area service expected at that stage, as would be described by a positive letter of reference from the current Area Coordinator, or the relevant Area Coordinator ~~when~~where the bulk of the work was done.

- ~~A rating of High Competence will be warranted when the candidate has performed the required service for the SSB, as documented in letters of reference from Chairs of committees on which the candidate has served. A rating of High Competence requires service on one or more committees or subcommittees a year and evidence of active, high-quality involvement and participation as indicated by letters from the Chair of the committees. Service that extends beyond committee participation would also contribute to a rating of high competence. Such service might include, but is not limited to, the following:~~

- ~~Service on a task force or special assignment.~~
- ~~Service as an Affirmative Action Representative for a designated Area.~~
- ~~Managing individual programs at the SSB.~~
- ~~Involvement with students' extracurricular activities related to business/management.~~
- ~~Assisting colleagues or other University constituents beyond the normal expectations of collegiality.~~
- ~~Significant engagement in outreach activities and work with community organizations.~~

- ~~Engagement in professional teaching and related organizations/associations/centers (and the application of this knowledge to teaching and the curriculum in the School or beyond), such as:~~
 - ~~Serving as a journal reviewer or editor of a pedagogical publication or as a proposal referee for pedagogical conferences.~~
 - ~~Serving in a leadership role in professional teaching and learning organizations/associations, or business or government organizations.~~
- ~~Organization of conferences/symposia focused on teaching and learning.~~
- ~~Other activities that contribute to the overall welfare or enhancement of the School or University.~~

~~The candidate should have performed any Area service expected at that stage, as would be described by a positive letter of reference from the current Area Coordinator, or the relevant Area Coordinator when the bulk of the work was done.~~

Criteria for Excellence in Service

A rating of Excellence may be awarded if a case can be made that the candidate has provided exceptional service to their Area, School, and/or University, which might include a combination of any of the following:

- Service on multiple committees per year.
- Evidence of leadership in committee service or service to the Area, School, or University.
- Significant contributions to the welfare of the School or University as evidenced by letters or awards.
- Responsibility for, and unusually high achievement in, a major service undertaking for the School or University.

3. Procedures

Procedures for preparing the tenure and/or promotion file of a candidate in the Teaching Stream are also governed by the University's policies.

For Documenting Teaching

The candidate must:

- Name one full-time tenured faculty member on the File Preparation Committee (FPC).
- Submit their up-to-date CV, which should also include activities that might be considered part of research and professional contribution (e.g., research supervision with undergraduate and/or graduate students).
- Provide the FPC with the following information:
 - A teaching dossier—refer to *Teaching Dossier* below.
 - All course evaluations—refer to *Course Evaluations* below.
 - Name a faculty member referee to assess their teaching—refer to *Letters of Appraisal* below.
 - Names of students (undergraduate and/or graduate) they want to be solicited for letters and not to exceed one-third of the list of all students solicited—refer to *Letters from Students* below.
 - A copy of all published research.

We also encourage the candidate to submit a brief summary statement outlining their teaching, research, and service accomplishments.

The FPC will assist in collecting course evaluations, solicit letters of appraisal from referees, and solicit letters from students. The FPC will also solicit a letter from the candidate's current Area Coordinator, or the Area Coordinator in place when the bulk of the candidate's teaching was done for the Area, who can best put into perspective the candidate's contribution to their respective Area.

Teaching Dossier

The candidate is required to submit a teaching dossier which will be included in the tenure and promotion file and sent to referees. The teaching dossier should include:

- A video of them teaching a class, the filming of which will be the responsibility of the candidate.
- A statement of teaching philosophy that details how particular pedagogical approaches/strategies are addressing the candidate's goals.
- A list of courses taught, which may take the form of a table and should include the course code, name, level, and number of students taught.
- Representative course outlines and materials, reading lists, assignments, etc.
- A statement about the course evaluations that reflects on how the candidate has responded to student feedback in relation to course design, teaching approaches, etc.
- A description of any course/curriculum development efforts and/or plans (e.g., the revision of existing courses or the development of new courses).
- If the candidate has engaged in research supervision, which traditionally might be classified as professional contribution, the candidate can make the case that this enhances their teaching and should be added to the dossier.

Course Evaluations

Summary reports for all courses taught by the candidate since their initial appointment at York or another University must be provided. The reports should include quantitative data for all questions, with comparative Area- and School-level data. Student comments included in tenure and/or promotion files will indicate from which courses they were drawn, will be presented to the candidate in their entirety, but without contextual identifiers and student signatures.

Letters of Appraisal

The FPC will solicit at least four letters of appraisal (including one referee selected by the candidate). All referees must be tenured/continuing faculty members with competency to assess whether the candidate's work demonstrates Excellence in teaching. Referees need not be in a Teaching Stream appointment themselves, but they must have a record of demonstrated excellence in teaching (e.g., teaching awards), extensive experience in evaluating teaching (e.g., in their capacity as department chairs/undergraduate directors/program reviewers), be demonstrated leaders in teaching or course/program development, and/or have long-standing experience teaching many of the same courses as the candidate. Referees must evaluate the content of a candidate's classroom teaching or a video recording of such. All referees must be external to the SSB or at other institutions with excellent undergraduate and master's programs. At least two referees must be external to York, but in Business/Management Schools. The referees within York must be members of Schools or Departments of Administrative Studies, Economics, Sociology, Psychology, or Philosophy, or some other department or faculty that is relevant to the area being taught. All referees must be at "arm's length" from the candidate. Quoting from the Senate T&P Policies, Criteria and Procedures (amended 25 June 2020, section F.3.1.3):

Referees are not at “arm’s length” if the candidate has had a prior professional involvement with them (e.g., as thesis supervisor, co-author, close colleague within the field, etc.) or has had a significant personal relationship with them.

Letters from Students

A random sample of undergraduate and graduate students most recently taught by the candidate should be solicited for feedback, to be addressed, in writing, to the Chair of the FPC. The candidate may add additional names to comprise up to one-third of the students solicited. Letters may take the form of emails, be sent electronically, or received in hard copy. Students should specifically be asked to comment on:

- The candidate’s ability to stimulate and challenge their intellectual curiosity.
- The candidate’s ability to create an environment that was conducive to their learning (as evidenced by the in-class experience, assessments, and other course materials).
- Any out-of-class activities that contributed to their learning.
- Where appropriate, the candidate’s effectiveness as a supervisor of undergraduate or graduate student research.

For Documenting Service

The candidate must:

- Provide any material they believe is relevant and that should be sent to referees.
- Name two potential referees internal to York to assess their service.

The FPC will select two additional referees internal to York to assess the candidate’s service and will solicit a minimum of three, but a maximum of four, letters to be included in the file. In addition, the FPC will request a letter of reference from the Area Coordinator, or the Area Coordinator in place when the bulk of the candidate’s service was done for the Area, who will assess the candidate’s performance regarding expected Area service.

4. Final Remarks

The teaching/service criteria and procedures stated above are those adopted within the SSB for tenure and promotion to Associate Professor under the Teaching Stream. Since this Stream is new to the SSB, these criteria and procedures will be revised on a needed basis as the SSB gains more experience with this Stream.

York University's Schulich School of Business
Criteria for Tenure & Promotion to Associate Professor under the Teaching Stream
(version September 9th, 2021; revised May 11th, 2022)

The following is a statement of the criteria and procedures adopted within York's Schulich School of Business (SSB) for tenure and promotion to Associate Professor under the Teaching Stream.

Background

The SSB Tenure and Promotion Committee—the administrative body that drafted this document—was guided by Senate's views and principles. In some cases where a particular item, suggestion, or requirement was unclear, vague, or subject to interpretation, we offered suggestions. But for the most part those situations were quite rare, and we must emphasize that the criteria were set outside the faculty and then adapted to the SSB context. Therefore, we begin by quoting directly from the Senate Teaching Stream Document (amended June 2019, sections A and B.1.2):

The University's need for specialized teaching skills in certain areas is the *raison d'être* of the Teaching Stream, and thus the consequent emphasis on teaching therein is reflected in the criteria for evaluating members of the stream. Indeed, this need is the basis for requiring that **nothing less than excellence (superiority) in teaching and competence in service** to the University be the required standard for the granting of tenure to an individual in the stream.

Since the Teaching Stream sets up a career orientation that is substantially different from that of the Professorial Stream, this document does not foresee the possibility of transfers or joint appointments between the streams. In those cases where qualifications and aspirations change, movement across the streams would, of course, be possible on the basis of a new appointment in competition with other qualified applicants. It must be stressed, however, that neither stream can be permitted to be a holding place for the other. The use of the Teaching Stream as a staging ground for individuals to attempt to become qualified for the Professorial Stream would be antithetical to the spirit of this document and, indeed, would undermine the very integrity of the Teaching Stream that this document wishes to promote.

An Associate Professor, Teaching Stream is a superior teacher who has also demonstrated a competent level of service to the University that one would expect from a colleague in whose hands the care of the University has been placed by the granting of tenure. It is because of this trust and because of its desire to give instruction of the highest quality that the University establishes a minimal threshold over which individuals in the Teaching Stream must pass to become part of that trust. In recognition of attainment of a level of distinction as a superior teacher whom it wishes to retain, the University grants a promotion to the rank of Associate Professor, Teaching Stream with tenure. **It is expected that the Associate Professor, Teaching Stream will maintain, enhance and perhaps broaden his/her capabilities as a teacher over time.** As a tenured member of the faculty of York University, an Associate Professor, Teaching Stream is governed by the general rules of the University relating to tenured faculty.

With this preamble and guidance in mind, we note that teaching at the SSB—or anywhere else for that matter—revolves around challenging students with new ideas and perspectives. This enables students to develop critical judgement skills, as well as adopting a caring and engaging approach that is attuned to student needs and capacities, while encouraging innovation and inventiveness. The teaching load expectation for the Teaching Stream is **7 single-semester course equivalents per year** (or 3.5 University's full course equivalents per year) and is allocated based on the candidate's subject matter expertise.

Teaching Stream faculty are expected to enhance and grow a vibrant teaching culture, be leaders, innovators, mentors, relationship builders, as well as stay current with a field's scholarship and knowledge, particularly as it pertains to scholarship and knowledge that advances teaching and learning in the field. Therefore, the creation of new and innovative teaching-focused or learning-focused research will be valued and help a candidate's file. Moreover, a candidate in the Teaching Stream must publish their pedagogical research, or other relevant research in the candidate's area of expertise, although expectations for the extent of publishing in and of itself are lower than those in the Professorial Stream. Teaching Stream faculty are also expected to enhance the reputation of the School and the University, as centers of teaching excellence. Our view is that Teaching Stream faculty must demonstrate **Excellence in teaching and Competence in service**.

1. Teaching Criteria

A recommendation of Excellence in teaching will require evidence of *Excellence in Teaching, Innovative Teaching and Learning*, and *Creative Educational Leadership and/or Achievement*. The evidence that may be used to demonstrate excellence in each of these three areas are a combination of the following:

Evidence of Excellence in Teaching

- Ratings on course evaluations.
- Student letters.
- Classroom visitation letters, from arms-length faculty referees.
- Translate personal skill development and upgrading into classroom teaching.
- Development and application of an evidence-informed approach in the design of learning activities, assignments, courses, or curriculum that promote student learning.
- Integrating research (pedagogical or otherwise) and/or scholarship into teaching practice and curriculum.
- Recognition of teaching through nomination for, or receipt of, awards/honors.

Although the following activities will also be considered, their weighing will be less extensive:

- Use of professional expertise and experience to deepen student understanding and enrich the application of theory.
- Coordination and/or management of courses and/or teaching assistants that positively impact student learning experience.
- Supervision of undergraduate and/or graduate students, as evidenced by undertaking independent studies, serving as mentors, coaching case competitions, or other activities such as research projects.

Evidence of Innovation in Teaching and Learning

This evidence pertains to contributions primarily within the Area or the School:

- Development of new courses/curricula or reform of courses/curricula.
- Innovations in the teaching domain, including the creation of new, innovative, and exemplary teaching processes, materials, tools, or forms of assessment.
- Development of unique learning experiences for students (e.g., career or community-engaged learning opportunities).
- Contribution to the technological enrichment of teaching and/or courses (e.g., development or creative application of effective new technologies or media).
- Leveraging of grants/funds to support development and implementation of pedagogical initiatives, or to support other relevant research in the candidate's area of expertise.

- Conducting pilots of new teaching methods or curricular content.
- Creation of new initiatives to support teaching and/or learning.
- Development and updating of professional skills, certifications, and/or designations relevant to the teaching and professional development of students.

Evidence of Creative Educational Leadership and/or Achievement

This evidence pertains primarily to broader contributions at the University and Collegium levels:

- Contributions to pedagogical development or pedagogical innovation in business/management or in a broader educational context, such as:
 - Introduction of new pedagogical techniques.
 - Development of educational materials (e.g., textbooks, teaching guides).
 - Production of technological tools or multi-media resources that enrich teaching and learning.
 - Invitations to serve as curriculum or program evaluator for another academic unit or institution.
- Oversight of new initiatives to support teaching and/or learning.
- Spread knowledge on teaching and/or learning through blogging, video channels, or other non-traditional forms of knowledge dissemination.
- Engagement in the professional development of others such as:
 - Delivering workshops, seminars, or presentations on teaching and learning.
 - Serving as a teaching mentor to colleagues.
 - Providing mentorship and establishing best practices in the management and leadership of teaching assistants and instructional team members.
- Engagement with initiatives that attempt to measure the effect of different teaching pedagogies, such as conducting research on teaching and/or learning with potential impact beyond a single classroom.
- Publication and dissemination of one's own pedagogical research, or other relevant research in the candidate's area of expertise (e.g., through scholarly articles or educational resources, presentations at conferences, workshops, etc.).

2. Service Criteria

A candidate's service will be evaluated in terms of their involvement in School, University, and Area committees and initiatives. The latter might also include contribution to recruiting efforts. Consideration will also be given to service to the community at large.

Criteria for Competence in Service

A rating of Competence will be warranted when the candidate has performed the required service for the SSB, as documented in letters of reference from Chairs of committees on which the candidate has served. A rating of Competence requires service on one or more committees or subcommittees a year and evidence of active, high-quality involvement and participation as indicated by letters from the Chair of the committees. Service that extends beyond committee participation would also contribute to a rating of Competence. Such service might include, but is not limited to, the following:

- Service on a task force or special assignment.
- Service as an Affirmative Action Representative for a designated Area.
- Managing individual programs at the SSB.
- Involvement with students' extracurricular activities related to business/management.
- Assisting colleagues or other University constituents beyond the normal expectations of collegiality.

- Significant engagement in outreach activities and work with community organizations.
- Engagement in professional teaching and related organizations/associations/centers (and the application of this knowledge to teaching and the curriculum in the School or beyond), such as:
 - Serving as a journal reviewer or editor of a pedagogical publication or as a proposal referee for pedagogical conferences.
 - Serving in a leadership role in professional teaching and learning organizations/associations, or business or government organizations.
- Organization of conferences/symposia focused on teaching and learning.
- Other activities that contribute to the overall welfare or enhancement of the School or University.

The candidate should have performed any Area service expected at that stage, as would be described by a positive letter of reference from the current Area Coordinator, or the relevant Area Coordinator when the bulk of the work was done.

Criteria for High Competence in Service

A rating of High Competence will be awarded when the candidate has performed more than the required service for the SSB, as documented in letters of reference from Chairs of committees on which the candidate has served. A rating of High Competence requires:

- Service on at least three committees/subcommittees per year.
- Evidence of highly active, high-quality involvement and participation.
- Significant service that extends beyond committee participation including, but not limited to, at least three of the bullet points considered for a rating of Competence.

Again, the candidate should have performed any Area service expected at that stage, as would be described by a positive letter of reference from the current Area Coordinator, or the relevant Area Coordinator where the bulk of the work was done.

Criteria for Excellence in Service

A rating of Excellence may be awarded if a case can be made that the candidate has provided exceptional service to their Area, School, and/or University, which might include a combination of any of the following:

- Service on multiple committees per year.
- Evidence of leadership in committee service or service to the Area, School, or University.
- Significant contributions to the welfare of the School or University as evidenced by letters or awards.
- Responsibility for, and unusually high achievement in, a major service undertaking for the School or University.

3. Procedures

Procedures for preparing the tenure and/or promotion file of a candidate in the Teaching Stream are also governed by the University's policies.

For Documenting Teaching

The candidate must:

- Name one full-time tenured faculty member on the File Preparation Committee (FPC).
- Submit their up-to-date CV, which should also include activities that might be considered part of research and professional contribution (e.g., research supervision with undergraduate and/or graduate students).
- Provide the FPC with the following information:
 - A teaching dossier—refer to *Teaching Dossier* below.
 - All course evaluations—refer to *Course Evaluations* below.
 - Name a faculty member referee to assess their teaching—refer to *Letters of Appraisal* below.
 - Names of students (undergraduate and/or graduate) they want to be solicited for letters and not to exceed one-third of the list of all students solicited—refer to *Letters from Students* below.
 - A copy of all published research.

We also encourage the candidate to submit a brief summary statement outlining their teaching, research, and service accomplishments.

The FPC will assist in collecting course evaluations, solicit letters of appraisal from referees, and solicit letters from students. The FPC will also solicit a letter from the candidate's current Area Coordinator, or the Area Coordinator in place when the bulk of the candidate's teaching was done for the Area, who can best put into perspective the candidate's contribution to their respective Area.

Teaching Dossier

The candidate is required to submit a teaching dossier which will be included in the tenure and promotion file and sent to referees. The teaching dossier should include:

- A video of them teaching a class, the filming of which will be the responsibility of the candidate.
- A statement of teaching philosophy that details how particular pedagogical approaches/strategies are addressing the candidate's goals.
- A list of courses taught, which may take the form of a table and should include the course code, name, level, and number of students taught.
- Representative course outlines and materials, reading lists, assignments, etc.
- A statement about the course evaluations that reflects on how the candidate has responded to student feedback in relation to course design, teaching approaches, etc.
- A description of any course/curriculum development efforts and/or plans (e.g., the revision of existing courses or the development of new courses).
- If the candidate has engaged in research supervision, which traditionally might be classified as professional contribution, the candidate can make the case that this enhances their teaching and should be added to the dossier.

Course Evaluations

Summary reports for all courses taught by the candidate since their initial appointment at York or another University must be provided. The reports should include quantitative data for all questions, with comparative Area- and School-level data. Student comments included in tenure and/or promotion files will indicate from which courses they were drawn, will be presented to the candidate in their entirety, but without contextual identifiers and student signatures.

Letters of Appraisal

The FPC will solicit at least four letters of appraisal (including one referee selected by the candidate). All referees must be tenured/continuing faculty members with competency to assess whether the candidate's

work demonstrates Excellence in teaching. Referees need not be in a Teaching Stream appointment themselves, but they must have a record of demonstrated excellence in teaching (e.g., teaching awards), extensive experience in evaluating teaching (e.g., in their capacity as department chairs/undergraduate directors/program reviewers), be demonstrated leaders in teaching or course/program development, and/or have long-standing experience teaching many of the same courses as the candidate. Referees must evaluate the content of a candidate's classroom teaching or a video recording of such. All referees must be external to the SSB or at other institutions with excellent undergraduate and master's programs. At least two referees must be external to York, but in Business/Management Schools. The referees within York must be members of Schools or Departments of Administrative Studies, Economics, Sociology, Psychology, or Philosophy, or some other department or faculty that is relevant to the area being taught. All referees must be at "arm's length" from the candidate. Quoting from the Senate T&P Policies, Criteria and Procedures (amended 25 June 2020, section F.3.1.3):

Referees are not at "arm's length" if the candidate has had a prior professional involvement with them (e.g., as thesis supervisor, co-author, close colleague within the field, etc.) or has had a significant personal relationship with them.

Letters from Students

A random sample of undergraduate and graduate students most recently taught by the candidate should be solicited for feedback, to be addressed, in writing, to the Chair of the FPC. The candidate may add additional names to comprise up to one-third of the students solicited. Letters may take the form of emails, be sent electronically, or received in hard copy. Students should specifically be asked to comment on:

- The candidate's ability to stimulate and challenge their intellectual curiosity.
- The candidate's ability to create an environment that was conducive to their learning (as evidenced by the in-class experience, assessments, and other course materials).
- Any out-of-class activities that contributed to their learning.
- Where appropriate, the candidate's effectiveness as a supervisor of undergraduate or graduate student research.

For Documenting Service

The candidate must:

- Provide any material they believe is relevant and that should be sent to referees.
- Name two potential referees internal to York to assess their service.

The FPC will select two additional referees internal to York to assess the candidate's service and will solicit a minimum of three, but a maximum of four, letters to be included in the file. In addition, the FPC will request a letter of reference from the Area Coordinator, or the Area Coordinator in place when the bulk of the candidate's service was done for the Area, who will assess the candidate's performance regarding expected Area service.

4. Final Remarks

The teaching/service criteria and procedures stated above are those adopted within the SSB for tenure and promotion to Associate Professor under the Teaching Stream. Since this Stream is new to the SSB, these criteria and procedures will be revised on a needed basis as the SSB gains more experience with this Stream.

The 685th Meeting of Senate held on Thursday, April 28, 2022 via Zoom

Remarks

The Chair, Professor Mario Roy of Glendon College, greeted Senators and gave a special welcome to Professor Poonam Puri, Osgoode Hall Law School, attending her first meeting as Vice-Chair of Senate following her appointment to the position at the March meeting. He acknowledged with sorrow the recent passing of Frances Beer, Professor Emerita of English; Professor Emeritus Hugh Parry, Humanities, who played a role in establishing the University's general education curriculum; Professor Emeritus Wolfgang Ahrens, founding Chair of the Department of Languages, Literatures & Linguistics and a regular member of governance committees at all levels; and University Professor Sydney Eisen, an esteemed colleague, former Dean of the Faculty of Arts, Department Chair and long-serving Senator who significantly influenced the direction of the University in its early decades.

Comments made by President Rhonda Lenton included the following:

- an echoing of the condolences shared by the Chair and an expression of sorrow about the passing of Filomena Ticzon, a long-serving staff member at Schulich
- an update on pandemic matters, including the extension of masking protocol in all indoor spaces on campus until further notice and the approach to the University's pandemic response going forward, and an expression of thanks to Special Advisor for COVID-19 response Professor Parissa Safai and her team for their efforts to safeguard the York community throughout the pandemic
- the federal budget commitment to contribute \$1.5 million in 2022-2023 towards an endowment to support the ongoing activities of the Jean Augustine Chair in Education, Community and Diaspora, held by Professor Carl E. James
- the revised timing of the opening of Markham Campus as a result of pandemic-related construction delays, with implications on programming and the project budget being assessed
- reflections on the preliminary report of the Ontario Auditor General about Laurentian University's decision to seek creditor protection in 2021
- an announcement of the honorary degree recipients to be recognized at the Spring 2022 Convocation Ceremonies

- an acknowledgement of Holocaust Remembrance Day and the National Day of Mourning for those who have lost their lives, suffered injury or illness on the job, or experienced a work-related tragedy

The monthly “Kudos” report on the achievements of members of the York community can be accessed with other documentation for the meeting.

Reports

Academic Colleague to the Council of Ontario Universities (COU)

Speaking to the written report included in the agenda, the Academic Colleague to COU, Senator Brenda Spotton Visano, reported on the February and April COU meetings which focused on community engagement, with a presentation from Victoria Barham, Dean of Science, University of Ottawa, and decolonizing academia, featuring a presentation by York’s own Vice-President Equity, People and Culture Sheila Cote-Meek. A more fulsome update on Vice-President Cote-Meek’s presentation is planned for the May Senate meeting. Academic Colleagues also received updates on a number of sector developments, detailed in Senator Spotton Visano’s written report included in the agenda package.

Facilitated Discussion

Under the auspices of the Executive Committee, a facilitated discussion was held in which Senators’ views were sought on the following question:

What are the key parameters to consider in deciding on the timing to declare the COVID-19 pandemic disruption has ended?

A wide-ranging discussion ensued in which a number of themes surfaced, notably the importance of distinguishing between operational and academic activities when assessing ongoing impacts of the pandemic, the efficacy of the Disruptions Policy to adapt to changing circumstances, and the signal that lifting the disruption may send to the York community. Senators’ input was gratefully received and, along with feedback from Faculty Councils and the University community, will inform future discussions about the appropriate timing and circumstances for lifting the disruption.

Approvals

On the recommendation of its Academic Standards, Curriculum and Pedagogy Committee, Senate approved:

- the establishment of a stream in Communication, Social Media & Public Relations within the BA (Honours) program in Communication and Media Studies, Department of Communication and Media Studies, LA&PS, Markham Campus, effective FW2023-2024
- the establishment of streams in Nursing Practice in High Acuity and Critical Care Settings and Nursing Practice in Mental Health, Illness and Addictions Care within the 4-Year Direct Entry, 2nd Entry and Post-RN IEN BScN programs, School of Nursing, Health, effective FW2022-2023
- changes to the degree requirements for the BA (Honours) programs in Cognitive Science, Department of Philosophy, LA&PS, effective FW2022-2023
- changes to the coursework requirements for the Operations Management & Information Systems Field within the PhD program in Administration, Graduate Studies / Schulich, effective FW2022-2023
- the establishment the *Senate Academic Forgiveness Policy* and the the rescission of the Policy and Guidelines on the Withdrawn from Course Option, the Policy on Course Relief, and the Policy on Repeating Passed or Failed Courses for Academic Credit, effective FW2022-2023
- revisions to the Senate Policy on Visiting Students, Bridging Courses Policy and Guidelines, Regulation on Granting Degree Credit for Pre-University Courses, Regulation on Transfer Credit Limits for Advanced Secondary Studies, to take effect upon implementation of the new grading schemes, with the exception of minor wording changes to the Senate Policy on Visiting Students which will be effective immediately

Committee Information Reports

Executive Committee

The Executive Committee's information items included the following:

- its preliminary discussions about the factors to be considered to identify the timing of ending the disruption to academic activities

- encouragement for Senators to assist in identifying prospective candidates for Senate committees and other positions elected by Senate in response to the recent call for expressions of interest, in particular the Tenure & Promotions Committee
- an update on the status of the Committee's review of the Rules of Senate, with Senate to receive Notice of Motion for the slate of revisions in May
- its receipt of an update on the activities of the Sub-Committee on Equity, including engagement with Faculty Councils and Senate committees to identify opportunities to advance equity objectives in those contexts
- the addition of a candidate to the pool of prospective recipients of honorary degrees

Academic Standards, Curriculum and Pedagogy Committee (ASCP)

ASCP reported that Professor Nicolette Richardson, Health, had been designated to serve as Chair for the remainder of the academic year in the absence of Professor Martin Bunch, Environmental and Urban Change.

ASCP also reported on the following minor changes it had approved effective FW2022-2023 unless otherwise indicated:

AMPD

Degree requirements for the Honours BA Minor program in Computational Arts,
Department of Computational Arts (effective FW2023-2024)

Degree requirements for the BA and Specialized Honours BA and BFA programs in
Theatre, Department of Theatre

AMPD / Lassonde

Degree requirements for the Specialized Honours BA and BA programs in Digital Media,
Department of Computational Arts / Department of Electrical Engineering and
Computer Science

Health

Practicum requirements for the BScN in Nursing program (4-year Direct Entry, 2nd
Entry, Post-RN Internationally Educated Nurses), School of Nursing

Admission requirements for the Certificate in Athletic Therapy, School of Kinesiology
and Health Science

Graduate Studies

Degree requirements for the Master of Science in Management Practice, School of Administrative Studies, LA&PS

Retirement of International Business (IBUS) Specialization within the MBA program, Schulich

Admission requirements within the Operations Management & Information Systems Field within the PhD program in Administration, Schulich

Lassonde

Degree requirements for the BSc and Honours Minor BSc programs, and the Atmospheric Science stream within the Specialized Honours and Honours BSc programs in Earth and Atmospheric Science, Department of Earth and Space Science and Engineering

Establishment of CSSD rubric for the BAsC programs in Computer Science for Software Development, Department of Electrical Engineering and Computer Science

Establishment of DIGT rubric for the BAsC programs in Digital Technologies, Department of Electrical Engineering and Computer Science

Degree requirements for the Specialized Honours BEng program in Civil Engineering, Department of Civil Engineering

Schulich

Establishment of GMMM rubric for courses in the Global Mining Management area

Establishment of SUST rubric for courses in the Sustainability area

ASCP reported on the following corrections to degree requirements effective FW2022-2023 that had been transmitted to the Committee for information:

Health

BA and BSc programs in Global Health

Bachelor of Health Studies programs in Health Policy, Health Management, Health Studies, and Health Informatics

BSc programs in Psychology

Lassonde

Complementary Studies Requirements for the BEng programs

LA&PS

Honours Minor BA program in Japanese Studies

BA programs in Religious Studies, Business and Society, and History
Bachelor of Human Resources Management programs

Science

BSc programs in Biology, Chemistry, and Physics and Astronomy
BA and BSc programs in Science and Technology Studies

Academic Policy, Planning and Research Committee (APPRC)

APPRC reported on the following items:

- its reflections on the ideas and suggestions surfaced in the APPRC-sponsored spring planning forum on the *Future of Pedagogy* and initial discussion of possible next steps
- its receipt of notification of the delayed opening of Markham Campus and input provided to President Lenton on academic planning and resource allocation matters to be considered as decisions are made about program launch options
- its concurrence with the recommendation of the Provost to establish the CIBC Chair in Sustainable Finance within the Schulich School of Business, which will proceed to the Academic Resources Committee of the Board of Governors and the Board for approval
- its receipt of a report on activities of Senate Executive's Sub-Committee on Equity

Awards Committee

The Awards Committee transmitted the 2020-2021 Graduate Award Disbursement report and congratulated the recipients of the 2022 President's Research Awards, who had been selected as a result of the Committee's adjudication in Winter 2022.

President's Research Excellence Award

Zheng Hong (George) Zhu, Lassonde

President's Research Impact Award

Seyed Moghadas, Science

President's Emerging Research Leadership Award

John Moores, Lassonde (Engineering, Science, Technology, Health and Biomedicine Cluster)

Amy Muise, Health (Social Sciences, Art & Design, Humanities, Business, Law and Education Cluster)

Additional Information about this Meeting

Please refer to the full Senate agenda and supplementary material posted online with the Thursday, April 28, 2022 meeting for details about these items.

<https://secretariat.info.yorku.ca/senate/meeting-agendas-and-synopses/>

May Meeting of Senate

Senate's next meeting will be held at 3:00 pm on Thursday, May 26, 2022.

Schulich School of Business Memorandum

To: Schulich Faculty Council

From: Marcia Annisette, Chair, Programs Coordinating Committee

Date: February 2nd, 2022

Re: Motion to Approve Changes to Schulich's Grading Policy and Guidelines

Motion:

That Faculty Council approve the proposed changes to Schulich's grading policy and guidelines as laid out in the appendix.

Rationale:

1. Addition of text to Item 1 on class participation under the Grading Guidelines section:

Proposed text has been added to express a general expectation that instructors include a diverse set of opportunities for class participation into their courses wherever possible. The degree to which students participate in a course can vary greatly due to factors such as their backgrounds, learning preferences and personalities, and adopting a greater range of methods can help create a sense of inclusivity and allow students to engage with the course in ways that might better align with their varying needs and abilities. Given the links between active learning, inclusive teaching practices, and mastery of course content, adopting more varied approaches can also result in enhanced learning and greater satisfaction with the overall course experience. With the adoption of more virtual learning within the School, the range of options for promoting and assessing participation has also multiplied. There is now a wide range of formats and tools, for both the in-person and virtual classroom, for facilitating participation in an inclusive manner. (For guidance and suggestions on how to incorporate different methods, instructors are welcome to contact the CITE Office at cite@schulich.yorku.ca).

2. Changes to Section 8 under Grading Policies:

Proposed text has been added to convey:

- i. the parameters around grade changes;
- ii. that a consistent rounding policy should be applied to all students in a course, not just within a single class (section)

Some programs have seen an increase in the frequency of students requesting changes to their marks. These requests are made for a variety of reasons, some of which are legitimate and some not. A student might explain, for example, that a grade increase is necessary to continue in the program or to retain a scholarship. Others may indicate that they are so close to achieving an A and an increase would really help them with their job prospects. These are not sufficient reasons to grant a grade increase and should be declined, no matter how close the students are to the next letter grade. However, some instructors, unfamiliar with policies and practices within the School or simply out of good intentions to help their students, may agree to make such adjustments. Doing so however can result in unfairness to other students and encourage a proliferation of requests. It is essential that instructors are consistent in how they respond to students, and that they take steps to distinguish between arbitrary grade increase requests and legitimate ones, such as instances of calculation errors and assessment errors that naturally require a grade change.

The proposed addition to the policy states that grade changes, beyond the rounding up or down of marks or the correction of errors, must be tied to the assessment of the course deliverables as outlined in the course syllabus, rather than based on unrelated reasons such as a need to continue in the program or to meet standards for a scholarship. Instructors should also not be assigning work to students for the sole purpose of increasing marks. If an instructor does want to provide an opportunity for students to gain additional course or assignment marks beyond what has been laid out in the course syllabus, the changes must be made available to all students in the course.

The language on rounding has also been refined to clarify that a consistent rounding policy should be applied to all students within a course, not just within a section (in the case of a multi-section course). The intent of this change is to ensure fairness across class sections.

Policies and Guidelines: Grading & Feedback

Note: The following was approved by the Schulich Faculty Council in November 2019 and is effective as of the Winter 2020 term.

Grades provide students with important feedback on their understanding of the course material and mastery of learning outcomes, and where they need to improve. Grading also provides instructors with feedback that can be used to make subsequent decisions about teaching, either within the semester, or for following iterations of the course. It can therefore be helpful to consider grading as part of the larger process of learning and assessment, rather than as a matter of determining a student's standing in class.

Effective grading involves a sequence of activities, including:

- establishing clear expectations through grading policies
- designing assessments that measure the achievement of learning objectives / outcomes
- establishing benchmarks and criteria for marking that reflect the student's mastery of the learning outcomes
- calibrating for consistency, fairness and adherence to relevant policies, and
- providing useful feedback that helps students understand what they know or can do, and how they can improve

Grading is a natural source of stress for both students and instructors. The policies and guidelines below are in place to help ensure that the grading practices at Schulich are accurate and transparent and that student performance is fairly assessed regardless of the course, section or instructor. They are also designed on the premise that effective grading functions as a tool for learning and encourage a focus on the learning process rather than on getting the right grade, thus reducing the likelihood of student complaints.

Grading and Formative Feedback

Grading Guidelines

1. Class participation should not account for more than 20% of the final grade. Exceptions to this guideline should be supported by a clear rationale. Instructors are encouraged to offer a diverse set of participation opportunities to account for differences in how students effectively communicate. Beyond traditional oral participation, the use of discussion boards, small group settings, class activities such as polls, and the video conferencing chat function in a virtual class should be considered.
2. Due dates for assignments should generally not fall within the set final examination period.
3. When presenting an assignment and returning marked work of qualitative nature, it is recommended that students receive a copy of the grading standards or marking rubric to avoid the perception of unfair grading practices and ensure transparency with regards to how marks are assigned. Rubrics explicitly state grading criteria and link grades to the learning goals of an assignment and course.
4. Instructors are encouraged to provide regular opportunities for formative feedback throughout their course. Formative feedback helps students identify their strengths and target areas to focus on while there is still time remaining in the course for improvement. Providing shorter but more regular feedback creates a continuous dialogue between students and instructors that manages students' expectations and develops their reflective skills.

5. If marks are allocated for participation, instructors should be transparent about how these marks will be determined. The inclusion of mark descriptors in the course outline (that indicate what students need to do to earn a particular participation mark) will clearly convey an instructor's expectations right from the start of the course. It is also recommended that instructors provide students with ongoing feedback regarding their participation. Mid-term check-ins, for example, will ensure students are not surprised by their result at the end of the course.
6. Please also refer the Faculty's course design guidelines.

Grading Policies

1. The components of the Schulich course outline template should be included in all course outlines. In addition to the items included in this template, course outlines should include the following information:
 - A description of the components (attendance, quality and quantity of contributions) upon which the participation mark will be based and how these components will be weighted;
 - A grading scale. If the instructor uses percentage scores, the grading scale must include a translation of the percentage score to a letter grade or index value (see examples below);
 - A statement as to whether grades will be curved and / or rounded in some way.
2. The course outline should be made available one month prior to the start of the course.
3. With the exception of courses explicitly required for certification by a professional body, or other exceptions agreed to by Senate, students pass or fail a course on the basis of their final course average, without the additional requirement of having to obtain a passing grade on a final examination. This policy does not exclude the possibility of a final examination representing more than 50% of the final grade in a particular course or the requirement that a student pass a specific course lab component.
4. Students should receive graded feedback worth at least 15% of the final grade for 3.00 credit courses prior to the withdrawal date from a course without academic penalty. (This policy does not apply to 1.50 credit courses, courses on a compressed schedule, practicum courses, or courses where the coursework typically consists of a single deliverable.)
5. No examinations or tests (in-class or take-home) collectively worth more than 20% of the course grade are permitted during the final 14 calendar days of classes in any Schulich course (Excepted are courses that run on weekends, courses in compressed terms, and courses with 6.0 or more contact hours per week.) An assignment is not considered a take-home examination if students have at least two weeks to complete it.
6. Instructors must keep class-by-class records of students' contributions towards their participation mark that can be audited if needed. It is strongly recommended that records of contributions be completed right after each class.
7. All class records, including records of class participation, should be retained for a period of twelve months and destroyed thereafter.
8. The way in which course grades will be calculated should be clear to students from the start of the term:
 - As Schulich does not use a standardized percentage grading scale, percentage grades have no automatic letter grade equivalent. However, instructors that choose to use percentage marks must use a fixed translation of percentages to letter grades or index values and make clear the translation in the course outline at the start of the term. Translations commonly used at York University are shown below.

- Students should be able to determine their letter grade or index value for each graded component of a course at the time the component is graded. If curving of grades is needed, it should take place at the time each component is graded, not at the time final grades are calculated. Students should be able, after each graded component is marked, to know their aggregate grade for the course at that time.
 - Final course grades should be the sum of all component grades multiplied by their respective weight.
 - The option to round grades is at the discretion of the instructor. If final grades are to be rounded, this should be stated in the course outline. A consistent rounding policy should be applied to all students in a [class course](#).
 - **Grade changes, beyond the rounding up or down of marks or the correction of errors, must be based on the assessment of the course deliverables as outlined in the course syllabus. Assignments given for the sole purpose of increasing marks are not permitted. Once a course is underway, instructors should not assign additional deliverables beyond those indicated in the course syllabus without the agreement of all students in the course. Any opportunities for students to gain additional course or assignment marks must be made available to all students in the course.**
 - For core courses with multiple sections, grades should be calculated in the same manner.
 - Each component of the final grade should be reported separately to students (this includes class participation grades).
 - Sections of required core courses are normally expected to have a mean grade of between 4.70 and 6.10 grade points for Masters-level core courses, and between 5.20 and 6.20 grade points for Masters-level electives. For undergraduate courses, the average course grade awarded within a section should be between 5.50 and 7.00. Grade distributions that do not meet this policy must be reviewed by the Area Coordinator or appropriate Program/Specialization Director. The Course Director and the approver should be prepared to explain the basis for the grade distributions that do not meet this policy.
9. Instructors must adhere to the policies communicated in their course outline and at the start of their course.

Common Grading Scales at York

The York undergraduate grading scale is the common undergraduate grading system used by the University.

Grade	Grade Point / Index Value	Percent Range (Schulich guideline only)
A+	9	90-100
A	8	80-89
B+	7	75-79
B	6	70-74
C+	5	65-69

Grade	Grade Point / Index Value	Percent Range (Schulich guideline only)
C	4	60-64
D+	3	55-59
D	2	50-54
E *	1	(marginally below 50%)
F	0	(below 50%)

* The letter grade E is not used within the Schulich School of Business, although other York Faculties use it. A failing grade of 'E' obtained in a non-Schulich course will be recorded as such and calculated into the GPA using an index value of 1.

Below is an example of a masters-level grading system with percentage score translation.

Grade	Grade Point/ Index Value	Percentage Points (Schulich guideline only)
A+	9	90-100
A	8	85-89
A-	7	80-84
B+	6	75-79
B	5	70-74
B-	4	65-69
C+	3	60-64
C	2	55-59
C-	1	50-54
F	0	0-49%

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Luke Zhu, Chair, Committee on Equity and Community
Date: March 1, 2022
Re: EDI question for Schulich New Course Proposal Form

Motion: That the Faculty Council approve the EDI question for Schulich New Course Proposal Form.

Rationale:

The EDI question (and the supplementary document) has been designed to ensure that all new courses are in alignment with Schulich's commitment to equity, diversity, and inclusion. Specifically, this question helps instructors assess the extent to which the principles of equity, diversity, and inclusion are reflected in the learning outcomes, content, and delivery of the proposed course. Working with York's Teaching and Learning Commons, we also have developed a supplementary document that aims to provide instructors with specific guidelines and tools for how to more effectively integrate EDI into new courses.

New Course Proposal Form

Schulich School of Business

The following information is required for all new course proposals. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

All new course proposals must include a library statement, course outline and motion document. Provide evidence of consultation, where appropriate.

1. Responsible Program:
E.g., Schulich MBA, BBA, iBBA Program
2. Responsible Unit:
Unit responsible for the course, e.g., Faculty Departments (ACTG, FINE).
3. Subject Code (Rubric) and Course Number:
E.g., MGMT 5150 or ACTG 2010
4. Credit Value:
E.g., 1.50, 3.00
5. Long Course Title:
6. Short Course Title:
This is the title that will appear on University documents where space is limited, such as transcripts and lecture schedules. The short course title may be a maximum 40 characters, including punctuation and spaces.
7. Effective Term/Calendar Year:
Academic term in which the proposed change will take effect. E.g., Winter 2025
8. Language of Instruction:
9. Calendar (Short) Course Description:
This is the description of the course as it will appear in the University course repository and related publications. Calendar (short) course descriptions should be written in the present tense and may be a maximum of 60 words. Please include information with respect to any pre-/co-requisites and/or cross-listing or integration in the course description.
10. Expanded Course Description:
This is the detailed course description that will be published in course outlines, program

handbooks, etc. Expand upon the short description in order to give academic approval committees a full and clear sense of the aims and objectives of the course and the types of materials it will cover.

11. Course Learning Outcomes:

(Necessary for Quality Assurance approval and cyclical program reviews)

What will students be able to do upon completion of this course specifically?

12. Rationale:

Please indicate how the proposed course will contribute to the academic objectives of the program. Please provide a description of the learning outcomes/objectives for the course. As well, please indicate the relationship of the proposed course to other existing options, particularly with respect to focus/content/approach. If overlap with other existing courses exists, please indicate the nature and extent of consultation that has taken place. Additionally, please append the program's existing learning outcomes as a separate document.

13. Evaluation:

Please supply a detailed breakdown of course requirements, including the type and percentage value of each assignment. The expectation is that course assignments can normally be accomplished within the course period. If applicable, details regarding expectations and corresponding grading requirements with respect to attendance and participation should be provided.

14. Integrated Courses:

Graduate courses may be integrated only with undergraduate courses at the 4000-level, where it is understood that 4000-level indicates an advanced level. Graduate students will be expected to do work at a higher level than undergraduates. If the proposed course is to be integrated, please provide a grading scheme that clearly differentiates between the work that undergraduate and graduate students perform, including a description of how the work performed by graduate students is at a higher level. As well, please indicate the course information for the undergraduate/graduate course (i.e., Faculty/unit/course number/credit value) and include a statement from the relevant undergraduate/graduate chair or undergraduate/graduate director indicating agreement to the integration.

15. Cross-listed Courses:

Cross-listed courses are offered between two or more programs. For cross-listed courses, please include a statement of agreement from the director of the other program(s).

16. Enrolment Notes:

Is the course limited to a specific group of students; closed to a specific group of students; and/or if there is any additional information necessary for the student to know before enrolling.

17. Faculty Resources:

Provide the names of faculty members in your program qualified to teach this course. Stipulate the frequency with which you expect this course to be offered, including the impact that this course will have on faculty resources.

18. Physical Resources:

Please provide a statement regarding the adequacy of physical resources (equipment, space, labs, etc.), including whether or not additional/other physical resources are required and how the need for these additional/other physical resources will be met.

19. Bibliography and Library Statement:

Please provide an appropriate and up-to-date bibliography in standard format. A statement from the University librarian responsible for the subject area certifying that adequate library resources are available for the new course must be provided.

New Course Proposal Template

(Part B - Schulich Use Only)

20. Instructors and Faculty Coordinator

Initial instructor:

Indicate who will be the first instructor for this course.

Alternative instructors:

Indicate other persons, especially full-time faculty members, who have the ability and interest to teach this course in the future.

Course coordinator:

Indicate the full-time faculty member who will coordinate this course, in the event it is taught by a part-time instructor or is offered in multiple sections.

21. Specializations

Primary area or specialization:

Indicate the primary area or specialization where the proposed course will be listed in the program handbook.

Secondary areas or specializations:

List all other areas or specializations where the proposed course will be listed as an elective.

22. Student Contact and Enrolment

Contact hours:

State the number of classroom hours of this course per term. If there is a lab requirement, also state the number of lab hours per term.

Maximum enrolment:

For core courses, 55. For electives, 45. Any other maximum requires approval from the Associate Dean Academic and explicit endorsement from the Program Committee and Faculty Council.

Expected enrolment:

State the expected “steady-state” enrolment. It is understood that new courses may take one or two terms to reach this level.

Evidence for enrolment expectations:

Provide evidence or a rational argument for your enrolment expectations.

23. Equity, Diversity, Inclusion, Decolonization and Indigenization Action Plan

- a) Describe how equity, diversity, and inclusion including decolonization and Indigenization perspectives are reflected in (1) content (e.g., assigned readings, materials, case studies, etc.) and (2) delivery (e.g., ensuring that everyone is included and that diverse perspectives are valued and respected) the proposed course.
- b) Describe how this course contributes to students’ learning about equity, diversity, inclusion, and decolonization with respect to the context of this course.

24. Human Participants Research

If any assignment for this course involves Human Participants Research, the course outline should make reference to the Human Participants Research procedures and approval process. Otherwise indicate “N/A”.

25. Conditions for Approval

If this proposal is for a new elective course, please indicate which one of the following conditions required by Faculty Council applies:

- c) The Area is deleting courses with at least the same total number of credits. Specify the course or courses being deleted.
- d) Provide a convincing case for the proposed course.
State the reason the program needs this new course and provide evidence that the Area has no elective with student enrolments low enough to warrant deletion.
Approval from the ADA will be required.

Originator:

Signature

Date

Name

Area or Specialization

Supporting Faculty Members

The course originator should consult with other interested parties and obtain their support. Support should be obtained from other units of the university if their interests are related to this course.

The faculty members whose names appear below (minimum 6) confirm that they have examined this course proposal. They feel it is a worthwhile addition to the SSB curriculum and does not, to their knowledge, significantly duplicate the content of existing courses.

Name of faculty member Area or Specialization

Name of faculty member Area or Specialization

Name of faculty member Area or Specialization

Name of faculty member Area or Specialization

Name of faculty member Area or Specialization

Name of faculty member Area or Specialization

Approvals

Area or Specialization:

I have reviewed this course proposal with the faculty members of this Area or Specialization, and I support the addition of the course to the SSB curriculum.

Signature

Date

Name of Coordinator or Director

Area or Specialization

Degree Program:

I support the addition of the course to the SSB curriculum.

Signature

Date

Name of Program Director

Program

Program Committee:

This course proposal has received the approval of the relevant Program Committee and documentation attesting to the faculty member support for the course has been received and archived by the committee chair.

Signature

Date

Name of Committee Chair

Committee

Delete This section once form is complete.

Required Attachments:

For changes in the number of credits, course title or course description, please attach the Schulich course outline (which must conform to program norms; see the Program Assistant for details).

For cross-listed / integrated courses, please include a signed statement of agreement from the director of the other course / other degree program.

Send to:

Send an electronic copy of all forms and attachments, and forward emails of support from other faculty members to the appropriate program committee secretary.

Support for Schulich Course Proposal Form's Commitment to Equity, Diversity, Inclusion (EDI)

The Schulich School of Business at York University supports an exceptionally diverse student body and takes pride in teaching students to respect diverse communities and building leaders to do the same. Schulich has taken serious initiatives to put equity, diversity, and inclusion (EDI) at the forefront of the School to build an **inclusive academic and work environment** and to prioritize EDI in the education Schulich students receive. Education has historically been a tool of both liberation and oppression for many of our students, and as such, it is paramount to consider issues of equity and justice when planning, designing, and engaging in academic affairs. Prioritizing equity, diversity, and inclusion in course design helps to address these issues while empowering and supporting traditionally under-represented, marginalized, and oppressed groups of students. Fostering EDI in the classroom does not involve a simple checklist or universal structure as it is both dynamic and fluid and requires much self-reflection and individualized action.

Below are some broad **guiding reflective prompts, recommendations, and considerations** to help ensure **course content, materials, lessons, and delivery** support EDI. While this is targeted at the development of new courses, these points may be also useful to consider for courses currently offered. Resources have been embedded within each of the following points below, as well as in the section entitled 'General Resources'. Please note that in printed copies of this document, the embedded resources may not be apparent.

1. Authorship of Course Materials

Consider the **authorship** of course materials and resources, as well as **who is invited to speak as an authority** in the classroom (e.g. guest speakers) – who is included? Who is excluded? Which **lenses and perspectives** are represented, and which are not?

- Explicitly include **Indigenous frameworks, lenses, and voices** (e.g. TRC is listed in course topics, but no evidence of Indigenous voices; what about Indigenous perspectives on families, mental health, etc.?).
- Explicitly include **anti-Black-racism frameworks**, lenses, voices, and **pedagogies**.
- Explicitly include **Critical Disability Studies frameworks**, lenses, and voices.
- Explicitly include gender-diverse and gender-equitable pedagogies in your course. For example, you may wish to consider **gender affirming practices** as well as **gender inclusive** and/or **feminist pedagogies** in your **course design**.

2. Land Acknowledgements

How are **land acknowledgements** utilized within the course (i.e. through course syllabus, activities, discussions)? Are land acknowledgements done in a **meaningful way** and in

accordance with the **goal of Indigenous communities**? Are they **connected to the course**? How are they done virtually? Are there opportunities for reflection, discussion, and/or activities related to acknowledging the land? Is **context** provided for students (or faculty) who may not be familiar with truth and reconciliation and the significance and importance of conducting a land acknowledgement? What are the **distinctions between Indigenous and non-Indigenous faculty members and/or students** in relation to how a land acknowledgement is conducted? How might conducting a land acknowledgment affect the **experiences** of Indigenous students?

3. Challenging Assumptions

In each course, what **implicit assumptions** are being made about populations and individuals that are referred to? For example, when speaking of stakeholders, consumers, clients, etc. is **presumptive language** used regarding gender, sex, race, ethnicity, disability, age, etc.? **Who (and what) is valued** in business discourse within the course? What ‘lens’ does the course take (e.g. a Eurocentric lens)? How is **power-imbalanced language** engaged with? Considering the global dimensions of business, be diligent when approaching discourses and conversations surrounding diverse businesses, cultures, companies, countries, workers, and other socio-cultural contextual aspects of the field.

4. Language and Terminology

Remain cognizant of the ways that **language and terminology** are used within the course syllabus, course activities, course assessments, course reading materials, and when engaging with students. For example, is there an active effort to ensure that writing is inclusive and anti-racist? Is there an active effort to utilize preferred pronouns of students and gender-inclusive language? Is there an active effort to refrain from dis/ableist language and pejorative terms? Is there an active effort to use preferred identity terms by various groups? Is there an active effort to use appropriate language and terms?

5. Challenging Bias and Taken-for-Granted Ways of Thinking

Consider possible course learning outcomes related to **UN-learning/ RE-learning** (e.g. in critically engaging with and reflecting on course content, some students may need space for unpacking existing ways of thinking as well as for exploring new ways of thinking). Consider how implicit bias and microaggressions can influence student learning and prepare to resist and respond to these if they occur in the classroom. Incorporate strategies for facilitating difficult conversations in the classroom.

6. Considering Positionality and Lived Experiences

How and where will students see themselves and their **lived experiences** in this course/content? With this in mind, how can you foster a **safe/brave space** for having these conversations and how will students be **protected and supported** in these courses?

7. Diversity in Course Engagement

In accordance with [Universal Design for Learning \(UDL\)](#), are there **opportunities for diversity** in the ways that students receive and express knowledge? Are there diverse ways of **providing information** to students? Are there diverse ways for students to **engage** both with the course and with one another?

8. Exemplifying EDI

In each course, show how you not only as teach EDI as content, but also **actively practice and model** it as well. For example, in outlining your approach to course design in the course proposal form, can you explicitly connect your strategies and rationale to a **commitment to practicing EDI** in the classroom? When you discuss course content, assessments, and learning outcomes, can you **draw connections** to Universal Design for Learning (UDL) as an equity-oriented practice? In short, what is the **EDI rationale** behind outcomes, activities, assessments, course design, pedagogies? (For example, if relying on group projects for assessments, consider referencing [in your proposal] the use of community agreements or other strategies that support EDI for students and faculty)

9. EDI in the Business World

Consider how the structure and content of the course can impact students in **real-world professional business contexts**:

- How does EDI manifest in the **entrepreneurial thinking and training** of students? Is there space for students to both contribute and learn of **diverse voices, perspectives, and ideas**?
- As [future] business professionals, what strategies are in place to ensure that students will be equipped to make **meaningful connections** in the world and contribute to **globally diverse communities**, and make and encourage **equitable contributions** as members of diverse teams?
- Are there tools in place for students to ensure their **professional practice** is informed by principles of equity?

10. Leveraging Supports

Reference how the **department/faculty/university will support instructors** in implementing Experiential Education (EE), Technology Enhanced Learning (TEL), UDL specifically in equity-oriented courses. Part of this can be ongoing or future consultations with the Office of Curriculum Innovation and Teaching Excellence, the Teaching Commons, technology support services, and other available supports.

Please see below for a list of embedded resources used throughout this document as well as resources for future reading.

General Resources:

Anti-racist pedagogies: <https://sites.lsa.umich.edu/inclusive-teaching/wp-content/uploads/sites/853/2021/08/Implicit-Bias.pdf>

Defining Principles and Values (York University; Vice-President Equity, People, Culture) *these have been informed by York's Centre for Human Rights, Equity, and Inclusion: <https://www.yorku.ca/vpepc/principles-and-values/>

Diversity, Equity, and Inclusion Working Group at Schulich: <https://schulich.yorku.ca/about/dei-working-group/>

Canadian Race Relations Foundation Glossary of Terms: <https://www.crrf-fcrr.ca/en/resources/glossary-a-terms-en-gb-1>

Centre for Human Rights, Equity, and Inclusion (York University): <https://rights.info.yorku.ca>

Challenging Implicit Bias and Microaggressions in the Classroom: <https://resources.depaul.edu/teaching-commons/teaching-guides/inclusive-teaching/Pages/implicit-bias.aspx>

Disability Language Style Guide (National Center on Disability and Journalism): <https://ncdj.org/style-guide/#A>

Equity and Inclusion Glossary of Terms (University of British Columbia): <https://equity.ubc.ca/resources/equity-inclusion-glossary-of-terms/>

Facilitating Difficult Conversations in the Classroom: <https://resources.depaul.edu/teaching-commons/teaching-guides/instructional-methods/Pages/discussions.aspx#facilitating-difficult-discussions>

Gender Affirming Practices for the Classroom: <https://cft.vanderbilt.edu/guides-sub-pages/teaching-beyond-the-gender-binary-in-the-university-classroom/>

Gender and Education Association Feminist Pedagogy Guide: <http://www.genderandeducation.com/issues/feminist-pedagogy/>

Guide to Feminist Pedagogies: <https://my.vanderbilt.edu/femped/>

Gender Inclusive Pedagogy: <https://citls.lafayette.edu/gender-identity-in-the-classroom/>

Identity Terms: <https://openbooks.library.umass.edu/introwgss/chapter/identity-terms/>

Importance of Land Acknowledgments: https://www.youtube.com/watch?v=nG_iMUHFuOg

Indigenous or Aboriginal, which is correct? <https://www.ictinc.ca/blog/indigenous-or-aboriginal-which-is-correct>

Native Land Education Guide (Land Acknowledgements): https://native-land.ca/wp-content/uploads/2019/03/teacher_guide_2019_final.pdf

Responding to Microaggressions in the Classroom:
<https://www.insidehighered.com/advice/2016/04/13/how-be-ally-someone-experiencing-microaggressions-essay?src=SocialMediaFB>

Responding to Microaggressions in the Classroom (ACTION Framework):
<https://www.facultyfocus.com/articles/effective-classroom-management/responding-to-microaggressions-in-the-classroom/>

Significance of Land Acknowledgements: <https://www.cbc.ca/news/canada/toronto/territorial-acknowledgements-indigenous-1.4175136>

Truth and Reconciliation Commission of Canada: <https://nctr.ca/about/history-of-the-trc/truth-and-reconciliation-commission-of-canada/>

Additional Resources

Advancing Equity, Diversity and Inclusion Across the Business World:
<https://www.uoguelph.ca/lang/news/2021/02/advancing-equity-diversity-and-inclusion-across-business-world>

Business Schools and Inclusivity: <https://www.theglobeandmail.com/business/rob-magazine/article-business-schools-have-committed-to-becoming-more-inclusive-but-has/>

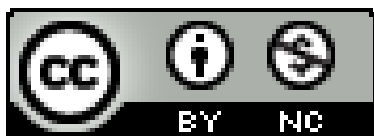
Diversity for Managers:
<http://www.sfu.ca/content/dam/sfu/wwest/Documents/Understanding%20Workplace%20Diversity%20-%20for%20Managers.pdf>

Equity, Diversity, Inclusion, and Indigeneity at Smith School of Business (Queen's University):
<https://smith.queensu.ca/about/EDII/background.php#>

Equity, Diversity, and Inclusion at Alberta School of Business (University of Alberta):
<https://www.ualberta.ca/business/about/equity-diversity-inclusivity.html>

Implicit Bias in Higher Education Teaching (Podcast):
<https://teachinginhighered.com/podcast/implicit-bias-in-our-teaching/>

Why EDI is important to companies and how to drive lasting change:
https://www.humi.ca/blog-post/defining-equity-diversity-and-inclusion-edi-in-the-workplace?visitor_id=K1pWmnJ7qtw4cp



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Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Eileen Fischer, PhD Program Director and PhD Program Committee Chair
Date: May 9, 2022
Re: Motion to Change the Course Code of PLCY 7010 and PLCY 7020

Motion:

To change the course code of PLCY 7010 (Strategic Management Seminar I) and PLCY 7020 (Strategic Management Seminar II) to SGMT 7010 and SGMT 7020 respectively.

Rationale:

The PhD program in Policy (Strategic Management) currently has two required seminars in the Policy area:

PLCY 7010: Strategic Management Seminar I

PLCY 7020: Strategic Management Seminar II

Several years ago, the Policy area established three new PhD elective courses which used the course code SGMT. These electives are SGMT 7030, SGMT 7040, and SGMT 7050. The plan at the time was to switch the course code of the two core courses in the PhD program to SGMT as well (PLCY 7010 and PLCY 7020). Policy has become an outdated term in the field of strategic management. It was commonly used to refer to business policy, but the field has moved on and “strategic management” is now the more commonly used term. Given that the name of the Policy area is changing to Strategic Management on May 1, changing these course codes will also be better aligned with the area’s new name. This change adds clarity and better reflects the content of these courses.

There is no change to the content of the course, or any other aspect of these courses.

Change to Graduate Program/Graduate Diploma Academic Requirements Proposal Form Schulich School of Business

1. Graduate Program/Graduate Diploma:

Ph.D. Program in Administration (Field = Strategic Management)

2. Effective Term/Calendar Year of Proposed Change(s): Fall Term, 2022

3. Proposed Change(s) and Rationale:

The PhD program in Policy (Strategic Management) currently has two required seminars in the Policy area:

PLCY 7010: Strategic Management Seminar I

PLCY 7020: Strategic Management Seminar II

Several years ago, the Policy area established three new PhD elective courses which used the course code SGMT. These electives are SGMT 7030, SGMT 7040, and SGMT 7050. The plan at the time was to switch the course code of our two core courses in the PhD program to SGMT as well (PLCY 7010 and PLCY 7020). Policy has become an outdated term in the field of strategic management. It was commonly used to refer to business policy, but the field has moved on and “strategic management” is now the more commonly used term. Given that the name of the Policy area is changing to Strategic Management on May 1, changing these course codes will also be better aligned with the area’s new name. This change adds clarity and better reflects the content of these courses.

There is no change to the content of the course, or any other aspect of this course. There is no impact on learning objectives, other programs/graduate diplomas, or resource allocations. Students currently enrolled in the graduate program/graduate diploma are not affected and therefore accommodations are not required.

4. Calendar Copy:

Existing Graduate Program/Graduate Diploma Information (Change From):	Proposed Graduate Program/Graduate Diploma Information (Change To):
Title PLCY 7010 Strategic Management Seminar I PLCY 7020 Strategic Management Seminar II	Title SGMT 7010 Strategic Management Seminar I SGMT 7020 Strategic Management Seminar II

Stephanie Allen

From: Eileen Mary Fischer
Sent: Monday, May 9, 2022 12:48 PM
To: Stephanie Allen
Subject: Re: 'Degree Program' or 'Program Committee'? - RE: PhD PLCY/SGMT Changes
Attachments: Course Change Proposal Form SGMT 7010.docx

Hi Stephanie: As Chair of the PhD Program Committee, I am writing to convey approval of the Strategic Management area's program change.

Regards,

Eileen

Course Change Proposal Form

Schulich School of Business

The following information is required for all course change proposals. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading). Provide evidence of consultation, where appropriate.

- 1. Responsible Program:** Schulich PhD Program
- 2. Responsible Unit:** Policy Area (renamed Strategic Management as of May, 1 2022)
- 3. Subject Code (Rubric) and Course Number:** PLCY 7010
- 4. Credit Value:** 3.00
- 5. Long Course Title:** Strategic Management Seminar I
- 6. Short Course Title:** Strategic Management Seminar I
- 7. Type of Course Change(s) (indicate all that apply):**

	in course number
	in credit value (provide course outline)
	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
	in integration (please provide statement of approval from relevant undergraduate coordinator or Chair)
	in cross-listing (please provide statement of approval from other program)
	in pre/co-requisite
	retire course
X	other (please specify) Change in the course code from PLCY to SGMT.

- 8. Effective Term/Calendar Year of Proposed Change(s):** Fall 2022

9. Rationale:

The PhD program in Policy (Strategic Management) currently has two required seminars in the Policy area:

PLCY 7010: Strategic Management Seminar I

PLCY 7020: Strategic Management Seminar II

Several years ago, the Policy area established three new PhD elective courses which used the course code SGMT. These electives are SGMT 7030, SGMT 7040, and SGMT 7050. The plan at the time was to switch the course code of our two core courses in the PhD program to SGMT as well (PLCY 7010 and PLCY 7020). Policy has become an outdated term in the field of strategic management. It was commonly used to refer to business policy, but the field has moved on and “strategic management” is now the more commonly used term. Given that the name of the Policy area is changing to Strategic Management on May 1, changing these course codes will also be better aligned with the area’s new name. This change adds clarity and better reflects the content of these courses.

There is no change to the content of the course, or any other aspect of this course.

10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title PLCY 7010	Title SGMT 7010

11. Enrolment Notes: N/A

12. Consultation: The instructors who teach this course and the PhD representative of the Policy/Strategic Management Area have been consulted and approve this change.

Originator:

Willow Sheremata
Signature

April 7, 2022
Date

Willow Sheremata
Name

Policy/Strategic Management
Area or Specialization

Approvals:

Area or Specialization

I have reviewed this change form and I support the proposed changes to the course.

Willow Sheremata
Signature

April 7, 2022
Date

Willow Sheremata
Name

Policy/Strategic Management
Area or Specialization

Degree Program:

I have reviewed this change form and I support the proposed changes to the course.

Eileen Fischer
Signature

May 9 2022
Date

Eileen Fischer
Name of Program Director

PhD Program
Program

Program Committee:

This course change has received the approval of the relevant Program Committee.

Eileen Fischer

Signature

May 9, 2022

Date

Eileen Fischer

Name of Committee Chair

PhD Program Committee

Committee

Delete This section once form is complete.

Required Attachments:

- ☐ *For changes in the number of credits, course title or course description, please attach the Schulich course outline (which must conform to program norms; see the Program Assistant for details).*
- ☐ *For cross-listed / integrated courses, please include a signed statement of agreement from the director of the other graduate course / other degree program.*

Send to:

Send an electronic copy of all forms and attachments, and forward emails of support from other faculty members to the appropriate program committee secretary.

**SCHULICH SCHOOL OF BUSINESS
YORK UNIVERSITY**

**SB SGMT 7010.030A (7020)
STRATEGIC MANAGEMENT SEMINAR I**

The Behavioral Foundations of Strategic Management ¹

Winter Term, 2022

Friday 8:00-11:00 AM

Room: NA

Professor: Moshe Farjoun
Email: mfarjoun@schulich.yorku.ca
Room: S123 SSB

Secretary: Stephanie Allen
Office: N305B SSB
Telephone: 416-736-6125

I. Course Objectives and Description

This course introduces doctoral students to research in strategic management with a particular emphasis on the behavioral and administrative foundations of the field i.e., 'Behavioral Strategy'. The field of strategic management is concerned with understanding the sources of firms' success and failure as a prerequisite for improving their performance. Strategy is thus viewed as an important determinant of success. The field draws from a variety of intellectual disciplines such as economics, organization theory, military studies, and the natural sciences. It integrates and complements other business specialties such as operations, marketing, finance, information technology, and human resources. The field is also distinct from other areas of study in its focus on competitive advantage, the definition of firm's scope of business and the adoption of a top management integrative perspective.

Because strategy is concerned with matching organizational resources with environmental challenges, strategy research has naturally drawn on economics and organization theory as its two main disciplines. Economists were inclined to apply their ideas about markets and efficiency, whereas organizational theorists were inclined to apply their observations about the behavior of individuals, groups, and organizations. Over the years, these artificial boundaries became more blurred as economists became interested in understanding organizations and organizational theorists in understanding markets and competition. Furthermore, the influence of natural sciences on both economics and organization theory has increased.

From its very inception, the field of strategy has built on many concepts, ideas and theories from the administrative and behavioral sciences (Jemison, 1981). These ideas have been mainly applied in the three areas of strategic design, strategy implementation and change, and strategic decision-making. As the field of strategy evolved and gained a more distinct identity, behavioral ideas have penetrated other intellectual territories and start featuring in areas such as networks, firm diversity, shaping strategies, industry cultures and learning and interpretation.

Drawing on this evolution, in this course we will learn how key ideas about organizations and organizing have contributed to the understanding of major strategy questions and phenomena as well as how traditional and new ideas might continue to play a role in the field's future evolution and in the contemporary phenomena it studies. We will also attempt to gain a better

¹ "The social science of strategy" or "strategy and social theory" are likely more appropriate course titles

understanding of the distinct nature of behavioral oriented research in strategy as well as the ways it can be integrated with economic concepts and ideas.

My ultimate objective in this course is to help develop future strategy researchers - understand and appreciate behavioral ideas and use them to conduct independent research in the future. The course will also expose the students to the nature of academic research and to the social context of the field of strategy.

II. Course outline

Below is a tentative outline of our course meetings:

Session	Topic	Date	Session Leadership
1	The strategic management field: domain, evolution, and central questions and debates	January 14	Instructor
2	On doing research (in strategy)	January 21	Instructor
3	Classics/OT	January 28	Instructor
4	Other behavioral and organizational foundations	February 4	Instructor
5	Strategy and strategy formation	February 11	With designate student (s)*
6	Strategic decision making/TMT	February 18	With designate student (s)
7	Strategic change, persistence and renewal	March 4	With designate student (s)
8	Strategy/structure/configurations and contradictions	March 11	With designate student (s)
9	Learning/interpretation/cognition	March 18	With designate student (s)
10	Conceptions of markets and competitive processes	March 25	Instructor
11	Firm heterogeneity, shaping and sustained competitive advantage	April 1	With designate student (s)
12	Emerging topics	April 8	Instructor

* Potential special guest presentation around here

III. Course Requirements

1. Participation and class discussion:

I view class discussion and interactions as an important learning mechanism. Students who will not be able to attend class for some important reason must notify me in advance so to allow any needed rescheduling. I expect the students to come well prepared to each class and to contribute to class discussion. Good participation is indicated by preparing the suggested class discussion questions as well as raising new questions based on the readings. Overall, I expect students to raise original ideas, make constructive comments, and have a positive attitude towards learning.

2. Ongoing readings

I provide below the reading lists and discussion questions for each of the sessions. Students are required to master the readings and prepare points for discussion in the class. I organized the readings in each session around particular themes. I encourage the students to identify points of convergence and divergence in each session's readings. As the course progresses, I expect the students to draw connections across themes and to gradually form a rich and refined perspective on the subject matter of the course with an eye towards its application.

3. Behavioral foundations summary

The students will prepare a ten-page summary of the first four sessions due at the beginning of session 5 (expected date February 11). The goal of this assignment is to build a strong base in the behavioral foundations covered in the first four weeks, particularly in sessions 3 and 4, before proceeding to their applications to strategy. The assignment has some overlap with the discussion questions for session 3 and 4 and will extend them based on more reflection on the readings. The particular questions/tasks are:

- I. Identify 2-3 key behavioral concepts, ideas, or theories from the readings for sessions 1-4.
- II. Examine one or more central questions of strategy that can be addressed using the above.
- III. Summarize the key differences between the economic and behavioral foundations.
- IV. Summarize key differences in emphasis between the psychology/decision making/behavioral tradition and the sociological/structural tradition.

4. Written critiques and presentations of specific readings

Starting around session 5 the students will prepare and present up to two critiques of course materials. Potential papers are highlighted in the syllabus *in blue*. In each of these sessions, and in addition to the regular discussion, a designated student will be responsible for reading one or two assigned articles, summarizing, critiquing, and evaluating the readings in writing, and presenting this work in the class. I expect the written assignment to be not more than five pages long (double spaced 12 fonts). A typical outline will include a summary of the article(s), including the empirical part when appropriate, a critique and evaluation of the article(s) main strengths and weaknesses, and a discussion of new directions for future research. In addition, I highly recommend discussing how the article fits with the set of readings assigned for that topic and/or with other relevant course readings. It is important not to dwell on the summary of the article(s) beyond what is necessary for the rest of the assignment. The power-point presentation will summarize the written assignment in up to 20 minutes and will lead to the general discussion in class. The grades for these assignments will be based on both the written assignment and class presentation. I will assign the materials for each student as the course progresses².

5. Term paper

The paper's goal is to build on the course's material to develop an original and publishable strategy paper. The topics of the paper may vary but will focus on the themes and topics discussed in the course. The paper will usually take the form of a conceptual or theoretical stand-alone piece. An alternative is a front-end of a larger empirical project. In this case, some directions as to how the paper may be empirically tested should be examined in the discussion section. The length

² The suggested list includes about 12 papers to select from.

requirement is approximately 25-30 double spaced pages. The students are required to submit a one-page paper proposal at the beginning of session 4. Students are encouraged to work closely with the instructor on developing their ideas, to identify relevant references and to address any other issues that arise. The due date for the paper is April 15, 2022.

IV. Evaluation:

Class Participation and preparation	10%
Paper critiques and presentations	30%
Behavioral foundations essay	10%
Final paper	50%

V. Course materials (key additions and revisions are marked in rouge or blue):

Books (I recommend using the most recent editions, as available):

A. Behavioral Foundations of Strategy

Required:

Bromiley, P. 2005. *The Behavioral Foundations of Strategic Management*.

Blackwell Publishing. Malden, MA.

Baum, J. A. C., and F. Dobbin (Eds.). 2000. *Economics Meets Sociology in Strategic Management. Advances in Strategic Management*. JAI Press Inc. Stamford, CT.

Recommended

Jackson, W. A. 2019. *Markets: Perspectives from economic and social theory*. Routledge: London.

B. Organization Theory- Foundations

(If you do not have these books, you may consider obtaining them):

Cyert, R. M. and J. g. March. 1992. *A Behavioral Theory of the Firm*. (Second edition)

Englewood Cliffs, NJ: Prentice-Hall.

Nelson and Winter, 1982. *An evolutionary theory of economic change*. Cambridge, MA: Harvard University Press.

C. Strategic Management: Foundations and applications of behavioral ideas

(I strongly advise purchasing these books):

Allison, G. T. and Zelikow, P. 1999. *The essence of decision: Explaining the Cuban Missile Crisis*. 2nd edition. Addison Wesley – Longman, New York.

Chandler, A. D., Jr. 1962. *Strategy and Structure: Chapters in the History of the Industrial Enterprise*. Cambridge, MA: MIT Press.

Mintzberg, H. Ahlstrand, B. and J. Lampel; 2009 (2nd edition) *Strategy Safari: A guided tour through the wilds of strategic management*. The Free Press, New York.

Rumelt, R. 2011. *Good strategy Bad strategy: the difference and why it matters*. Deckle edge.

Recommended

Pisano, G. P. (2019). *Creative construction: The DNA of sustained innovation*. Public Affairs.

Iansiti, M. and Lakhani, K. (2020) *Competing in the age of AI: Strategy and leadership when*

algorithms and networks run the world: Harvard Business Review Press

D. Methods (I recommend buying the first).

Van de Ven, A. H. 2007. ***Engaged scholarship: A guide for organizational and social research.***
Oxford University. Oxford, U.K.

Abbott, A. 2004. ***Methods of Discovery: Heuristics for the social sciences.*** W. W.
Norton & Company. New York, NY.

Strategic Management Journal: I would recommend looking at all issues published in the recent 12 months. In addition, SMJ has several virtual issues as well as special issues. Please check <https://www.strategicmanagement.net/smj/overview/special-issues/past-special-issues>
As well, there are two relatively new journals in the field: *Strategy Science* and *Strategic Management Review*.

VI. Detailed Schedule and readings:

Introduction and course organization

(First meeting - first half of the class)

Topic 1: The strategic management field:

Domain, evolution and central questions and debates

(Second half of the class and first half of the second meeting)

Readings for the first meeting:

Required:

Rumelt R. P., Schendel, D. E. and D. J. Teece, 1995. Fundamental issues in strategy. Chapter 1 (pp. 9-47) in ***“Fundamental issues in strategy: A research agenda”***, Rumelt R. P., Schendel, D. E. and D. J. Teece (Eds.). Harvard Business School Press, Boston, MA.

Rumelt R. P., Schendel, D. E. and D. J. Teece, 1995. Afterwards. (pp. 527-555) in ***“Fundamental issues in strategy: A research agenda”*** Rumelt R. P., Schendel, D. E. and D. J. Teece (Eds.). Harvard Business School Press, Boston, MA.

Optional:

Durand, R., Grant R, and tammy L. Madsen, 2017: The expanding domain of strategic management research and the quest for integration. ***Strategic Management Journal***, 38:4-16.

Farjoun M, 2002. Towards an organic perspective on strategy. ***Strategic Management Journal***, 23: 561-594.

Lieberman, M. (2020). Is competitive advantage intellectually sustainable?

Discussion questions for the first meeting:

1. What were the main developments in the evolution of the strategic management field?
2. What are the central questions for the field?
3. What are the key debates and views on these questions?
4. What seems to be the state of the field now? Where is it heading?

Topic 2: On doing research (in strategy)

(Second and third meetings)

Required readings:

Daft R. L. 1983. Learning the craft of organizational research. ***Academy of Management Review***. 8 (4): 539-546.

Tihanyi, L. (2020). From “that’s interesting” to “that’s important”. ***Academy of Management Journal***, Vol. 63, No. 2, 329–331.

Weick, K. E. 1989. Theory construction as disciplined imagination. ***Academy of Management Review***, 14(4):516-531.

Alvesson, M. and D. Kärreman, 2007. Constructing mystery: Empirical matters in theory

development. *Academy of Management Review*, 32(4): 1265-1281.

Langley, A. 2007. Process thinking in strategic organization. *Strategic Organization*: 5(271-282).

Timmermans, S., & Tavory, I. (2012). Theory construction in qualitative research: From grounded theory to abductive analysis. *Sociological theory*, 30(3), 167-186.

Optional:

Farjoun, M. 2021. "The Becoming of Change in 3D: Dialectics, Darwin and Dewey" in Poole, M. S. and Van de Ven, A.H. *Oxford Handbook of Organization Change and Innovation*, 2nd Edition, by Oxford University Press.

Van de Ven, A. H. 2007. Chapters, 3-7. *Engaged scholarship: A guide for organizational and social research*. Oxford University. Oxford, U.K.

Sætre, A. S., & Van de Ven, A. H. (2021). Generating Theory by Abduction. *Academy of Management Review*

Abbott, A. 2004. *Methods of Discovery: Heuristics for the social sciences*. W. W. Norton & Company. New York, NY.

Bromiley, P. 2005. Chapters 1 and 5. in *The Behavioral Foundations of Strategic Management*. Blackwell Publishing. Malden, MA. (Useful to read as a follow up for the class discussion).

Discussion questions:

1. What is your view on doing research? What are your preferred approaches?
2. To what extent do the readings support, extend, or challenge your preconceived notions about doing research?
3. What are the challenges of doing strategy research? Please relate to our introductory discussion (first meeting) and associated readings.
4. What are the challenges of doing process research (in strategy and in general)?
5. Where do (good) new ideas come from?

Topic 3: Classics/OT

(Mostly: Third meeting):

Required readings:

Simon H. A. 1986. Rationality in Psychology and Economics. *The Journal of Business*. Vol. 59 (4), part 2. S209-S224.

Hannan, M. T. and J. Freeman, 1984. Structural inertia and organizational change. *American Sociological Review*, 49 (2), 149-164.

Selznick, P. 1996. Institutionalism "old" and "new", *Administrative Science Quarterly*, 41(2), pp. 270-277.

March JG. 1994. The evolution of evolution. In *"Evolutionary Dynamics of Organizations*, Baum JAC, Singh JV (eds.) Oxford University Press: New York; 39-49.

Chapters 1, 2, 3 in Aldrich H. and M Ruef 2006. ***Organizations Evolving***. Sage Publications Ltd. London UK.

Optional:

March JG. And Olsen, JP. 1984. The new institutionalism: Organizational factors in political science. ***The American Political Science Review***, Vol. 78 (3): 734-749.

Alvesson, M, and Spicer A, 2019: Neo-Institutional Theory and Organization Studies: A Mid-Life Crisis? *Organization Studies*, 40(2): 199-218.

Topic 4: Other behavioral and organizational foundations

(Mostly: Fourth meeting)

Required readings:

Chapters 2. 3. and 4. in Bromiley, P. 2005. ***The Behavioral Foundations of Strategic Management***. Blackwell Publishing. Malden, MA.

Chapter 1 and Epilogue in Baum, J. A. C. and F. Dobbin (Eds.). 2000. ***Economics Meets Sociology in Strategic Management. Advances in strategic management***. JAI Press Inc. Stamford, CT.

Nelson, R. R. and Winter, S. 1982. Chapters 1-5. ***An evolutionary theory of economic change***. Cambridge, MA: Harvard University Press.

Baum JAC and H. Rao, 2021. Evolutionary dynamics of organizational populations and communities. Chapter 18:427-495 in Poole, M. S. and Van de Ven, A.H. *Oxford Handbook of Organization Change and Innovation*, 2nd Edition, by Oxford University Press.

Jackson, W. A. 2019. Chapter 2. In *Markets: Perspectives from economic and social theory*. Routledge: London.

Optional:

King, B. G., T. Felin and D. A. Whetten. 2010. Finding the organization in organization theory: a Meta Theory of the organization as a social actor. ***Organization Science***, 21(1): 290-305.

Barnett W.P. and D. A. Levinthal. 2017. Special issue introduction: Evolutionary logics of strategy and organization. *Strategy Science*, 2(1): ii-vi.

Brunsson, N. 2019. In memoriam: James G. March. 40(2): 291-295.

Discussion questions for the third and fourth meetings

- What are the key concepts, ideas, and theories that can be extracted from the readings?
- What central questions of strategy can be addressed using the above?
- What are the key differences between the economic and behavioral foundations?
- How can the evolutionary approach inform strategic management?

- What are the key differences in emphasis between the psychology/decision making approaches and the sociological ones?
- Do you agree with Bromiley's assertion that behavioral assumptions are better suited to the central questions of the field of strategy?

Topic 5: What is strategy? / Models of strategy formation³

Fifth session

Required readings: a) The Harvard tradition

Porter, M. E. 1991. Towards a dynamic theory of strategy. *Strategic Management Journal*, 12, 95-117.

Porter, M. E. 1996. What is strategy? *Harvard Business Review*. 71 (6): 61-78.

Chapters 2,3,4 in Mintzberg, H. Ahlstrand, B. and J. Lampel; 1998. *Strategy Safari: A guided tour through the wilds of strategic management*. The Free Press, New York.

Rao, H. and Dutta, S. 2017. Why Great Strategies Spring from Identity Movements. *Strategy Science*. 3(1): 313-322.

Required readings: b) Learning, evolutionary and other traditions

Mintzberg H. 1978. Patterns in strategy formation. *Management Science*. 24(9): 934-948.

Burgelman, R.A. (1994). Fading memories: A process theory of strategic business exit in dynamic environments. *Administrative Science Quarterly*, 39(1), 24–56.

Mintzberg, H. Ahlstrand, B. and J. Lampel; 1998. Ch, 7. *Strategy Safari: A guided tour through the wilds of strategic management*. The Free Press, New York.

Optional:

Inkpen A. and N. Choudhury. 1995. The seeking of strategy where it is not: Towards a theory of strategy absence. *Strategic Management Journal*, 16 (4): 313-323.

Bowman E. H. and D. Hurry. 1993. Strategy through the option lens: An integrated view of resource investments and the incremental – choice process. *Academy of Management Review*, 18 (760-782).

Discussion questions

- What is strategy in your opinion? What are the distinctive features of “strategy”? What is not strategy?
- What are the key models of strategy formation? What are their key assumptions?
- What are the main differences between (and within) the Harvard and Learning traditions?
- Is strategy more a “structure” or an “action”?

³ A tentative special guest presentation on habits and routines around here

Topic 6: Strategic decision making/TMT

Required readings (a) SDM

Allison, G. T. and Zelikow, P. 1999. *The essence of decision: Explaining the Cuban Missile Crisis*. 2nd edition. Introduction, Conclusion, and **two** of the following consecutive chapters: (1,2), (3,4),(5,6).

Leiblein, M. J. Reuer, J. J. and T. Zenger. 2018. What makes a decision strategic? *Strategy Science* 3(4):558-573.

Suggested readings (a): SDM

Allison, G. T. and Zelikow, P. 1999. *The essence of decision: Explaining the Cuban Missile Crisis*. 2nd edition. (The entire book).

Bourgeois, L. J. III and K. M. Eisenhardt, 1988. Strategic decision processes in high velocity environments: four cases in the microcomputer industry. *Management Science*, 34 (7): 816-835.

Required readings (b) TMT

Hambrick, D.C. and P.A. Mason, 1984. Upper echelons: the organization as a reflection of its top managers. *Academy of Management Review*. 9: 195-206. Publications. Thousand Oaks, Ca.

Raffaelli, R., Glynn, M. A., & Tushman, M. 2019. Frame Flexibility: The Role of Cognitive and Emotional Framing in Innovation Adoption by Incumbent Firms. *Strategic Management Journal*.

Fox, B. C., Simsek, Z., & Heavey, C. (2021). Top Management Team Experiential Variety, Competitive Repertoires, and Firm Performance: Examining the Law of Requisite Variety in the 3D Printing Industry (1986-2017). Academy of Management Journal, (ja).

Agarwal, R., Braguinsky, S., & Ohyama, A. (2020). Centers of gravity: The effect of stable shared leadership in top management teams on firm growth and industry evolution. Strategic Management Journal, 41(3), 467-498.

Discussion questions:

- What are the distinguishing features of strategic decisions from other decisions, if any?
- What some of the sub processes are involved in strategic decision making?
- What are the key perspectives on strategic decision making?
- Does strategic decision making matter to performance? How?
- How can strategic decision making be improved?
- What are the distinctive features of top management teams? What is their strategic role?

Topic 7: Strategic Change, Persistence and Renewal

Required readings:

Quinn, J. B, 1980. Chapters 2 and 4 in *"Strategies for change: Logical incrementalism."* Irwin. Homewood Illinois.

Rumelt P. R. 1995. Inertia and transformation. Ch. 5 in “**Resource-based and evolutionary theories of the firm: Towards a synthesis**”. Montgomery C. A. Ed.). Kluwer academic publishing, Norwell, Ma.

Dalapiaz E. V. Rindova and D. Ravasi. 2016. Combining logics to transform organizational agency: Blending industry and art at Alessi. *Administrative Science Quarterly*, 61(3): 347-392.

Lungeanu, R., & Zajac, E. J. (2019). Thinking broad and deep: Why some directors exert an outsized influence on strategic change. Organization Science, 30(3), 489-508.

Suggested readings:

Baden-Fuller C. and J. M. Stopford. 1994. Ch.1, 3, 4, 6. In **Rejuvenating the mature business**. Harvard Business School Press. Boston, MA.

Agwaral, R. and C. E. Helfat. 2009. Strategic renewal of organizations. **Organization Science**. 20(2):281-293.

Jarzabkowski, P. 2008. Shaping strategy as a structuration process. **Academy of Management Journal**, 51(4): 621-650.

Vaara, E. and R. Whittington. 2012. Strategy-as-Practice. Taking Social Practices Seriously. The *Academy of Management Annals*, 6(1): 285-336.

Eggers, J. P. 2016. Reversing course: competing technologies, mistakes, and renewal in flat panel displays. *Strategic Management Journal*. 37: 1578-1596.

Discussion questions:

- What are the dimensions of strategic change?
- What are the main impediments and drivers for change?
- What are the main models of strategic change and persistence?
- How can the processes of strategic change and renewal be managed?

Topic 8: Strategy/Structure/Configurations and contradictions

Required readings:

Baum, J. A. C. and F. Dobbin (Eds.). 2000. Part I (pp. 29-78). **Economics Meets Sociology in Strategic Management. Advances in strategic management**. JAI Press Inc. Stamford, CT.

Chandler, A. D., Jr. 1962. Chapters 1, 8 and one of chapters 2. to 5. In **Strategy and Structure: Chapters in the History of the Industrial Enterprise**. Cambridge, MA: MIT Press.

Dacin T. and Amburgey, TL. 1994. As the left foot follows the right: The dynamics of strategic and structural change. **Academy of Management Journal**, 37(6): 1427- 1452.

Farjoun, M. and Peer Fiss. 2021. Thriving on Contradiction: Towards a Dialectical Alternative to Fit-Based Models in Strategy. Forthcoming. *Strategic Management Journal*

Kretschmer, T., Leiponen, A., Schilling, M., & Vasudeva, G. (2020). Platform ecosystems as meta-organizations: Implications for platform strategies. *Strategic Management Journal*.

Suggested readings:

Baum, J. A. C. and F. Dobbin (Eds.). 2000. Part I (pp. 79-115). ***Economics Meets Sociology in Strategic Management. Advances in strategic management***. JAI Press Inc. Stamford, CT.

Sytch, Maxim, Franz Wohlgezogen, and Edward J. Zajac. 2018. "Collaborative by Design? How Matrix Organizations See/Do Alliances." *Organization Science* 29, (6): 1130-1148.

Discussion questions:

- What is the basic strategy-structure model?
- What are some of the alternative interpretations and extensions of the basic model?
- What are the key differences between the economic and sociological perspectives on the strategy-structure relationship?
- What are the strengths and limitations of the configuration view?

Topic 9: Cognition, Learning and Interpretation

Required readings:

Levinthal, D. A. and March, J. G. 1993. The myopia of learning. *Strategic Management Journal*, 14 (special issue): 95-112.

Baum, J. A. C. and F. Dobbin (Eds.). 2000. Part I (pp. 16-17, 119-166). ***Economics Meets Sociology in Strategic Management. Advances in strategic management***. JAI Press Inc. Stamford, CT.

Joseph, J., & Wilson, A. J. (2018). The growth of the firm: An attention-based view. *Strategic Management Journal*, 39(6), 1779-1800.

Raffaelli, R. (2018). Technology reemergence: Creating new value for old technologies in swiss mechanical watchmaking, 1970-2008. *Administrative Science Quarterly*.

Pillai, S. D., Goldfarb, B., & Kirsch, D. A. (2020). The origins of firm strategy: Learning by economic experimentation and strategic pivots in the early automobile industry. *Strategic Management Journal*, 41(3), 369-399.

Augustine, G., Soderstrom, S., Milner, D., & Weber, K. (2019). Constructing a distant future: Imaginaries in geoen지니어ing. *Academy of Management Journal*, 62(6), 1930-1960.

Suggested readings:

Baum, J. A. C. and F. Dobbin (Eds.). 2000. Part I (167-199). ***Economics Meets Sociology in Strategic Management. Advances in strategic management***. JAI Press Inc. Stamford, CT.

Porac, J. F., H. Thomas, and C. Baden-Fuller, 1989. Competitive groups as cognitive communities: The case of Scottish knitwear manufacturers." *Journal of Management Studies*, 26: 397-416.

Porac, J. F., Ventresca, M. J. and Y. Mishina, 2002. Inter organizational cognition and interpretation. Ch. 25 in J. A. C. Baum (Ed.), *Companion to Organizations*. Blackwell Business.

Rindova, V. P. and C. J. Fombrun. 1999. Constructing Competitive Advantage: The role of firm-constituent interactions. *Strategic Management Journal*, 20(8): 691-710.

Smircich L. and C. Stubbart, 1985. Strategic Management in an enacted world. *Academy of Management Review*, 10(4): 724-736.

Discussion questions:

- How is strategy viewed from an interpretive worldview?
- What are the roles of interpretation and cognition in strategy, strategy making and strategic change?
- How can interpretation and cognition be linked to performance?
- How do interpretation and cognition change over time?
- What is the role of learning in strategy, strategy making, strategic change and performance?

Topic 10: Conceptions of Markets and Competitive Processes

Required readings:

Baum, J. A. C. and F. Dobbin (Eds.). 2000. Part I (pp. 309-350) in *Economics Meets Sociology in Strategic Management. Advances in strategic management*. JAI Press Inc. Stamford, CT. ;

Pfeffer J. and G. R. Salancik. 1978. Chapters 3 and 10 in *The external control of organizations: A resource Dependence Perspective*. Harper & Row, Publishers. New York.

Chapters 5-8. In Jackson, W. A. 2019. *Markets: Perspectives from economic and social theory*. Routledge: London.

Cole, B. M., & Chandler, D. (2019). A Model of Competitive Impression Management: Edison versus Westinghouse in the War of the Currents. *Administrative Science Quarterly*,

Hernandez, E., & Shaver, J. M. (2019). Network synergy. Administrative Science Quarterly, 64(1), 171-202.

Brattström, A., & Faems, D. (2020). Interorganizational relationships as political battlefields: How fragmentation within organizations shapes relational dynamics between organizations. Academy of Management Journal, 63(5), 1591-1620

Hsu, G., & Grodal, S. (2021). The double-edged sword of oppositional category positioning: A study of the US E-cigarette category, 2007–2017. Administrative Science Quarterly, 66(1), 86-132.

Kroezen, J. J., & Heugens, P. P. (2019). What is dead may never die: Institutional regeneration through logic reemergence in Dutch beer brewing. Administrative Science Quarterly, 64(4), 976-1019.

Suggested readings:

Baum, J. A. C. and F. Dobbin (Eds.). 2000. Part I (pp. 351-388) in ***Economics Meets Sociology in Strategic Management. Advances in strategic management***. JAI Press Inc. Stamford, CT.

Oliver C. 1991. Strategic responses to institutional processes. ***Academy of Management Review***, 16(1): 145-179.

Ahuja, Gautam, Laurence Capron, Michael Lenox, and Dennis A. Yao. 2018. "Strategy and the institutional envelope." *Strategy Science* 3(2): ii-x.

Fligstein, N., & McAdam, D. (2012). *A theory of fields*. Oxford University Press. (Chapter 1)

Discussion questions:

- What are the key behavioral conceptions of markets and competition?
- What do these conceptions add to the economic view of markets?
- What are the strategic implications of these conceptions?

Topic 11: Firm heterogeneity, shaping and sustained competitive advantage

Readings (required)

Review the introduction in Bromiley, P. 2005. ***The Behavioral Foundations of Strategic Management***. Blackwell Publishing. Malden, MA.

Baum, J. A. C. and F. Dobbin (Eds.). 2000. Part III (pp. 203-259) in ***Economics Meets Sociology in Strategic Management. Advances in strategic management***. JAI Press Inc. Stamford, CT.

Gavetti, G., Helfat, C. E., & Marengo, L. (2017). Searching, shaping, and the quest for superior performance. *Strategy Science*, 2(3), 194-209.

Garud, R., Kumaraswamy, A., Roberts, A., & Xu, L. (2020). Liminal movement by digital platform-based sharing economy ventures: The case of Uber Technologies. *Strategic Management Journal*.

Ocasio, W., Pozner, J. E., & Milner, D. (2020). Varieties of political capital and power in organizations: A review and integrative framework. *Academy of management annals*, 14(1), 303-338.

Cappellaro, G., Compagni, A., & Vaara, E. (2021). Maintaining strategic ambiguity for protection: Struggles over opacity, equivocality, and absurdity around the Sicilian Mafia. *Academy of Management Journal*, 64(1), 1-37

Pontikes, E. G., & Rindova, V. P. (2020). Shaping markets through temporal, constructive, and interactive agency. *Strategy Science*, 5(3), 149-159.

Readings: Suggested

Baum, J. A. C. and F. Dobbin (Eds.). 2000. Part III (pp. 261-305) in ***Economics Meets***

Sociology in Strategic Management. Advances in strategic management. JAI Press Inc. Stamford, CT.

Helfat et al, 2007. Chapter 1 in **“Dynamic capabilities”**. Oxford University Press.

Salvato, C. 2009. Capabilities unveiled: The role of ordinary activities in the evolution of product development processes. *Organization Science*, 20(2): 384-409.

Levinthal D. 1995. Strategic management and the exploration of diversity. Ch. 2 in **“Resource-based and evolutionary theories of the firm: Towards a synthesis”**. Montgomery C. A. (Ed.). Kluwer academic publishing, Norwell, Ma.

Carroll, G. R. 1993. A Sociological View on Why Firms Differ. ***Strategic Management Journal***, 14 (4) 237-249.

Discussion questions:

- What are the sources of firm diversity?
- Why does it matter?
- How can behavioral research contribute to answering these questions?
- What is the promise of dynamic capability research?

Topic 12: Emerging topics and course summary

General: In this final session we will:

1. Summarize the course
2. Discuss emerging research directions in strategy
3. Learn about some of the instructor's work in progress.
4. Potentially, visit the progress made on the final papers.

Readings: Specific readings (TBA) from this list are going to be discussed in class:

Powell, T.C. Lovallo, D. and C. Fox, 2011. Behavioral strategy, ***Strategic Management Journal***. 32(13): 1369-1523.

Powell, T.C. Neuropsychology. 2011. ***Strategic Management Journal***. 32(13): 1484-1499.

Gerard. G., Haas, M. and A. Pentland. 2014. Big Data and Management. *Academy of Management Journal*. 57 (2): 321-326.

Denrell, J. Fang, C. and C. Liu. 2015. Chance explanations in the management sciences. *Organization Science*.

Kahl, S. J. and S. Grodal. 2016. Discursive strategies and radical technological change: multilevel discourse analysis of the early computer (1947-1858). *Strategic Management Journal*, 37 (149-166).

Leavitt, K., Schabram, K., Hariharan, P., & Barnes, C. M. (2020). Ghost in the Machine: On Organizational Theory in the Age of Machine Learning. *Academy of Management Review*.

Farjoun, M. 2019. Strategy and Dialectics: Rejuvenating a long-standing relationship. *Strategic Organization*, 17(1): 133-144.

Course Change Proposal Form

Schulich School of Business

The following information is required for all course change proposals. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading). Provide evidence of consultation, where appropriate.

- 1. Responsible Program:** Schulich PhD Program
- 2. Responsible Unit:** Policy Area (renamed Strategic Management as of May, 1 2022)
- 3. Subject Code (Rubric) and Course Number:** PLCY 7020
- 4. Credit Value:** 3.00
- 5. Long Course Title:** Strategic Management Seminar II
- 6. Short Course Title:** Strategic Management Seminar II
- 7. Type of Course Change(s) (indicate all that apply):**

	in course number
	in credit value (provide course outline)
	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
	in integration (please provide statement of approval from relevant undergraduate coordinator or Chair)
	in cross-listing (please provide statement of approval from other program)
	in pre/co-requisite
	retire course
X	other (please specify) Change in the course code from PLCY to SGMT.

- 8. Effective Term/Calendar Year of Proposed Change(s):** Fall 2022

9. Rationale:

The PhD program in Policy (Strategic Management) currently has two required seminars in the Policy area:

PLCY 7010: Strategic Management Seminar I

PLCY 7020: Strategic Management Seminar II

Several years ago, the Policy area established three new PhD elective courses which used the course code SGMT. These electives are SGMT 7030, SGMT 7040, and SGMT 7050. The plan at the time was to switch the course code of our two core courses in the PhD program to SGMT as well (PLCY 7010 and PLCY 7020). Policy has become an outdated term in the field of strategic management. It was commonly used to refer to business policy, but the field has moved on and “strategic management” is now the more commonly used term. Given that the name of the Policy area is changing to Strategic Management on May 1, changing these course codes will also be better aligned with the area’s new name. This change adds clarity and better reflects the content of these courses.

There is no change to the content of the course, or any other aspect of this course.

10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
<p>Title</p> <p>PLCY 7020</p>	<p>Title</p> <p>SGMT 7020</p>

11. Enrolment Notes: N/A

12. Consultation: The instructors who teach this course and the PhD representative of the Policy/Strategic Management Area have been consulted and approve this change.

Originator:

Willow Sheremata
Signature

April 7, 2022
Date

Willow Sheremata
Name

Policy/Strategic Management
Area or Specialization

Approvals:

Area or Specialization

I have reviewed this change form and I support the proposed changes to the course.

Willow Sheremata
Signature

April 7, 2022
Date

Willow Sheremata
Name

Policy/Strategic Management
Area or Specialization

Degree Program:

I have reviewed this change form and I support the proposed changes to the course.

Eileen Fischer
Signature

May 9, 2022
Date

Eileen Fischer
Name of Program Director

PhD Program
Program

Program Committee:

This course change has received the approval of the relevant Program Committee.

Eileen Fischer

Signature

May 9, 2022

Date

Eileen Fischer

Name of Committee Chair

PhD Program Committee

Committee

Delete This section once form is complete.

Required Attachments:

- ☐ *For changes in the number of credits, course title or course description, please attach the Schulich course outline (which must conform to program norms; see the Program Assistant for details).*
- ☐ *For cross-listed / integrated courses, please include a signed statement of agreement from the director of the other graduate course / other degree program.*

Send to:

Send an electronic copy of all forms and attachments, and forward emails of support from other faculty members to the appropriate program committee secretary.

SGMT 7020: Economic Perspectives on Strategic Management



Economic Perspectives on Strategic Management Course Outline Fall Term 2020

**Thursday 2:00 – 5:00 pm
Zoom**

Professor: Anoop Madhok
Office hours: By appointment (Rm: N312; email: amadhok@schulich.yorku.ca)
Adm. Asst: Clara Kan
(Rm: N305; email: ckan@schulich.yorku.ca)

Course objectives and description

This introductory doctoral seminar surveys select perspectives in strategic management, with an orientation towards their economic foundations. Since the strategy field is rather broad, the streams of research covered are by no means meant to be exhaustive. The focus of the course is more on *conceptual/theoretical understanding* than on empirical investigation

The objective of the seminar is:

1. To familiarize the student more broadly with the strategic management field.
2. To expose the students to both some of the more classic and established work as well as the more current state-of-the-art in the theory and research in specific streams of strategic management research.
3. To help students develop the skills necessary to evaluate, critique, and contribute to the research in strategic management.

Pedagogy

The teaching of the course is discussion-based. Each class is organized around an assessment of the overall coherence and promise of the relevant theory as analyzed through its underlying arguments, assumptions, hypotheses as well as contributions to issues of central interest to economics and management.

For each class, there are some required readings (typically 4-5 articles). Select supplementary readings are additionally provided for you to deepen your knowledge of the material on an optional basis. As in any seminar, much of the responsibility for the

success of the class depends on you. It is expected that you will have read **all** the assigned material and are prepared to actively participate **meaningfully** (i.e., in a critical and constructive manner). "Meaningful" class participation refers to your contributing in a manner that adds value and enriches our discussion.

In preparation for your active participation in class, after completing each assigned reading (as well as set of readings) you should ask yourself the following two questions: Do I understand the theory and/or principles of this material? What are its implications and how would I take it forward further?

Organization

Individual presentations: Each student will present 1-2 (previously selected) article every class. You will have approximately 20-25 minutes to (a) introduce and provide an informative summarize of the article, highlighting key conceptual aspects; (b) identify the top 3 takeaways for you from the article; (c) focus on one (max 2) issue(s) that you found particularly engaging/intriguing, analyze it more thoughtfully and then engage with the author(s) on that issue in a meaningful way, i.e. extend, enhance, modify, qualify, challenge, rebut their argument and, finally, (d) formulate two questions that you would like to know more about, along with your thoughts on these.

- [What is the framing and positioning of the paper and what do you think of it?
- What are the key arguments and your opinion of them?
- What claims does the paper make regarding its contributions and your thoughts on these?
- What was your key learning/takeaway(s) from the article? What specific insights did you find particularly meaningful and why?
- If you were to put on a critical hat, how would you rebut/challenge/extend/modify etc the author(s)' argument(s)
- If you were interested in this this line of research, where would you take it next? What so far unasked (or insufficiently asked) research questions would you ask?]

Discussion leader: Each student will take on the role of discussion leader and make a presentation (approximately 30 minutes) 2-3 times over the course. For the discussion-cum-Q&A, you will approach the readings as an entire set *and engage with the broader topic of which they are a part*. You are encouraged and expected to use this opportunity to develop your knowledge on the topic further. Try not to limit yourselves to just the required readings and do additional readings to develop a more informed and comprehensive understanding of the topic. The discussion should end with presenting some of the recent developments of the theory/topic.

The broad criteria for evaluating the presentations and discussion are the quality, clarity and depth of the oral presentations as well as the capacity to answer questions.

Discussion leaders should:

- Demonstrate a good understanding of the overall topic
- Examine underlying commonalities/differences/complementarities among the articles
- Explore how they relate to, draw upon or build upon one another (or to prior research), key cumulative conclusions/contradictions, follow-on research questions that you can see from these papers that seem promising, etc.
- Demonstrate critical thinking regarding the topic
- Relate the topic to other topics covered in the course
- Create and maintain engagement among the participants
- Structure and manage the discussion within the allocated time
- Effectively use slides and other visual aids

Written assignments:

The ability to write thoughtfully and persuasively is an important part of doctoral training. You will have a number of written assignments of various types in addition to the term paper:

1. Several short (max two pages double-spaced) and some longer write-ups (max four pages double-spaced) on various questions/topics over the course (see the questions at the end of each session)
2. One additional write-up on the topic of a chosen session as discussion leader.
3. Review of one paper. The paper to be reviewed will be assigned during the course.

Note: The write-up should be sent to me by 6 am of the day of the class.

Term paper

You will also turn in a term paper (about 25 pages, double-spaced) after the end of the course. For first-year students, the paper can be a comprehensive literature review on a theory/phenomenon/research stream determined jointly with the professor, after taking into account the interests of the student. For more advanced students, the topic should be a more specific one chosen by the student but will require the approval of the professor.

The term paper should be written with the understanding that it will eventually be submitted for at least a major conference. Evaluation will be based, among other things, on the following:

- Did the paper must demonstrate a comprehensive knowledge of the relevant literature?

- Did the attempt to push this literature forward in a non-trivial manner?
- Did the paper ask interesting questions and propose a novel research idea or conceptual insights?
- Did the paper engage with select aspects of strategic management and economics theory in a salient manner?
- The quality of writing (clarity, organization, persuasiveness, coherence, etc).

NOTE: All written assignments are to be double-spaced and 12-pt font.

Timeline for paper:

First Meeting: Week 6. Each student would have written a paragraph on a topic of interest (a student can also come with an alternate topic) before the meeting. This will become the basis of the discussion during the meeting. It is advised that students do some preliminary research on the topic, including its relatedness to the course and learning value, so that an informed discussion can be had.

Second meeting: Week 8. Each student will have prepared a four-page (double-spaced) proposal, along an annotated bibliography* of about 15 sources. The meeting will determine the final deliverable and the next step towards the research project.

First complete draft: Week 12.

Paper presentation: Week 13. You will present the first completed draft of your paper in class and receive feedback from the others.

Final submission: Day 1 of the Winter term.

* For further details on annotated bibliography, please see

<http://advice.writing.utoronto.ca/types-of-writing/annotated-bibliography/>

Grading: The grading scheme is as follows

Participation-cum-discussion:	20%
Write-ups:	30%
Term paper:	50%

Class-by-Class Syllabus

The following list of lecture topics and readings indicate the material to be read for the various class sessions.

[Note: Additional readings are optional. They are provided to give you a flavour of some of the literature on the various topics].

1. Sep 10: Introduction and overview

Durand, R., R. Grant and T. Madsen. 2017. The expanding domain of strategic management research and the quest for integration. *Strategic Management Journal*, 38, 4-16.

Leiblein, M and J. Reuer. 2019. Foundation and futures of strategic management. *Strategic Management Review*, 1 (online publication)

Guerras L., A. Madhok and M. Angeles Montoro-Sanchez. 2014. The evolution of strategic management research: Recent trends and new directions. *Business Research Quarterly*, 2014, 17, 2, 69-76.

Ramos-Rodrigues, A. and J. Ruiz-Navarro. 2004. Changes in the structure of strategic management research. *Strategic Management Journal*, 25, 981-1004.
(Read from page 987 onward)

Nag, R., D. Hambrick and M.J. Chen. 2007. What is strategic management, really? *Strategic Management Journal*, 28, 935-956.

Assignment question: Where is strategy coming from, where has it been and where is it going?

Additional readings

Nerur, S.P., A. Rasheed and V. Natarajan. 2008. The intellectual structure of the strategic management field: An author co-citation analysis. *Strategic Management Journal*, 29, 319-336. (Just read pgs 330-333).

Rumelt, R., D. Schendel and D. Teece. 1991. Strategic management and economics. *Strategic Management Journal*, 12, Special Winter Issue, 5-28.

Rumelt, R. P., D.E. Schendel, and D.J. Teece. 1994. Fundamental issues in strategy. In R. Rumelt, D. Schendel, and D. Teece (Eds.) *Fundamental Issues in Strategy*. Boston, MA: HBS Press, Ch. 1, 9-47.

Hoskisson, R., M. Hitt, W. Wan and D. Yiu. 1999. Theory and research in strategic management: Swings of a pendulum. *Journal of Management*, 25, 417-56.

Pettigrew, A., H. Thomas and R. Whittington. 2002. Strategic Management: The strengths and limitations of a field. In A. Pettigrew, H. Thomas and R. Whittington (Eds) *Handbook of Strategy and Management*, London: Sage, Ch. 1, 3-30.

2. Sep 17: Perspectives on competition and strategy

Barney, J. 1986. Types of competition and the theory of strategy: Toward an integrative framework. *Academy of Management Review*, 11, 791-800.

Roberts, P.W. and K. Eisenhardt. 2003. Austrian insights on strategic organization: From market insights to implications for firms. *Strategic Organization*, 1, 345-352.

D'Aveni, R., G. Dagnino and K. Smith. 2010. The age of temporary advantage. *Strategic Management Journal*, 31, 13 (Special Issue), 1371-1385.

Venkatraman, N. and M. Subramaniam. 2002. Theorizing the future of strategy: Questions for shaping strategy research in the knowledge economy. In A. Pettigrew, H. Thomas and R. Whittington (Eds) *Handbook of Strategy and Management*, London: Sage, Ch. 20, 461-474.

Chen, M. 1996. Competitor analysis and interfirm rivalry: Toward a theoretical integration. *Academy of Management Review*, 21, 100-134.

Peng, M. 2009. The institution-based view as a third leg for a strategy tripod. *Academy of Management Perspectives*, 23, 63-81.

Assignment question: Based on the readings, what is the meaning of competition, competitiveness and competitive advantage to you?

Additional readings

Mathews, J. 2006. Ricardian rents or Knightian profits? More on Austrian insights on strategic organization. *Strategic Organization*, 4, 97-108.

Schumpeter, J. 1934. *The theory of economic development*. Harvard University Press: Cambridge, MA, Ch 7, 81-87.

Jacobson, R. 1992. The 'Austrian' school of strategy. *Academy of Management Review*, 17, 782-807.

? Madhok, A. and R. Marques. 2014. Towards an action-based perspective on firm competitiveness. *Business Research Quarterly*, 2014, 17, 2, 77-81.

3. Sep 24: The resource-based view and competitive advantage

Barney J. 1991. Firm resources and sustained competitive advantage. *Journal of Management*, 17, 99-120.

Peteraf, M. 1993. The cornerstones of competitive advantage: A resource-based view. *Strategic Management Journal*, 14, 179-192.

M. Peteraf and J. Barney. 2003. Unraveling the resource-based tangle. *Managerial and Decision Economics*, 24, 309-323.

Makadok, R. 2001. Toward a synthesis of the resource-based and dynamic-capability views of rent creation. *Strategic Management Journal*, 22, 387- 401. **(Read only introduction 387-391).**

Newbert, S.L. 2008. Value, rareness, competitive advantage, and performance: A conceptual-level empirical investigation of the resource-based view of the firm. *Strategic Management Journal*, 29, 745-768.

Assignment question: Go through the SMJ over the last five years. Write your assessment of the field as it currently stands and the direction in which it is evolving. What's trending/plateauing, both in terms of theory and phenomena? If you had to pursue a couple of areas of research, which would you choose and why? Please add some references selectively. (Max 4 pages).

Additional readings

Hoopes, D., T. Madsen and G. Walker. 2003. Why is there a resource-based view? Toward a theory of competitive heterogeneity. *Strategic Management Journal*, 24, 889-902. **(Read mainly till 897)**

Conner, K.C. 1991. A historical comparison of resource-based theory and five schools of thought within industrial organization economics: Do we have a new theory of the firm? *Journal of Management*, 17, 121-154.

Barney J. 1988. Strategic factor markets: Expectations, luck, and business strategy. *Management Science*, 32, 1231-1241.

Wernerfelt, B. 1984. A resource-based view of the firm. *Strategic Management Journal*, 5(2): 171-180.

Madhok, A., S. Li and R. Priem. 2010. The resource-based view reconsidered: Comparative firm advantage, willingness-based isolating mechanisms and competitive heterogeneity. *European Management Review*, 2010, 7, 91-100.

4. Oct 8: The resource-based view and competitive advantage: Questions, issues, challenges, extensions

Schmidt, J. and T. Keil. 2013. What makes a resource valuable? Identifying the drivers of firm-idiosyncratic resource value. *Academy of Management Review*, 38, 206-228.

Arend, R. J. 2006. Tests of the resource-based view: do the empirics have any clothes? *Strategic Organization*, 4, 409-422.

Kraaijenbrink, J., J.C. Spender and A. Groen. 2010. The resource-based view: A review and assessment of its critiques. *Journal of Management*, 36, 1, 349-372.

Alexy O., J. West, H. Klapper and M. Reitzig. 2017. Surrendering control to gain advantage: Reconciling openness and the resource-based view of the firm. *Strategic Management Journal*, 38, 1-24. (Skip the actual modeling)

Priem, R., J. Butler and S. Li. 2012. Toward reimagining strategy research: Retrospection and prospection of the 2011 AMR Decade Award article. *Academy of Management Review*, 38, 471-489.

Assignment question: Comment on/critique the critiques of the RBV and provide any additional critique of your own, if you have any. To you, is the DCV a theory, framework, perspective?

[Also, if you were Barney, how would you respond to Arend? To what extent has he done so through his 2003 article with Peteraf in *Managerial and Decision Economics*?]

Additional readings

Newbert, S.L. 2007. Empirical research on the resource-based view of the firm: An assessment and suggestions for future research. *Strategic Management Journal*, 28, 121-146. (**skim**)

Priem, R. and J. Butler. 2000. Is the resource-based “view” a useful perspective for strategic management research? *Academy of Management Review*, 26, 22-40.

Priem, R., S. Li and J. Carr. 2012. Insights and new directions from demand-side approaches to technology innovation, entrepreneurship and strategic management research. *Journal of Management*, 38, 346-374.

Barney, J., D. Ketchen and M. Wright. 2011. The future of resource-based theory: Revitalization or decline. *Journal of Management*, 37, 5, 1299-1315.

Armstrong, C. and K. Shimizu. 2007. A review of approaches to empirical research on the resource-based view of the firm. *Journal of Management*, 33, 6, 959-986.

5. Oct 15: Resources: Firm scope, diversification and growth

Lieberman, M, G. Lee and T. Folta. 2017. Entry, exit, and the potential for resource deployment. *Strategic Management Journal*, 38, 526-544.

Sakhartov, A. and T. Folta. 2014. Resource relatedness, redeployability and firm value. *Strategic Management Journal*, 35, 781-797. (skip the formal model)

Levinthal, D. and B. Wu. 2010. Opportunity costs and non-scale free capabilities: Profit maximization, corporate scope and profit margins. *Strategic Management Journal*, 31, 780-801. (skip formal model)

Penrose, E. 1959/1982. *The theory of the growth of the firm*. Oxford: Basil Blackwell. (Ch 2, 3; skim Ch 1)

Nason, R. and J. Wiklund. 2018. An assessment of resource-based theorizing on firm growth and suggestions for the future. *Journal of Management*, 44, 32-60. (skip the meta-analysis)

NOTE: Contrasts well with Newbert

Assignment question: Barney talks about firm resources underpinning a potential theory of competitive advantage whereas Penrose talks about firm resources underpinning the theory of the growth of the firm. Compare and contrast the Barney and Penrosean arguments. What is the difference between the two theories? Are the two theories truly distinct or do they have common underpinnings? Are the authors effectively talking about the same thing? In what ways do their arguments overlap? In which aspects are they compatible? In which ways contradictory? Should they be integrated and how? (Max 4 pages)

Additional readings

Helfat, C. and K. Eisenhardt. 2004. Intertemporal economies of scope, organizational modularity, and the dynamics of diversification. *Strategic Management Journal*, 25, 1217-1232.

Sakhartov, A. 2017. Economies of scope, resource relatedness, and the dynamics of corporate diversification. *Strategic Management Journal*, 38, 2168-2188. (skip the formal model)

Kor. Y and J. Mahoney. 2003. Edith Penrose's (1959) contribution to the resource-based view of strategic management. *Journal of Management Studies*, 41, 183-191.

6. Oct 22: The dynamic capabilities view and competitive advantage

Eisenhardt, K. and J. Martin. 2000. Dynamic capabilities: What are they? *Strategic Management Journal*, 21, 1105-1121.

Teece, D.J., G. Pisano, and A. Shuen. 1997. Dynamic capabilities and strategic management. *Strategic Management Journal*, 18, 509-533.

Teece, D.J. 2014. The foundations of enterprise performance: Dynamic and ordinary capabilities in an (economic) theory of firms. *Academy of Management Perspectives*, 28, 4, 328-352.

Arend, R. and P. Bromiley. 2009. Assessing the dynamic capabilities view: Spare change, anyone? *Strategic Organization*, 7, 75-90.

Helfat, C. and M. Peteraf. 2003. The dynamic resource-based view: Capability life cycles. *Strategic Management Journal*, 24, 997-1010.

Assignment question: Compare and contrast the Teece et al 1997 and the Eisenhardt and Martin treatment of dynamic capabilities. Are their arguments distinct? How compatible are they? How compatible are they with the RBV? Can/should they be integrated and why/how? What would such an integrated theory look like? Should your integrated theory be merged with the RBV and why/how? In what way would that deepen/extend/modify their treatment to enhance our understanding of competitive advantage and firm growth?

In response to the Arend and Bromiley, how would you respond:

1. If you were Teece
2. If you were Eisenhardt

Additional readings

Nelson, R. and S. Winter. 1982. *An evolutionary theory of economic change*. Cambridge, MA: Harvard University Press, Ch 2.

Teece, D. 2007. Explicating dynamic capabilities: The nature and microfoundations of (sustainable) enterprise performance. *Strategic Management Journal*, 28, 1319-1350.

? Helfat C. et al. 2009. *Dynamic capabilities: Understanding strategic change in organizations*. Wiley, Ch 1.

? Schilke, O., S. Hu and C. Helfat. 2018. Quo vadis, dynamic capabilities? A content-analytic review. *Academy of Management Annals*, 12, 1, 390-439.

Peteraf, M., G. di Stefano and G. Verona. 2013. The elephant in the room of dynamic capabilities: Bringing two diverging conversations together. *Strategic Management Journal*, 34, 1389-1410.

? Ethiraj, S.K., P. Kale, M. Krishnan and J. Singh. 2005. Where do capabilities come from and how do they matter? A study in the software services industry. *Strategic Management Journal*, 26, 25-46.

Dierickx, I. and K. Cool. 1989. Asset stock accumulation and sustainability of competitive advantage. *Management Science*, 35, 1504-1511.

Helfat, C. and M. Peteraf. 2003. The dynamic resource-based view: Capability lifecycles. *Strategic Management Journal*, 24, 997-2010.

Zollo M. and S. Winter. 2002. Deliberate learning and the evolution of dynamic capabilities. *Organization Science*, 13, 339-351.

7. Oct 29: Organizations and markets I: The transaction cost economics and agency perspectives

TCE

Williamson, O. E. 1991. Comparative economic organization: The analysis of discrete structural alternatives. *Administrative Science Quarterly*, 36, 269-296.

Cuypers, I., J-F Hennart, B. Silverman, and G. Ertug. 2020. Transaction cost theory: Past progress, current challenges, and suggestions for the future. *Academy of Management Annals*, in press.

Crook, T., J. Combs, D. Ketchen and H. Aguinis. 2013. Organizing around transaction costs: What have we learned and where do we go from here? *Academy of Management Perspectives*, 27, 63-79.

David, R. and S. Han. 2004. A systematic analysis of the empirical support for transaction cost economics. *Strategic Management Journal*, 25, 1, 39-58. **(skim)**

Agency theory

Alchian, A. and H. Demsetz, H. 1972. Production, information costs and economic organization. *American Economic Review*, 62: 777-795.

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Assignment question: Do some ‘sense-making’ of the various critiques/extensions of TC theory and add some critique of your own, if you have any.

Comment on Zenger, Felin and Bigelow

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- Grant, R. M. 1996. Toward a knowledge-based theory of the firm. *Strategic Management Journal*, 17, 109-122.
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Editors' comments: The future of organization theory. *Academy of Management Review*, 2020, 45 (2), 268-272.

Assignment question: Comment on Felin and Zenger's article. In particular, with respect to the implications for the theory of the firm, engage with and further develop the third and fourth set of questions.

11. Nov 26: New forms of organizing: Platforms and ecosystems

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Gawer, A. 2014. Bridging different perspectives on technological platforms: Towards an integrative framework. *Research Policy*, 43, 1239-1249.

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Assignment question: Please see Table 20.1 of the Venkatraman and Subramaniam article (Week 2). Arguably the proliferation and increasing prevalence of platforms and ecosystems in the digital economy this could be the onset of Era 4. What would such an era look like. Please develop and explain column 4 to represent this era.

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Gulati, R. 1998. Alliances and networks. *Strategic Management Journal*, 19, 293-318.

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Poppo, L. and T. Zenger 2002. Do formal contracts and relational governance function as substitutes or complements? *Strategic Management Journal*, 23, 707-725.

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13. Additional session: Special session on paper writing

Makadok, R., R. Burton and J. Barney. 2018. A practical guide for making theory contributions in strategic management. *Strategic Management Journal*, 39, 1530-1545.

Editors' comments: Sense and structure---The core building blocks of an *AMR* article, *Academy of Management Review*, 2017, 42, 407-416.

Series of seven Editors' Notes on 'Publishing in AMJ' from 2011, 42, 3 to 2012, 55, 2. (You can just skim these now or read them later)

References to other articles provided in class

+ PRESENTATIONS

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Garrido, E., J. Gomez, J. Maicas and R. Orcos. 2014. The institution-based view of strategy: How to measure it. *Business Research Quarterly*, 17, 82-101.

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Sarasvathy, S. 2001. Causation and effectuation: Toward a theoretical shift from economic inevitability to entrepreneurial contingency. *Academy of Management Review*, 26, 243-263.

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Eckhardt, J. and S. Shane. 2003. Opportunities and entrepreneurship. *Journal of Management*, 29, 333-349.

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Keyhani, M. 2014. *Entrepreneurial action and entrepreneurial rents*. PhD dissertation, Schulich School of Business, York University, Ch 1, pp 1-19.

4. Exploration-exploitation and strategic/organizational ambidexterity

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Holmström, B. and J. Roberts. 1998. The boundaries of the firm revisited. *Journal of Economic Perspectives*, 12(4): 73-94.

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Memo

To: Faculty Council, Schulich School of Business

From: David Johnston, Acting Program Director, MBAN and MMAI

Date: April 14 2022

Re: Non-Major Program Changes to the MMAI Program

There are three motions for consideration.

Motion 1: That Faculty Council approves changing the first term of the MMAI Program from the Fall to Summer term starting Summer 2023.

Motion 2: That Faculty Council approves the removal of the following 3 core courses from the MMAI program

1. MMAI 5300 3.0 Numerical Methods and Analysis
2. ORGS 6350 3.0 Managing Change
3. ORGS 6500 3.0 Interpersonal Managerial Skills

Motion 3: That Faculty Council approves the addition of the following 3 core courses to the MMAI program

1. MBAN 6110 3.0 Data Science I
2. MBAN 5110 3.0 Predictive Modelling
3. OMIS 6750 3.0 Project Management

Rationale Motion 1:

Having a one year graduate program that starts in May and ends by April of every year better synchronizes with the “hiring season” for our graduating business analysts as dictated by industry. It also gives our students a first term (i.e. Summer) during which they can become familiar with their new career path and be career coached before the hiring process begins in the Fall. In addition, this will make the synchronization of courses shared in common with the Master of Business Analytics (MBAN) program and other programs easier to staff and coordinate. The MBAN program currently starts in the Summer term.

This change will not require any changes to the MMAI program other than scheduling. The Fall 2022 cohort will be the last cohort to start in the Fall term.

Rationale Motion 2&3:

The Schulich School of Business is committed to having two, one year masters level graduate programs in analytics. The 12-year-old Masters of Business Analytics (MBAN) program produces business analysts for a broad cross section of organizations. The more recent 3-year-old Masters of Managing Artificial Intelligent (MMAI) program is more focused on the emerging application of artificial intelligence technologies and their management especially in business analytics. In short the MMAI overlaps the MBAN program but goes deeper into one field of practice in advanced analytics requiring a different allocation of program credit hours to provide the requisite learning.

In consultation with students, instructors and on reflection as to what MMAI students have been doing in their capstone projects for client organizations, we see some opportunities to streamline both programs by sharing common courses. This also makes the continuous revision of content required for this fast paced field of study easier by reducing the variety of courses covering similar topics in both the MBAN and MMAI programs. This requires removing some courses that are redundant or are not effective in supporting the learning objectives of the program and replacing them with others. The benefit to students is more time spent on a few key topics and less on peripheral topics or the repetition of content. This does not change the overall learning objectives of the MMAI program. All the changes in this motion involve required core courses.

To be clear, we are introducing no new courses but rather adding existing courses after we have removed other courses to make room. We then sequence the courses to fit into the existing structure of 3 terms and 45 credit hours to complete the program. There is no requirement for changes in prerequisites. The resequencing is necessary to better manage the cumulative learning from introductory to advanced concepts and theory to application. The end result is two programs that share 24 credit hours in common. The remaining 21 credits hours are unique to each program and differentiate one program from the other.

The proposed changes will result in the following breakdown of course shared in common and those that are different between MBAN and MMAI programs as described above:

Common to MBAN and MMAI (24 Credits)	
MMAI 5000	Artificial Intelligence Fundamentals
MMAI 5100	Database Fundamentals
MBAN 6110	Data Science I
MBAN 5110	Predictive Modelling
MBAN 5140	Visual Analytics And Modelling

OMIS 6750	Project Management
MGMT 6300	Case Analysis And Presentation Skills
PHIL 5340	Ethics And Societal Implications Of Artificial Intelligence
MMAI (21 Credits)	
MMAI 5040	Business Applications Of Artificial Intelligence I
MMAI 5090	Business Applications Of Artificial Intelligence II
MMAI 5400	Natural Language Processing
MMAI 5500	Applications Of Neural Networks And Deep Learning In Business
MMAI 5200	Algorithms For Business Analysis
MMAI 6050 (6.0 credits)	Artificial Intelligence Consulting Project (Over two terms)
MBAN (21 Credits)	
MBAN 6120	Data Science II
OMIS 6000	Models & Applications In Operational Research
3 MBA electives (9.0 Credits)	Chosen from an approved list
MBAN 6090 (6.0 Credits)	Analytic Consulting Project (Over two terms)

See Appendix 1 for current and proposed Curriculum Map.

Change to Graduate Program/Graduate Diploma Academic Requirements Proposal Form

Schulich School of Business

1. Graduate Program:

Master of Management in Artificial Intelligence

2. Effective Term/Calendar Year of Proposed Changes:

Summer 2023

3. Proposed Changes and Rationale:

Motion 1: That Faculty Council approves changing the first term of the MMAI Program from the Fall to Summer term starting Summer 2023.

Motion 2: That Faculty Council approves the removal of the following 3 core courses from the MMAI program

1. MMAI 5300 3.0 Numerical Methods and Analysis
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In consultation with students, instructors and on reflection as to what MMAI students have been doing in their capstone projects for client organizations, we see some opportunities to streamline both programs by sharing common courses. This also makes the continuous revision of content required for this fast paced field of study easier by reducing the variety of courses covering similar topics in both the MBAN and MMAI programs. This requires removing some courses that are redundant or are not effective in supporting the learning objectives of the program and replacing them with others. The benefit to students is more time spent on a few key topics and less on peripheral topics or the repetition of content. This does not change the overall learning objectives of the MMAI program. All the changes in this motion involve required core courses.

To be clear, we are introducing no new courses but rather adding existing courses after we have removed other courses to make room. We then sequence the courses to fit into the existing structure of 3 terms and 45 credit hours to complete the program. There is no requirement for changes in prerequisites. The resequencing is necessary to better manage the cumulative learning from introductory to advanced concepts and theory to application. The end result is two programs that share 24 credit hours in common. The remaining 21 credits hours are unique to each program and differentiate one program from the other.

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MGMT 6300	Case Analysis And Presentation Skills

PHIL 5340	Ethics And Societal Implications Of Artificial Intelligence
MMAI (21 Credits)	
MMAI 5040	Business Applications Of Artificial Intelligence I
MMAI 5090	Business Applications Of Artificial Intelligence II
MMAI 5400	Natural Language Processing
MMAI 5500	Applications Of Neural Networks And Deep Learning In Business
MMAI 5200	Algorithms For Business Analysis
MMAI 6050 (6.0 credits)	Artificial Intelligence Consulting Project (Over two terms)
MBAN (21 Credits)	
MBAN 6120	Data Science II
OMIS 6000	Models & Applications In Operational Research
3 MBA electives (9.0 Credits)	Chosen from an approved list
MBAN 6090 (6.0 Credits)	Analytic Consulting Project (Over two terms)

See Appendix 1 for current and proposed Curriculum Map.

4. Changes in Calendar:

Existing Graduate Program/Graduate Diploma Information (Change From):	Proposed Graduate Program/Graduate Diploma Information (Change To):
<p>Title: Master of Managing Artificial Intelligence</p> <p>The Graduate Program in Management in Artificial Intelligence (MMAI) is designed to prepare individuals to seek and obtain meaningful employment in artificial intelligence (AI)-related management positions, whether in private, public or non-profit organizations. AI-related fields include, but are not limited to: data science, machine learning, visualizations, natural language understanding, intelligent robotics, knowledge representation, reasoning and management, intelligent agents, human computer interfaces, and recommendation systems. This graduate program addresses a growing need in post-graduate management education for programs that train students in the tasks of designing, evaluating, refining and</p>	<p>Title: Master of Managing Artificial Intelligence</p> <p>The Graduate Program in Management in Artificial Intelligence (MMAI) is designed to prepare individuals to seek and obtain meaningful employment in artificial intelligence (AI)-related management positions, whether in private, public or non-profit organizations. AI-related fields include, but are not limited to: data science, machine learning, visualizations, natural language understanding, intelligent robotics, knowledge representation, reasoning and management, intelligent agents, human computer interfaces, and recommendation systems. This graduate program addresses a growing need in post-graduate management education for programs that train students in the tasks of designing, evaluating, refining and</p>

implementing practical AI related solutions and technologies. The degree focuses on strategic thinking, tactical decision making, design techniques and ethics in AI. The objective is to produce well-rounded managers who have the potential to become leaders in AI-management. The program achieves these objectives over the course of three terms and the completion of 45 credits, and is structured to facilitate the acquisition of AI and management knowledge and skills. A key component is the integration of the acquired knowledge through a capstone community-involved experiential learning project, the AI Consulting Project. This project takes place during the second and third terms. Please visit <http://schulich.yorku.ca> for more information.

ADMISSION REQUIREMENTS The minimum admission requirements are as follows: Applicants should possess an undergraduate degree from a recognized postsecondary institution with a minimum B+ average in the last two full years (or equivalent) of academic work. To be considered for admission to the MMAI program, applicants must have an undergraduate degree from a postsecondary institution in one of the following subjects: mathematics, business, computer science, economics, engineering or science. Successful applicants will have completed at least one university course on a listed topic, from at least two of the three categories below. Mathematics/Statistics w introductory statistics w calculus w data mining and machine learning w introduction to data science w linear algebra Computer Science w introduction to programming w introduction to data structures w algorithms w introduction to databases w data mining Business w business intelligence w data management

implementing practical AI related solutions and technologies. The degree focuses on strategic thinking, tactical decision making, design techniques and ethics in AI. The objective is to produce well-rounded managers who have the potential to become leaders in AI-management. The program achieves these objectives over the course of three terms and the completion of 45 credits, and is structured to facilitate the acquisition of AI and management knowledge and skills. A key component is the integration of the acquired knowledge through a capstone community-involved experiential learning project, the AI Consulting Project. This project takes place during the second and third terms. Please visit <http://schulich.yorku.ca> for more information.

ADMISSION REQUIREMENTS The minimum admission requirements are as follows: Applicants should possess an undergraduate degree from a recognized postsecondary institution with a minimum B+ average in the last two full years (or equivalent) of academic work. To be considered for admission to the MMAI program, applicants must have an undergraduate degree from a postsecondary institution in one of the following subjects: mathematics, business, computer science, economics, engineering or science. Successful applicants will have completed at least one university course on a listed topic, from at least two of the three categories below. Mathematics/Statistics w introductory statistics w calculus w data mining and machine learning w introduction to data science w linear algebra Computer Science w introduction to programming w introduction to data structures w algorithms w introduction to databases w data mining Business w business intelligence w data management

<p>w data Science for business w artificial intelligence for business w business analytics w work experience is not required, but internships or prior work experience is recommended; w demonstration of academic ability through high GMAT/GRE are recommended but not required; w proof of English language proficiency if prior studies were not completed in English: Test of English as a Foreign Language (iBT): 100 with minimum component scores of 23 or International English Language Testing System: 7.0 overall with minimum component scores of 6.5; w a supplementary application form that shows strong evidence of leadership ability; and, w two letters of recommendation, at least one of which should be from a professor.</p> <p>DEGREE REQUIREMENTS Students must successfully complete: w 45 credits of coursework, consisting of: w 39 credits from 13 required 3.0 credit courses and, w 6 credits from an experiential capstone project. All other requirements are identical to those of Schulich's other master's programs.</p> <p>PROGRAM ENTRY The MMAI program can be completed on a full-time basis. Entry is fall term.</p> <p>PROGRAM LENGTH The Graduate Program in Management in Artificial Intelligence is a three-term program</p>	<p>w data Science for business w artificial intelligence for business w business analytics w work experience is not required, but internships or prior work experience is recommended; w demonstration of academic ability through high GMAT/GRE are recommended but not required; w proof of English language proficiency if prior studies were not completed in English: Test of English as a Foreign Language (iBT): 100 with minimum component scores of 23 or International English Language Testing System: 7.0 overall with minimum component scores of 6.5; w a supplementary application form that shows strong evidence of leadership ability; and, w two letters of recommendation, at least one of which should be from a professor.</p> <p>DEGREE REQUIREMENTS Students must successfully complete: w 45 credits of coursework, consisting of: w 39 credits from 13 required 3.0 credit courses and, w 6 credits from an experiential capstone project. All other requirements are identical to those of Schulich's other master's programs.</p> <p>PROGRAM ENTRY The MMAI program can be completed on a full-time basis. Entry is summer term.</p> <p>PROGRAM LENGTH The Graduate Program in Management in Artificial Intelligence is a three-term program</p>
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MMAI Curriculum Map

MMAI Current Curriculum	MMAI Proposed Curriculum
Term I (Fall Term)	Term I (Summer Term)
MMAI 5000 3.0 Artificial Intelligence Fundamentals MMAI 5100 3.0 Database Fundamentals MMAI 5200 Algorithms for Business Analysis PHIL 5340 3.0 Ethics of AI MGMT 6300 3.0 Case Analysis and Presentation Skills	MMAI 5000 3.0 Artificial Intelligence Fundamentals MMAI 5100 3.0 Database Fundamentals MBAN 6110 3.0 Data Science I OMIS 6750 3.0 Project Management MGMT 6300 3.0 Case Analysis and Presentation Skills
Term II (Winter Term)	Term II (Fall Term)
MMAI 5040 3.0 Business Applications of Artificial Intelligence I MBAN 5140 3.0 Visual Analytics and Modelling MMAI 5300 3.0 Numerical Analysis ORGS 6350 3.0 Managing Change MMAI 6050 6.0 AI Consulting Project	MMAI 5040 3.0 Business Applications of Artificial Intelligence I MBAN 5110 3.0 Predictive Modelling MMAI 5400 3.0 Natural Language Processing MMAI 5500 3.0 Applications of Neural Networks and Deep Learning in Business MMAI 6050 6.0 AI Consulting Project
Term III (Summer Term)	Term III (Winter Term)
MMAI 5090 3.0 Business Applications of Artificial Intelligence II MMAI 5500 3.0 Applications of Neural Networks and Deep Learning in Business MMAI 5400 3.0 Natural Language Processing ORGS 6500 3.0 Interpersonal Managerial Skills MMAI 6050 6.0 AI Consulting Project	MMAI 5090 3.0 Business Applications of Artificial Intelligence II MMAI 5200 Algorithms for Business Analysis MBAN 5140 3.0 Visual Analytics and Modelling PHIL 5340 3.0 Ethics of AI MMAI 6050 6.0 AI Consulting Project

Legend:

Courses removed: ~~strikethrough/red font~~

Courses Added: **Bold/yellow highlight**

Courses moved or edited: ~~strikethrough/underlined/green highlight~~

Minor Course Change MMAI Program 4

The following information is required for all course change proposals at the undergraduate and graduate level. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

1. Program

Schulich MMAI Program

2. Course Number and Credit Value

MBAN 6110

3. Course Title

a) Long Course Title

Data Science I

b) Short Course Title

Data Science I

4. Existing Pre-requisites/Co-Requisites

N/A

5. Type of Course Change (indicate all that apply)

	in course number
	in credit value (provide course outline)
	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
	in integration (provide statement of approval from other program)
	in cross-listing (provide statement of approval from other program)
	in pre/co-requisite
	expire course
X	other (please specify) Add as required course for MMAI Program

6. Effective Session of Proposed Change(s)

Summer 2023

7. Academic Rationale

Fulfills learn objectives of overall program introducing common advanced analytics techniques and their operationalization in software.

8. Proposed Course Information

Not relevant.

Existing Course Information (Change from)	Proposed Course Information (Change to)

9. Consultation

Following changes were made in consultation with OMIS area on March 18 2022.

Originator



Signature

April 19 2022

Date

David Johnston

Name

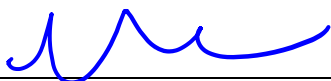
OMIS Area

Area or Specialization

Approvals:

Area or Specialization

I have reviewed this change form and I support the proposed changes to the course.



Signature

April 19, 2022

Date

M. Rungtusanatham

Name

OMIS

Area or Specialization

Degree Program

I have reviewed this change form and I support the proposed changes to the course.



Signature

April 19 2022

Date

David A. Johnston

Name of Program Director

MMAI

Program

Program Committee

This course change has received the approval of the relevant Program Committee.

Marcia Annisette

Signature

April 28, 2022

Date

Marcia Annisette

Name of Committee Chair

MPC

Committee

last updated: Aug 14 5:08am EDT.



MBAN6110 S2021 CREDITS: 3.00

MBAN 6110 M - DATA SCIENCE I

WED 08:30-11:30 N/A

Office Hours

Flexible arrangement of office hours by Skype id boris.garbuzov.

INSTRUCTOR

Boris Garbuzov

garbuzov@schulich.yorku.ca

416.736.2100 Ext. 55763



ADMIN

Denise Dunbar

denise1@schulich.yorku.ca

416.736.2100 Ext. 44681

G230MB

Assignment/Task Quantity % Weight Total % Author

Assignments	1	30	30	Group
Quizzes	8	2.5	20	Individual
Midterm	1	30	30	Individual
Final	1	20	20	Individual

100%

Brief Description: An introduction to data science techniques is designed for students who will work with data scientists or invest in related ventures. The course introduces fundamental concepts and techniques for the analysis of data-centered business problems, the creation and evaluation of solutions, the data science strategies, the basic cycle of a data analysis project, and the integration into business strategies. Prerequisite: MBAN student.

THIS COURSE IS OPEN TO STUDENTS IN THE MBAN PROGRAM ONLY

BRIEF DESCRIPTION

An introduction to data science techniques designed for students who will work with data scientists or invest in related ventures. The course introduces fundamental concepts and techniques for the analysis of data-centered business problems, the creation and evaluation of solutions, the data science strategies, the basic cycle of a data-mining project, and the integration into business strategies. Prerequisite: MBAN student .

COURSE LEARNING OUTCOMES

The Data Science I course prepares students for real working environments. Students who complete this course will be able to apply machine learning models, working in managerial and analytical roles. Particularly, the course teaches the students the basic classification and regression techniques, implementing them in Python programming. The group assignment will help the students to improve their communication skills.

LEARNING REMOTELY

Due to the COVID-19 situation, this course will run in an online format. All students are expected to have the following technology to participate in this course:

1. Computer
2. High speed internet
3. Web camera
4. Microphone

Students are responsible for ensuring they have the equipment needed and corresponding practices in place (e.g., ability to tether to hotspot in the event of an internet outage, data backup strategy in the event of computer failure) to ensure they can complete course requirements.

Several platforms will be used in this course (e.g., Canvas, Zoom, etc.) through which students will interact with the course materials, the instructor, as well as with one another. Please review the technical specifications for **Zoom** (<https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux>) and **Canvas** (<https://community.canvaslms.com/t5/Canvas-Basics-Guide/What-are-the-browser-and-computer-requirements-for-Canvas/ta-p/66>). Please review the syllabus to determine how the class meets (in whole or in part) and how presentations will be conducted. Students shall note the following:

- Zoom is hosted on servers in the U.S. This includes recordings done through Zoom.
- If you have privacy concerns about your data, provide only your first name or a nickname when you join a session.
- The system is configured in a way that all participants are automatically notified when a session is being recorded. In other words, a session cannot be recorded without you knowing about it.

Copying of any Zoom recordings or other course materials for public or commercial distribution is strictly prohibited and may lead to copyright and/or privacy law violations.

Technical Issues












Students who are unable to submit an assignment or exam due to technical issues with their computer, network connection or learning tools should immediately email a copy of their work to their instructor, and then complete and email a **Technical Issues Form** to their instructor. For Exams, please also review complete all requirements from the policy page of the syllabus.

COURSE MATERIAL

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
1. May 12 . Course administrative settings. Math and stat review.	<ul style="list-style-type: none"> • Solve quiz practice questions on math and stats 	Specified sections of free calculus, linear algebra and statistics books.	Prepare for quiz 1, solving quiz practice questions on math and stats review.
2. May 19 . Introduction to Python programming.	<ul style="list-style-type: none"> • Quiz 1 on math and stats review. 	Free Python tutorial.	Solve quiz practice questions on Python programming.
3. May 26 . Statistical learning. Classification metrics. Naïve Bayes classifier	<ul style="list-style-type: none"> • Quiz 2 on Python programming. 	Textbook chapter 2 “Statistical learning” up to Bayes classifier.	Prepare for quiz on statistical learning and Naïve Bayes classifier, solving the recommended problems of chapter 2.
4. June 2 . Statistical learning. KNN classifier	<ul style="list-style-type: none"> • Quiz 3 on classification precision and naïve Bayes classifier. 	Textbook chapter 2 “Statistical learning” from Bayes classifier to the end.	Prepare for quiz on statistical learning and Naïve Bayes classifier, solving the recommended problems of chapter 2.
5. June 9 . Simple linear regression	<ul style="list-style-type: none"> • Quiz 4 on statistical learning, KNN. • Assignment posted. 	<ul style="list-style-type: none"> • Textbook chapter 3 “Linear regression”, section 3.1. 	<ul style="list-style-type: none"> • Prepare for quiz on linear regression, solving the recommended problems of chapter 3. • Prepare for the midterm.
6. June 16 . Multiple linear regression.	Business cases: <ul style="list-style-type: none"> • Prediction of efficiency of advertisement through different channels (Tibshirani, p. 74). 	Textbook chapter 3 “Linear regression”	<ul style="list-style-type: none"> • Prepare for quiz on linear regression, solving the recommended problems of chapter 3.2-3.6. • Prepare for the midterm.

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
7. June 23. Midterm	Coverage: Chapters 2, 3.		Prepare for quiz on multiple linear regression. Start looking at the assignment posted.
8. June 30. Classification. Logistic regression	<ul style="list-style-type: none"> Quiz 6 on multiple linear regression Get acquainted with your team mates on a group assignment. Business cases: <ul style="list-style-type: none"> Probability of customer's default based on balance, income and student status. (Tibshirani, p. 131) 	Textbook chapter 4 "Classification". Sections 4.1-4.3.	Prepare for quiz on logistic regression, solving the recommended slide problems.
9. July 7. Classification. Discriminant analysis	<ul style="list-style-type: none"> Quiz 7 on logistic regression. 	Textbook chapter 4 "Classification". Sections 4.4-4.6.	<ul style="list-style-type: none"> Prepare for quiz on discriminant analysis, solving the recommended slide problems. Work on group project.
10. July 14. Resampling methods.	Business cases: <ul style="list-style-type: none"> Auto data set. Prediction of fuel consumption (Tibshirani, p. 191). 	Textbook chapter 5 "Resampling methods".	<ul style="list-style-type: none"> Prepare for final, solving the practice problems in lecture slides. Work on group project.
11. July 21. Linear model selection and regularization		Textbook chapter 5 "Linear model selection and regularization".	<ul style="list-style-type: none"> Prepare for final, solving the practice problems in lecture slides. Work on group project.
12. July 28. Linear model selection and regularization.	Group project is due.	Textbook chapter 6 "Linear model selection and regularization". Sections 6.3-6.5.	Prepare for final, solving the recommended problems.

ASSIGNMENT SUMMARY

Assignment Task	Group Individual	Total % of Final Grade	Due Date
Weekly quizzes 20%			
Quiz 1. Math and stat review		2.5%	
Quiz 2. Statistics review and Python programming		2.5%	
Quiz 3. Classification metrics		2.5%	
Quiz 4. Naive Bayes and KNN classifiers		2.5%	
Quiz 5. Simple linear regression		2.5%	
Quiz 6. Multiple linear regression		2.5%	
Quiz 7. Logistic regression		2.5%	
Quiz 8. Discriminant analysis		2.5%	
Midterm 30%			
Midterm		30%	
Assignment 30%			
Logistic regression classification project		30%	Sun Jul 25, 2021 at 11:59pm EDT
Final 20%			
Final		20%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Quiz 1. Math and stat review

Summary of instructions that the students will read before the quiz starts.

Quiz 2. Statistics review and Python programming

Quiz 3. Classification metrics

Quiz 4. Naive Bayes and KNN classifiers

Quiz 5. Simple linear regression


Quiz 6. Multiple linear regression

Quiz 7. Logistic regression

Quiz 8. Discriminant analysis

Midterm

Logistic regression classification project

 **Due Date:** Sun Jul 25, 2021 at 11:59pm EDT**ds1 assignment setting.docx**  (https://schulich.instructure.com/courses/5264/files/491303/download?download_frd=1)

Final

GRADING SCHEME

A+	100%	to	90%
A	< 90%	to	85%
A-	< 85%	to	80%
B+	< 80%	to	75%
B	< 75%	to	70%
B-	< 70%	to	65%
C+	< 65%	to	60%
C	< 60%	to	55%
C-	< 55%	to	50%
F	< 50%	to	0%

CLASS-BY-CLASS SYLLABUS

Week 1. Administrative settings. Math and stat review.



Week 1. Course administrative settings. Math and stats review

Week 2. Introduction to Python programming



Week 2. Introduction to Python programming

Week 3. Statistical learning. Classification metrics.



Week 3. Statistical learning. Classification metrics.

Week 4. Statistical learning. Naïve Bayes classifier. KNN classifier



Week 4. Statistical learning. Naïve Bayes classifier. KNN classifier

Week 5. Simple linear regression



Week 5. Simple linear regression

Week 6. Multiple linear regression



Week 6. Multiple linear regression

Week 7. Midterm



Week 7. Midterm

Week 8. Classification. Logistic regression



Week 8. Classification. Logistic regression

Week 9. Classification. Discriminant analysis



Week 9. Classification. Discriminant analysis

Week 10. Resampling methods



Week 10. Resampling methods

Week 11. Linear model selection and regularization



Week 11. Linear model selection and regularization

Week 12. Linear model selection and regularization



Week 12. Linear model selection and regularization

Final Exam

Deliverables

These course materials are designed for use as part of this course at York University and are the property of the instructor unless otherwise stated. Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law.

Copying this material for distribution (e.g. uploading material to a commercial third-party website) may lead to a violation of Copyright law.

Minor Course Change MMAI Program 5

The following information is required for all course change proposals at the undergraduate and graduate level. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

1. Program

Schulich MMAI Program

2. Course Number and Credit Value

MBAN 5110

3. Course Title

a) Long Course Title

Predictive Modelling

b) Short Course Title

Predictive Modelling

4. Existing Pre-requisites/Co-Requisites

N/A

5. Type of Course Change (indicate all that apply)

<input type="checkbox"/>	in course number
<input type="checkbox"/>	in credit value (provide course outline)
<input type="checkbox"/>	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
<input type="checkbox"/>	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
<input type="checkbox"/>	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
<input type="checkbox"/>	in integration (provide statement of approval from other program)
<input type="checkbox"/>	in cross-listing (provide statement of approval from other program)
<input type="checkbox"/>	in pre/co-requisite
<input type="checkbox"/>	expire course
<input checked="" type="checkbox"/>	other (please specify) Add as required course for MMAI Program

6. Effective Session of Proposed Change(s)

Summer 2023

7. Academic Rationale

Fulfills learn objectives of overall program introducing common advanced analytics techniques and their operationalization in software.

8. Proposed Course Information

Not relevant.

Existing Course Information (Change from)	Proposed Course Information (Change to)

9. Consultation

Following changes were made in consultation with OMIS area on March 18 2022.

Originator



Signature

April 19 2022

Date

David Johnston

Name

OMIS Area

Area or Specialization

Approvals:

Area or Specialization

I have reviewed this change form and I support the proposed changes to the course.



Signature

April 19, 2022

Date

M. Rungtusanatham

Name

OMIS

Area or Specialization

Degree Program

I have reviewed this change form and I support the proposed changes to the course.



Signature

April 19 2022

Date

David A. Johnston

Name of Program Director

MMAI

Program

Program Committee

This course change has received the approval of the relevant Program Committee.

Marcia Annisette

Signature

April 28, 2022

Date

Marcia Annisette

Name of Committee Chair

MPC

Committee

last updated: Aug 21 12:08am EDT.



MBAN5110 S2021 CREDITS: 3.00

MBAN 5110 M - PREDICTIVE MODELLING I

🕒 FRI 08:30-11:30 🏠 N/A

INSTRUCTOR

Cristina Anton

✉ canton@schulich.yorku.ca

📞 416.736.2100 Ext. 44681

🏠 G229 MB

ADMIN

Denise Dunbar

✉ denise1@schulich.yorku.ca

📞 416.736.2100 Ext. 44681

🏠 G230MB

THIS COURSE IS OPEN TO STUDENTS IN THE MBAN PROGRAM ONLY

CRISTINA ANTON BIOGRAPHY

Cristina Anton is an Analytical Training Consultant at SAS Institute Canada. In her current role, Cristina delivers public and custom courses and workshops on topics ranging from programming to statistical theory and data mining. She has been an avid SAS user for over 10 years and has extensive experience in programming, data analysis and advanced analytics. Prior to joining SAS, Cristina worked as a programmer and analyst in the healthcare industry, managing projects and working alongside a team of data scientists to deliver complex analysis of clinical trials data. Cristina holds a MSc in Statistics from the University of Toronto.

BRIEF DESCRIPTION

This course provides the tools needed to build models from data sets, validate models, and make predictions. The course emphasises the SAS environment. Major areas for discussion include analysis of variance, regression, categorical data analysis, and predictive modelling. The course emphasizes both theory and practice, allowing students to use statistical theory for purposes of business case analysis. Corequisite: MBAN 5120 1.50

LEARNING REMOTELY

Due to the COVID-19 situation, this course will run in an online format. All students are expected to have the following technology to participate in this course:

1. Computer
2. High speed internet
3. Web camera
4. Microphone

Students are responsible for ensuring they have the equipment needed and corresponding practices in place (e.g., ability to tether to hotspot in the event of an internet outage, data backup strategy in the event of computer failure) to ensure they can complete course requirements.

Several platforms will be used in this course (e.g., Canvas, Zoom, etc.) through which students will interact with the course materials, the instructor, as well as with one another. Please review the technical specifications for **Zoom** (<https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux>) and **Canvas** (<https://community.canvaslms.com/t5/Canvas-Basics-Guide/What-are-the-browser-and-computer-requirements-for-Canvas/ta-p/66>). Please review the syllabus to determine how the class meets (in whole or in part) and how presentations will be conducted. Students shall note the following:

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- If you have privacy concerns about your data, provide only your first name or a nickname when you join a session.
- The system is configured in a way that all participants are automatically notified when a session is being recorded. In other words, a session cannot be recorded without you knowing about it.










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Technical Issues

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immediately email a copy of their work to their instructor, and then complete and email a **Technical Issues Form** to their instructor. For Exams, please also review complete all requirements from the policy page of the syllabus.

ASSIGNMENT SUMMARY

Assignment Task	Group Individual	Total % of Final Grade	Due Date
Assignments 20%			
Assignment 1: ANOVA		9.76%	Fri Jun 25, 2021 at 11:59pm EDT
Assignment 2: Regression		10.24%	Fri Jul 16, 2021 at 11:59pm EDT
Midterm 20%			
Midterm		20%	Fri Jul 2, 2021 at 11:30am EDT
Capstone Project 30%			
Capstone Project Approval		3%	Fri Jun 25, 2021 at 11:59pm EDT
Capstone Project Write-Up		9%	Fri Jul 23, 2021 at 09:00am EDT
Capstone Project Presentation		12%	Fri Jul 23, 2021 at 09:00am EDT
Capstone Project Peer-review		6%	Fri Jul 30, 2021 at 11:59pm EDT
Final Exam 20%			
Final Exam		20%	Fri Aug 6, 2021 at 12:00pm EDT
Participation 10%			
Participation		10%	Fri Aug 6, 2021 at 11:59pm EDT

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Assignment 1: ANOVA

 **Due Date:** Fri Jun 25, 2021 at 11:59pm EDT

Assignment Honour Statement: **A1 Honour Statement.pdf**  (https://schulich.instructure.com/courses/5341/files/515235/download?download_frd=1)

Assignment description: **A1 ANOVA.pdf**  (https://schulich.instructure.com/courses/5341/files/515232/download?download_frd=1)

Data: **ameshousing3.sas7bdat**  (https://schulich.instructure.com/courses/5341/files/488816/download?download_frd=1)

Please submit the following as your solution:

1. The answers to the questions along with any supporting evidence (plots, tables, ...) as a .pdf or .doc file
2. The complete program used to answer the questions as a .sas file
3. The log file of the program above as a .log or .html file
4. The signed and dated Academic Honour Statement

Additional instructions: **A1 Instructions and Examples.pdf**  (https://schulich.instructure.com/courses/5341/files/515233/download?download_frd=1)

Late Delivery:

Students will lose 5% of their assignment grade for every day the assignment is delayed.

Assignment 2: Regression

 **Due Date:** Fri Jul 16, 2021 at 11:59pm EDT

Assignment Honour Statement: **A2 Honour Statement.pdf**  (https://schulich.instructure.com/courses/5341/files/531049/download?download_frd=1)

Assignment description: **A2 Regression.pdf**  (https://schulich.instructure.com/courses/5341/files/531048/download?download_frd=1)

Data: **ameshousing3.sas7bdat**  (https://schulich.instructure.com/courses/5341/files/488816/download?download_frd=1)


Please submit the following as your solution:

1. The answers to the questions along with any supporting evidence (plots, tables, ...) as a .pdf or .doc file
2. The complete program used to answer the questions as a .sas file
3. The log file of the program above as a .log or .html file
4. The signed and dated Academic Honour Statement

Late Delivery:

Students will lose 5% of their assignment grade for every day the assignment is delayed.


Midterm

 **Due Date:** Fri Jul 2, 2021 at 11:30am EDT

Dear class,

This midterm was designed to test your knowledge of the material covered thus far. Please pay close attention to the points assigned to each question and answer accordingly. Once a question is answered, you are not permitted to go back and change your answer.


You will have 2 hours (120 minutes) to complete the midterm from the time you start. The midterm must be completed before 11:30 am.

For some of the questions, you will be required to consult the following file: **Midterm_SAS Output.pdf**  (https://schulich.instructure.com/courses/5341/files/526774/download?download_frd=1)


In the event that you have questions during the midterm, a Zoom meeting has been scheduled where you can drop by and ask me questions live.

Good luck!

Capstone Project Approval


 **Due Date:** Fri Jun 25, 2021 at 11:59pm EDT

Capstone Project Write-Up


 **Due Date:** Fri Jul 23, 2021 at 09:00am EDT


Capstone Project - Write-up.pdf  (https://schulich.instructure.com/courses/5341/files/537278/download?download_frd=1)

Capstone Project Presentation

 **Due Date:** Fri Jul 23, 2021 at 09:00am EDT


Capstone Project Peer-review

 **Due Date:** Fri Jul 30, 2021 at 11:59pm EDT

For this part of the capstone project, each group will be required to review the Capstone Project presentations of their peers. Each group will then complete one **Capstone Project - Peer-Review Rubric.docx**  (https://schulich.instructure.com/courses/5341/files/546336/download?download_frd=1) for every other group that presents.

Your submission will consist of 7 individual .doc/docx files and it is due on Friday, July 30th, 2021. Only one member from each group has to submit these files for the entire group.

Final Exam

 **Due Date:** Fri Aug 6, 2021 at 12:00pm EDT

Dear class,


This exam was designed to test your knowledge of all the material covered in Predictive Modeling I.

You will have 2.5 hours (150 minutes) to complete the final exam from the time you start. The exam must be completed before 12:00 pm EDT.

The exam consists of 55 marks in total, please pay close attention to the points distribution below and manage your time accordingly:

Section	Marks
Academic Integrity	1
True/False and Multiple Choice	10
Fill in the Blanks	10
Scenario	4
Regression	15
Logistic Regression	15

Once a question is answered, you are not permitted to go back and change your answer.


For some of the questions, you will be required to consult the following file: **Final_SAS Output.pdf**  (https://schulich.instructure.com/courses/5341/files/555152/download?download_frd=1)

In the event that you have questions during the exam, a Zoom meeting has been scheduled where you can drop by and ask me questions live.

Best of luck!

Cristina

Participation

 **Due Date:** Fri Aug 6, 2021 at 11:59pm EDT

GRADING SCHEME

A+	100%	to	90%
A	< 90%	to	85%
A-	< 85%	to	80%
B+	< 80%	to	75%
B	< 75%	to	70%
B-	< 70%	to	65%
C+	< 65%	to	60%
C	< 60%	to	55%
C-	< 55%	to	50%
F	< 50%	to	0%

CLASS-BY-CLASS SYLLABUS

Class 1 - Introduction and Fundamental Concepts

May 14/21

[Overview: Class 1](#)

Introduction, Course Requirements, and Course Overview

1. Fundamental Concepts
Descriptive Statistics

Read: Predictive Modeling I - Course Notes - Chapter 1 Section 1.1

Read: OpenIntro Statistics - Diez (2019) - Chapter 1, Chapter 2 Section 2.1

Class 2 - Fundamental Concepts

May 21/21

[Overview: Class 2](#)

1. Fundamental Concepts
Picturing Distributions

Read: Predictive Modeling I - Course Notes - Chapter 1 Section 1.2

Read: OpenIntro Statistics - Diez (2019) - Chapter 2 Section 2.1, Chapter 4

Class 3 - Fundamental Concepts

May 28/21

[Overview: Class 3](#)

1. Fundamental Concepts
Randomness and Probabilities

Read: OpenIntro Statistics - Diez (2019) - Chapter 3

Watch: OpenIntro Statistics Chapter 3: Probability videos

Watch: MIT Introduction to Probability, Lecture 1 videos

Class 4 - Fundamental Concepts

Jun 4/21

[Overview: Class 4](#)

Confidence Intervals
Hypothesis Testing

Read: Predictive Modeling I - Course Notes - Chapter 1 Section 1.3, 1.4

Read: OpenIntro Statistics - Diez (2019) - Chapter 5 (theory only)

Class 5 - Group Comparison

Jun 11/21

Overview: Class 5

Introduction

Student's t-test

Analysis of Variance

Read: Predictive Modeling I - Course Notes - Chapter 2

Read: OpenIntro Statistics - Diez (2019) - Chapter 7, Section 7.1, 7.3, 7.5

Class 6 - Group Comparison

Jun 18/21

Overview: Class 6

Randomized Block Design

Post-hoc Analysis

Interactions

Read: Predictive Modeling I - Course Notes - Chapter 2

Read: OpenIntro Statistics - Diez (2019) - Chapter 7, Section 7.1, 7.3, 7.5

Class 7 - OLS Regression

Jun 25/21

Overview: Class 7

Correlation

Ordinary Least Squares Regression

Read: Predictive Modeling I - Course Notes - Chapter 3

Read: OpenIntro Statistics - Diez (2019) - Chapter 8, Chapter 9 Sections 9.1 - 9.4

Class 8 - Midterm Exam

Jul 2/21

Overview: Class 8

Midterm Exam

Class 9 - OLS Regression

Jul 9/21

Overview: Class 9

Model Building

Influential Observations

Collinearity

Read: Predictive Modeling I - Course Notes - Chapter 3

Read: OpenIntro Statistics - Diez (2019) - Chapter 8, Chapter 9 Sections 9.1 - 9.4

Class 10 -
OLS
Regression

Jul 16/21

Overview: Class 10

Advanced Linear Regression

Deliverables

These course materials are designed for use as part of this course at York University and are the property of the instructor unless otherwise stated. Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law.

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Course Change Proposal Form

Schulich School of Business

The following information is required for all course change proposals. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading). Provide evidence of consultation, where appropriate.

1. Responsible Program:
Schulich MBA
2. Responsible Unit:
OMIS
3. Subject Code (Rubric) and Course Number:
MGMT6700
4. Credit Value:
3.00
5. Long Course Title:
Project Management
6. Short Course Title:
Project Management
7. Type of Course Change(s) (indicate all that apply):

X	in course number
	in credit value (provide course outline)
	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
X	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
	in integration (please provide statement of approval from relevant undergraduate coordinator or Chair)
	in cross-listing (please provide statement of approval from other program)
	in pre/co-requisite
	retire course
X	other (please specify) Course Rubric (proposed OMIS) & Add to MMAI as core

8. Effective Term/Calendar Year of Proposed Change(s):
Fall 2023

9. Rationale:

To improve the oversight of the course to the area that offers the course. The number changes because OMIS 6700 is already taken.

10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
<p>Course Number: MGMT-6700 3.00</p> <p>Long Course Title: Project Management</p> <p>Short Course Title: Project Management</p> <p>Calendar Description: This course covers the strategic, organizational and operational aspects of managing projects. Students learn to manage the technical, behavioral, political and cultural aspects of temporary groups performing unique tasks. Topics covered include: defining deliverables, formulating project strategy, effective group organization, and management, dynamically allocating resources, managing without authority and resolving conflict. Traditional cost and time management techniques are covered using contemporary software packages.</p> <p>Pre-requisites: None</p> <p>MBAN core</p>	<p>New Course Number: OMIS 6750 3.00</p> <p>New Long Course Title: Project Management</p> <p>Short Course Title: Project Management</p> <p>Calendar Description: This course covers the strategic, organizational and operational aspects of managing projects. Students learn to manage the technical, behavioral, political and cultural aspects of temporary groups performing unique tasks. Topics covered include: defining deliverables, formulating project strategy, effective group organization, and management, dynamically allocating resources, managing without authority and resolving conflict. Traditional cost and time management techniques are covered using Microsoft Office and open-source, free project management software.</p> <p>Pre-requisites: None</p> <p>MBAN core, MMAI core</p>

11. Enrolment Notes:
N/A

12. Consultation:

Originator:



Signature

March 15, 2022

David Elsner

Name

OMIS

Area or Specialization

Approvals:

Area or Specialization

I have reviewed this change form and I support the proposed changes to the course.



Signature

March 18, 2022

Date

M. Rungtusanatham

Name

OMIS

Area or Specialization

Degree Program:

I have reviewed this change form and I support the proposed changes to the course.

Ashwin Joshi

Signature

March 18, 2022

Date

Ashwin Joshi

Name of Program Director

MBA

Program

Program Committee:

This course change has received the approval of the relevant Program Committee.

Marcia Annisette

Signature

April 28, 2022

Date

Marcia Annisette

Name of Committee Chair

April 28, 2022

Committee

Course Outline Fall 2022

Adjunct Professor
David Elsner
G216
Tel: 647-998-1587
Email: delsner@schulich.yorku.ca
Office hours: by appointment arranged by email

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David Elsner is an Adjunct Professor at the Schulich School of Business in the OMIS specialization. He is also President of DHE Consulting and a Managing Partner at illuminaite, two firms specializing in consulting, advanced analytics, and AI to identify, analyze, and solve business problems. With over 20 years of experience as a consultant and executive, he has advised leading organizations across the globe.

An experienced consultant and lecturer, David provides analytical and professional classes to a wide range of academic programs and corporate clients. At Schulich, he teaches Data Visualization and Modelling, Project Management, and is the academic advisor for the MMAI and MBAN consulting projects.

David holds a BSc in Engineering, a BA in Economics, and an MBA in Strategy and Innovation from the University of Toronto.

He is also the Executive Director of the Yorkville Exotic Car Show and a Board Member for Melanoma Canada.

Brief Description

This course covers the strategic, organizational and operational aspects of managing projects. Students learn to manage the technical, behavioral, political and cultural aspects of temporary groups performing unique tasks. Topics covered include: defining deliverables, formulating project strategy, effective group organization, and management, dynamically allocating resources, managing without authority and resolving conflict. Traditional cost and time management techniques are covered using Microsoft Office and open-source, free project management software.

Prerequisite: None.

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Course Learning Outcomes

Students will learn the basic concepts of project management and using Microsoft Office and open-source, free project management software, will be exposed to several methods for project management. In addition, students will learn the organizational and interpersonal aspects of project management. At the end of the course students will have been provided with sufficient knowledge to operate effectively both as a project leader and as a member of a project team.

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

- Understand the need for a formal project management methodology
- Define project scope
- Estimate project budget and schedule
- Select and govern a project
- Manage a project team
- Develop a project plan using project management software
- Understand different organizational structures and how they impact project management

Organization of the Course

Today, project management techniques are used in virtually every industry ranging from the planning of a charitable fundraiser to the development of an e-commerce application. Articles in both Fortune and the Wall Street Journal have argued that project management is finding an increasing place in business. The editor of the International Journal of Project Management argues that “into the 21st century, project-based management will sweep aside traditional functional line management”. Project management techniques is as fundamental to the business toolkit as are knowledge of finance and accounting. This is particularly true in Information Technology where most applications development and implementations are treated as projects.

Pedagogy

This course is primarily a lecture-based course. Each student is expected to have read the assigned material for the lecture before class. They should be ready to discuss any of the material assigned for the prior week and the current week.

Unless prior arrangements have been made with the instructor, no late assignments will be accepted.

The lecture slides as well as this course outline and all other material needed for the class – except the book – can be accessed through the course’s Canvas site. The lecture slides will typically be posted before the lecture.

All deliverables will be individually assessed, except for the group projects (4 to 6 students per group). Students are expected to self-organize into groups of 4 to 6 students per group. Part of the group assignment will be a post project evaluation, which will be used as a factor for group and individual evaluation.

Deliverables at a Glance

In the table below, the impact of each task on your final grade for the course is indicated in the “% weight” column.

Assignment/Task	Quantity	% Weight	Total %	Author
Weekly Quizzes	8	3.125%	25%	Individual
Case Study Analysis	2	15%	30%	Individual
Group Discussions	8	1.875%	15%	Group
Group Project	1	30%	30%	Group
		TOTAL	100%	

Course Material

Required reading for this course includes the following book, which is available for purchase from the York University Bookstore (<http://bookstore.yorku.ca>):

Project Management: The Managerial Process, 8th edition, by Gray and Larson, McGraw-Hill, ISBN # 978-1-260-57043-4.

Course website

We will be using Canvas for all components of the course. This includes lecture slides, quizzes, assignments, and announcements, and any other course information and materials.

Copyright

Course materials, such as lectures, PowerPoint slides, tests, course notes, outlines, and similar materials, are protected by copyright. As creator of those materials the instructor(s) is the exclusive copyright owner. You may take notes and make copies of course materials for your personal use. However, you may not reproduce or distribute the course materials (e.g., uploading that content to a commercial website) without my express written permission.

Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law. Copying this content for distribution may lead to a violation of Copyright law.

Instructional Methods

Each week, there will be a combination of live in-class lectures, eLearning modules with videos, readings, and videos. The in-class live lecture will be approximately 2.5-3.0 hours in length and begin at the start time for each class. The eLearning modules discuss weekly textbook questions and cases. The live lectures are mandatory. The eLearning modules are recommended as they form the basis of the weekly quizzes.

Also included each week are links to readings and videos from other sources. You should attend the in-class lectures and complete the eLearning first, because the readings and videos will reinforce the lessons in the lectures and depending on your comfort with the topic, you may be able to skim some of the sections of the readings and videos. This is especially true for the videos, as they are very useful but, in some cases, lengthy.

To encourage productive class discussions, it is essential that all students keep up with the lectures, eLearnings, readings and videos assigned in this class each week.

All students will be expected to participate each week in the online group discussions.

Student Preparation for Class and Class Participation: Expectations

Preparation. This course will consist of a combination of theory and practical application. Students are expected to keep up with the assigned readings and class discussions week to week. This is necessary for good class discussion and required to complete the various deliverables for the course.

Class Participation (contribution). Good participation is defined and measured as, "the consistent demonstration of good preparation and presentation of relevant thought about the readings, cases, and exercises". The emphasis is on quality not quantity. The sharing of experiences relevant to the topics being discussed is also appreciated where class time allows.

In the weeks where there is an online group discussion, we will begin the class by discussing and sharing what each group had discussed and review key details and solutions. Students are expected to participate and will be called upon to provide their perspective.

Attendance

Attendance is not participation. Your attendance is expected for the full duration of the class. That means being on time when the class starts and being there when it ends. If you feel that you have to miss a class or any part of a class, inform the instructor before the class.

The instructor will frequently randomly select people in class to contribute. At that time, they will be expected to be present and prepared. For some subjects, people will want to participate a lot. In these situations, you should be respectful of other's desires to participate and therefore be brief and have a relevant point that adds to the discussion.

Finally, since you are in a learning environment of an educational institution, you will NOT be penalized for giving a wrong answer or asking the wrong question. You are encouraged to ask questions when you do not understand an item, or to provide answers to questions asked even if you are not sure your answers are correct. The instructor will provide guidance where necessary for questions and answers.

Student Responsibilities

1. Be prepared for class. You should expect to be called upon in class to present your analysis and positions at any time.
2. Be on time for class. We need to use the full amount of time available without distracting interruptions from late arrivals and early departures.
3. Keep the instructor informed. Let the instructor know if you are having problems. Let the instructor know if you cannot attend class. You do not want to miss anything.
4. Identify yourself. Come to class with a readable name card. Identify all your work completely with student number and name. These actions will help the instructor to get to know you as an individual.
5. Check Canvas the day before class to make sure you are aware of any class announcements and to download any PowerPoint slides and other documents posted by the instructor.
6. Get the information directly from the instructor. If you have a question, contact the instructor directly. Avoid secondhand information from other and former students. First consult this course outline.
7. Electronic devices are allowed for the purpose of following course materials, taking notes and completing in class assignments. The instructor has the right to disallow electronic devices not being used for genuine class purposes.

Class-by-Class Syllabus

Topics, readings, and other preparations for every class are listed below.

Note: If any changes in this schedule become necessary during the duration of the course, an announcement will be posted on the course Canvas to notify students.

Lecture 1 – Introduction and Modern Project Management

Discussion:

- Introductions
- Course Overview
- Assignments
- What is a Project
- Modern Project Management
 - Agile Project Management
 - Current Drivers of Project Management
 - Project Management Today: A Socio-Technical Approach

Textbook:

- Chapter 1

Readings and Videos:

- What is Project Management | PMI
- Certified Associate in Project Management | CAPM (pmi.org)
- PMP Certification | Project Management Institute (pmi.org)
- The Future of Project Management [3m]

Assignments:

- Weekly Quiz 1

Lecture 2 – Organization Strategy, Project Selection, Structure and Culture

Discussion:

- Organization Strategy and Project Selection
 - Why Project Managers Need to Understand Strategy
 - The Strategic Management Process: An Overview
 - The Need for a Project Priority System
 - Project Classification
 - Phase Gate Model
 - Selection Criteria
 - Applying a Selection Model
 - Managing the Portfolio System
- Organization: Structure and Culture
 - Project Management Structures
 - Project Management Office (PMO)
 - What Is the Right Project Management Structure?
 - Organizational Culture
 - Implications of Organizational Culture for Organizing Projects

Textbook:

- Chapter 2 and 3

Readings and Videos:

- Strategy Session: Three Ways to Get Aligned
- Winning on Strategy — The Power of Project Delivery
- You really want to build that? The politics of project selection
- Project Selection Criteria – Videocast [8m]
- Creating a best practice project management culture
- A Roadmap to PMO Excellence
- Creating Sustainable Organizational Culture Change in 80 Days | Arthur Carmazzi | TEDxMaitighar [23m]
- Max's Minute: Project Management Culture [6m]

Assignments:

- Group Discussion 1
- Weekly Quiz 2

Lecture 3 – Defining the Project

Discussion:

- Defining the Project
 - Step 1: Defining the Project Scope
 - Step 2: Establishing Project Priorities
 - Step 3: Creating the Work Breakdown Structure
 - Step 4: Integrating the WBS with the Organization
 - Step 5: Coding the WBS for the Information System
 - Process Breakdown Structure

- Responsibility Matrices
- Project Communication Plan

Textbook:

- Chapter 4

Readings and Videos:

- Developing a complete project scope statement in 2 days
- The ABC basics of the WBS Paul Burek
- What is Project Scope? [4m]
- Create a Project Communication Plan | Google Project Management Certificate [37m]

Assignments:

- Group Discussion 2
- Case Study 1 assigned

Lecture 4 – Estimating Project Times and Costs

Discussion:

- Estimating Project Times and Costs
 - Factors Influencing the Quality of Estimates
 - Estimating Guidelines for Times, Costs, and Resources
 - Top-Down versus Bottom-Up Estimating
 - Methods for Estimating Project Times and Costs
 - Level of Detail
 - Types of Costs
 - Refining Estimates
 - Creating a Database for Estimating
 - Mega Projects: A Special Case

Textbook:

- Chapter 5

Readings and Videos:

- Leveraging the new practice standard for project estimating
- 7 Tips for estimating your projects
- The Ultimate Guide to Estimating Projects
- How to Estimate Your Project [4m]

Assignments:

- Group Discussion 3
- Weekly Quiz 3

Lecture 5 – Developing a Project Schedule

Discussion:

- Developing a Project Schedule
 - Developing the Project Network
 - From Work Package to Network
 - Constructing a Project Network

- Activity-on-Node (AON) Fundamentals
- Network Computation Process
- Using the Forward and Backward Pass Information
- Level of Detail for Activities
- Practical Considerations
- Extended Network Techniques to Come Closer to Reality

Textbook:

- Chapter 6

Readings and Videos:

- Learning Curve
- Driving politics out of project schedules
- Scheduling 101--the basic of best practices
- Project Scheduling [13m]

Assignments:

- Group Discussion 4
- Weekly Quiz 4
- Case Study 1 due

Lecture 6 – Managing Risk

Discussion:

- Managing Risk
 - Risk Management Process
 - Step 1: Risk Identification
 - Step 2: Risk Assessment
 - Step 3: Risk Response Development
 - Contingency Planning
 - Opportunity Management
 - Contingency Funding and Time Buffers
 - Step 4: Risk Response Control
 - Change Control Management

Textbook:

- Chapter 7

Readings and Videos:

- Risk management - the undiscovered dimension of project management
- Project success using no-nonsense risk management techniques
- Managing Risk
- Address Risk
- Perspectives on Managing Project Risk [38m]

Assignments:

- Group Discussion 5
- Weekly Quiz 5

Lecture 7 – Scheduling Resources and Costs and Resulting Project Duration

Discussion:

- Scheduling Resources and Costs
 - Overview of the Resources Scheduling Problem
 - Types of Resources Constraints
 - Classification of a Scheduling Problem
 - Resource Allocation Methods
 - Resource-Constrained Scheduling
 - Splitting Activities
 - Benefits of Scheduling Resources
 - Assigning Project Work
 - Multiproject Resource Schedules
 - Develop a Project Cost Baseline
- Reducing Project Duration
 - Rationale for Reducing Project Duration
 - Options for Accelerating Project Completion
 - Project Cost-Duration Graph
 - Practical Considerations
 - What IF Cost, Not Time, Is the Issue?

Textbook:

- Chapter 8 and 9

Readings and Videos:

- Fundamentals of scheduling & resource leveling
- Importance of Project Schedule and Cost Control in PM
- What the heck happened to my resources -- the multiple project dilemma
- Scheduling Resources on Multiple Projects [3m]
- Ways to improve performance on projects
- Project Crashing in Project Management
- The risks of outsourcing
- Pressure to Reduce Your Project Budget [6m]

Assignments:

- Group Discussion 6
- Weekly Quiz 6
- Case Study 2 assigned

Lecture 8 – Being an Effective Project Manager and Managing Project Teams

Discussion:

- Being an Effective Project Manager
 - Managing versus Leading a Project
 - Engaging Project Stakeholders
 - Influence as Exchange
 - Social Network Building
 - Ethics and Project Management
 - Building Trust: The Key to Exercising Influence
 - Qualities of an Effective Project Manager
- Managing Project Teams

- The Five-Stage Team Development Model
- Situational Factors Affecting Team Development
- Building High-Performance Project Teams
- Managing Virtual Project Teams
- Project Team Pitfalls

Textbook:

- Chapter 10 and 11

Readings and Videos:

- 10 traits of highly effective project managers
- The Power of Leadership Emotions
- Transformation—How to Manage Complexity
- A sixth sense for project management [16m]
- Leadership essentials for project management professionals (PMPs)
- Remote Reality Check: What's Next for Virtual Teams
- Stop Managing, Start Leading [18m]
- Building High Performance Teams [16m]

Assignments:

- Group Project assigned

Lecture 9 – Progress and Performance Measurement and Evaluation

Discussion:

- Progress and Performance Measurement and Evaluation
 - Structure of a Project Monitoring Information System
 - The Project Control Process
 - Monitoring Time Performance
 - Earned Value Management (EVM)
 - Developing a Status Report: A Hypothetical Example
 - Indexes to Monitor Progress
 - Forecasting Final Project Cost
 - Other Control Issues

Textbook:

- Chapter 13

Readings and Videos:

- Anatomy of an effective status report
- Measure Outcomes
- EVM for the rest of us
- How to Deliver Effective Project Cost Management [19m]

Assignments:

- Group Discussion 7
- Weekly Quiz 7
- Case Study 2 due

Lecture 10 – Project Closure

Discussion:

- Project Closure
 - Types of Project Closure
 - Wrap-up Closure Activities
 - Project Audits
 - Project Audits: The Big Picture
 - Post-implementation Evaluation

Textbook:

- Chapter 14

Readings and Videos:

- The Most Complete Project Closure Process You'll Ever Need
- Help! Your project has been selected for an audit--what now?
- Post-Implementation Reviews
- Project know-how

Assignments:

- Group Discussion 8
- Weekly Quiz 8

Lecture 11 – Agile Project Management

Discussion:

- Agile Project Management
 - Traditional versus Agile Methods
 - Agile PM
 - Agile PM in Action: Scrum
 - Extreme Programming and Kanban
 - Applying Agile PM to Large Projects
 - Limitations and Concerns
 - Hybrid Models

Textbook:

- Chapter 15

Readings and Videos:

- Introduction to Disciplined Agile® (DA™)
- Taking off the agile training wheels, advance agile project management using Kanban
- Team Agility / Scrum Support System
- Agile Project Management with Kanban | Eric Brechner | Talks at Google [64m]
- Introduction to Scrum [7m]

Lecture 12 – Presentations

Discussion:

- Presentations of Group Project

Assignments:

- Group Project Due

Written Assignments/Projects

Further details regarding course deliverables will be posted on the course Canvas site as the course unfolds. There may be minor adjustments to the schedule if required.

Unless prior arrangements have been made with the instructor, no late assignments will be accepted.

Weekly Quizzes | Value $8 \times 3.125\% = 25\%$ (Individual)

In most weeks, you will be required to complete a short online quiz in Canvas that will be based on that week's assigned modules and readings.

Each quiz will contain 12 matching, multiple choice, ordering, and true/false questions and will have a time limit of 15 minutes. The quiz is open book. Be prepared to answer the quiz questions by having your lecture slides and textbook open and easily accessible.

The quiz will be available from 9:00am – 5:00pm Eastern time on the day of class, one week after the module. You may start the quiz at any time during the eight-hour opening, at which time your 15 minutes begin.

The questions are randomized from a question bank, so no two quizzes will be identical. NOTE: You will only see a submission confirmation upon completion. Your responses, correct answers, and question feedback will be available the day after the quiz.

Case Study Analysis | Value $2 \times 15\% = 30\%$ (Individual)

The purpose of the case study analysis is to demonstrate that you can think through a real-life project management problem by applying the course learnings in a logical, professional, ethical, and informed manner.

The cases will be taken from the assigned textbook. Students will be given several questions to answer about the case.

Deliverable will be a report using Microsoft Word (or equivalent tool). You may also need to use ProjectLibre (or equivalent tool) to answer some of the questions. Max length: 3,000 words, supported by diagrams/or and screenshots (not including the executive summary).

Each case study is worth 15% of the final grade. The marking rubric will be in the module PPT in the week the case study is assigned.

Group Discussions | Value $8 \times 1.875\% = 15\%$ (Group)

There will be eight Group Discussions in this course, each marked out of 1.875 points. In your groups, students will be asked to discuss questions from a chapter Snapshot from Practice. Your contributions to the Group Discussions will consist of an original posting and a response to other students' postings. Each Group Discussion is open for five and a half days.

All students are expected to participate in the online discussions. Each week's discussion will be open on Canvas immediately following the weekly module (lecture). Your initial posts and responses must be posted in Canvas no later than the time identified in Canvas.

The instructor will refrain from commenting on a students' discussion posts. The hope is this will encourage students to think critically about the visualizations and the discussion rather than waiting to see what the "right" answer is from the instructor.

Group Project | Value 30% (Group)

Students will work in their groups to select a project to assess, plan, and execute.

Your work will consist of developing a detailed project plan using the appropriate project management content and techniques from class.

Deliverable will be:

- Report containing the detailed project plan.
- 20-minute group presentation of the report.

There are two objectives of this project. The first objective is to use all the content learned over the course to develop a complete end-to-end project plan for a real scenario. The second objective is to design and deliver an effective presentation to share the analysis, insights and recommendations to executives.

Complete project details and the marking rubric will be provided in the module PPT in the week the project is assigned.

General Academic Policies: Grading, Academic Honesty, Accommodations and Exams

Grades at Schulich MBA are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, elective courses are expected to have a mean grade between 5.2 and 6.2.

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor. For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

Academic honesty

Academic honesty is fundamental to the integrity of university education and degree programs and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found on the Schulich website: <http://schulich.yorku.ca/current-students/academic-honesty/>.

Quizzes (Absence from)

Students who miss an Exam must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file. Students who miss an Exam due to illness must have their doctor complete an "Attending Physician's Statement." For more details, see: <http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf>.

Accommodations

For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services. Students are advised to make the instructor aware of any accommodations required, so the instructor can provide those accommodations on a timely basis. For counseling and disability services, contact Student Services or see <http://www.yorku.ca/cds/>.

Memo

To: Faculty Council, Schulich School of Business

From: David Johnston, Acting Program Director, MBAN and MMAI

Date: April 14 2022

Re: Non-Major Program Changes to the MBAN Program

We are submitting the following motions for consideration.

Motion 1: Remove the following 3 required courses from the MBAN program

1. MBAN 5330 3.0 Big Data Fundamentals and Applications,
2. MBAN 6200 3.0 Realizing Value from AI and Analytics in Organizations
3. ORGS 6500 3.0 Interpersonal Managerial Skills

Motion 2: Add the following 3 courses as required to the MBAN program

1. MMAI 5100 3.0 Data Base Fundamentals
2. MMAI 5000 3.0 Artificial Intelligence Fundamentals
3. MGMT 6300 3.0 Case Analysis and Presentation Skills

Motion 3: That Faculty Council approves the change to rubric and course number for the MBAN core course MGMT 6700 3.00, to OMIS 6750 3.00.

Motion 4: That Faculty Council approves adding the following two electives to the MBAN program starting Summer 2023.

1. MKTG 5200 Marketing Management
2. FINE 5200 Managerial Finance

Rationale Motions 1&2:

The Schulich School of Business is committed to having two, one year masters level graduate programs in analytics. The 12-year-old Masters of Business Analytics (MBAN) program produces business analysts for a broad cross section of organizations. The more recent 3-year-old Masters of Managing Artificial Intelligent (MMAI) program is more focused on the emerging application of artificial intelligence technologies and their management. In short the MMAI overlaps the MBAN program but goes deeper into one field of practice in advanced analytics requiring a different allocation of program credit hours to provide the requisite learning.

In consultation with students, instructors and on reflection as to what MBAN students have been doing in their capstone projects for client organizations, we see some opportunities to streamline both programs by sharing common courses. This also makes the continuous revision of content required for this fast paced field of study easier by reducing the variety of courses covering similar topics. This requires removing some courses that are redundant or are not effective in supporting the learning objectives of the program and replacing them with others. The benefit to students is more time spent on a few key topics and less on peripheral topics or the repetition of content. This does not change the overall learning objectives of the MBAN program. All the changes in this motion involve required core courses.

To be clear, we are introducing no new courses but rather adding existing courses after we have removed other courses to make room. We then sequence the courses to fit into the existing structure of 3 terms and 45 credit hours to complete the program. The resequencing is necessary to better manage the cumulative learning from introductory to advanced concepts and theory to application. There is no requirement for changes in prerequisites. The end result is two programs that share 24 credit hours in common. The remaining 21 credits hours are unique to each program and differentiate one program from the other.

The proposed changes will result in the following breakdown of course shared in common and those that are different between programs as described above:

Common to MBAN and MMAI (24 Credits)	
MMAI 5000	Artificial Intelligence Fundamentals
MMAI 5100	Database Fundamentals
MBAN 6110	Data Science I
MBAN 5110	Predictive Modelling
MBAN 5140	Visual Analytics And Modelling
OMIS 6750	Project Management
MGMT 6300	Case Analysis And Presentation Skills
PHIL 5340	Ethics And Societal Implications Of Artificial Intelligence
MMAI (21 Credits)	
MMAI 5040	Business Applications Of Artificial Intelligence I
MMAI 5090	Business Applications Of Artificial Intelligence II
MMAI 5400	Natural Language Processing
MMAI 5500	Applications Of Neural Networks And Deep Learning In Business
MMAI 5200	Algorithms For Business Analysis
MMAI 6050 (6.0 credits)	Artificial Intelligence Consulting Project (Over two terms)
MBAN (21 Credits)	
MBAN 6120	Data Science II

OMIS 6000	Models & Applications In Operational Research
3 MBA eletives (9.0 Credits)	Mkting, Finance, Operations and/or Healthcare
MBAN 6090 (6.0 Credits)	Analytic Consulting Project (Over two terms)

See Appendix 1 for current and proposed Curriculum Map.

Rationale Motion 3:

- MGMT 6700 3.00 has been, and will likely continue to be, staffed and taught by faculty from the OMIS Area. As such, it makes more sense to identify the course with the area responsible for course content and staffing. This will also allow OMIS faculty members to monitor the course in order to respond to changing market competencies.
- The number changes because OMIS 6700 is already taken.

Rationale Motion 4:

Master of Business Analytics (MBAN) students are allowed to take three elective graduate level courses over the one year span of the program. One elective course in their 2nd term and two electives in their 3rd term. There is an approved list of elective courses offered outside of the MBAN and MMAI programs that give students choice in how they broaden their understanding of business and their management skills. Experience to date has indicated that not all courses are available every term therefore there is a need for an extensive list eligible courses. In addition, many of the 6000 level courses require 5000 level introductory courses as prerequisite. For some students with business degrees this is not a problem and the program director has been able to approve enrollment in most of the 6000 level courses on a case-by-case basis. For non-business students such as those with undergraduate degrees in engineering and math they may struggle in the 6000 level course with out the 5000 level course.

The intent of these changes will be enabled by emphasizing in the communication and coaching to students. That is, students wishing to take the range of Finance and Marketing courses on offer need to take one of the 5000 level courses as their first elective choice in 2nd term of the MBAN program to be eligible for the full range of 6000 level courses in their 3rd term. There is precedent for this in the ACTG 5100 Managerial Accounting course is already on the MBAN approved list.

Current Elective List	Proposed Elective List
ACTG 5210 -- Management Accounting	ACTG 5210 -- Management Accounting
ECON 6210 -- Economic Forecasting and Analysis	ECON 6210 -- Economic Forecasting and Analysis
FINE 6310 -- Econometrics of Financial Markets	<u>FINE 5200 – Managerial Finance</u>
FNSV 6700 -- Management of Risk in	FINE 6310 -- Econometrics of Financial Markets

Financial Institutions FNSV 6990 -- Enterprise Risk Management & Strategy MBAN 6500 -- Business Applications in AI MBAN 6510 -- Business Applications in AI II MKTG 6050 -- Marketing Research MKTG 6150 -- Consumer Behaviour MKTG 6250 -- Business Marketing MKTG 6300 -- Service Marketing MKTG 6360 -- Marketing Metrics OMIS 6350 -- Advanced Spreadsheet & Programming for Business OMIS 6560 -- Supply Chain Management OMIS 6955 -- Service Operations Management ORGS 6350 -- Managing Change ORGS 6560 -- Negotiations	FNSV 6700 -- Management of Risk in Financial Institutions FNSV 6990 -- Enterprise Risk Management & Strategy MBAN 6500 -- Business Applications in AI MBAN 6510 -- Business Applications in AI II <u>MKTG 5200 -- Marketing Management</u> MKTG 6050 -- Marketing Research MKTG 6150 -- Consumer Behaviour MKTG 6250 -- Business Marketing MKTG 6300 -- Service Marketing MKTG 6360 -- Marketing Metrics OMIS 6350 -- Advanced Spreadsheet & Programming for Business OMIS 6560 -- Supply Chain Management OMIS 6955 -- Service Operations Management ORGS 6350 -- Managing Change ORGS 6560 -- Negotiations
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Change to Graduate Program/Graduate Diploma Academic Requirements Proposal Form Schulich School of Business

1. Graduate Program:

Master of Business Analytics (MBAN)

2. Effective Term/Calendar Year of Proposed Changes:

Summer 2023

3. Proposed Changes and Rationale:

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MMAI (21 Credits)	
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See Appendix 1 for current and proposed Curriculum Map.

Rationale Motion 3:

- MGMT 6700 3.00 has been, and will likely continue to be, staffed and taught by faculty from the OMIS Area. As such, it makes more sense to identify the course with the area responsible for course content and staffing. This will also allow OMIS faculty members to monitor the course in order to respond to changing market competencies.
- The number changes because OMIS 6700 is already taken.

Rationale Motion 4:

Master of Business Analytics (MBAN) students are allowed to take three elective graduate level courses over the one year span of the program. One elective course in their 2nd term and two electives in their 3rd term. There is an approved list of elective courses offered outside of the MBAN and MMAI programs that give students choice in how they broaden their understanding of business and their management skills. Experience to date has indicated that not all courses are available every term therefore there is a need for an extensive list eligible courses. In addition, many of the 6000 level courses require 5000 level introductory courses as prerequisite. For some students with business degrees this is not a problem and the program director has been able to approve enrollment in most of the 6000 level courses on a case-by-case basis. For non-business students such as those with undergraduate degrees in engineering and math they may struggle in the 6000 level course with out the 5000 level course.

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Current Elective List	Proposed Elective List
ACTG 5210 -- Management Accounting ECON 6210 -- Economic Forecasting and Analysis	ACTG 5210 -- Management Accounting ECON 6210 -- Economic Forecasting and Analysis

<p>FINE 6310 -- Econometrics of Financial Markets</p> <p>FNSV 6700 -- Management of Risk in Financial Institutions</p> <p>FNSV 6990 -- Enterprise Risk Management & Strategy</p> <p>MBAN 6500 -- Business Applications in AI</p> <p>MBAN 6510 -- Business Applications in AI II</p> <p>MKTG 6050 -- Marketing Research</p> <p>MKTG 6150 -- Consumer Behaviour</p> <p>MKTG 6250 -- Business Marketing</p> <p>MKTG 6300 -- Service Marketing</p> <p>MKTG 6360 -- Marketing Metrics</p> <p>OMIS 6350 -- Advanced Spreadsheet & Programming for Business</p> <p>OMIS 6560 -- Supply Chain Management</p> <p>OMIS 6955 -- Service Operations Management</p> <p>ORGS 6350 -- Managing Change</p> <p>ORGS 6560 -- Negotiations</p>	<p><u>FINE 5200 – Managerial Finance</u></p> <p>FINE 6310 -- Econometrics of Financial Markets</p> <p>FNSV 6700 -- Management of Risk in Financial Institutions</p> <p>FNSV 6990 -- Enterprise Risk Management & Strategy</p> <p>MBAN 6500 -- Business Applications in AI</p> <p>MBAN 6510 -- Business Applications in AI II</p> <p><u>MKTG 5200 – Marketing Management</u></p> <p>MKTG 6050 -- Marketing Research</p> <p>MKTG 6150 -- Consumer Behaviour</p> <p>MKTG 6250 -- Business Marketing</p> <p>MKTG 6300 -- Service Marketing</p> <p>MKTG 6360 -- Marketing Metrics</p> <p>OMIS 6350 -- Advanced Spreadsheet & Programming for Business</p> <p>OMIS 6560 -- Supply Chain Management</p> <p>OMIS 6955 -- Service Operations Management</p> <p>ORGS 6350 -- Managing Change</p> <p>ORGS 6560 -- Negotiations</p>
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4. Changes in Calendar: None

Existing Graduate Program/Graduate Diploma Information (Change From):	Proposed Graduate Program/Graduate Diploma Information (Change To):

MBAN Curriculum Map & Elective List

MBAN Current Curriculum	MBAN Proposed Curriculum
Term I (Summer Term)	Term I (Summer Term)
MBAN 6200 3.0 Realizing Value from AI and Analytics in Organizations MBAN 5140 3.0 Visual Analytics and Modelling MBAN 6110 3.0 Data Science I MBAN 5330 3.0 Big Data Fundamentals & Applications <u>Elective I (MBA or MBAN electives)</u>	MMAI 5000 3.0 Artificial Intelligence Fundamentals MMAI 5100 3.0 Database Fundamentals MBAN 6110 3.0 Data Science I OMIS 6750 3.0 Project Management (moved from fall) MGMT 6300 3.0 Case Analysis and Presentation Skills
Term II (Fall Term)	Term II (Fall Term)
MBAN 5110 3.0 Predictive Modelling MGMT 6700 3.0 Project Management MBAN 6120 3.0 Data Science II MBAN 6090 6.0 Analytics Consulting Project <u>Elective II (MBA or MBAN electives)</u>	MBAN 5110 3.0 Predictive Modelling MBAN 6120 3.0 Data Science II MBAN 6090 6.0 Analytics Consulting Project OMIS 6000 3.0 Models & Applications in Operational Research (moved from winter) Elective I (MBA or MBAN electives) (moved from summer)
Term III (Winter Term)	Term III (Winter Term)
ORGS 6500 3.0 Interpersonal Managerial Skills OMIS 6000 3.0 Models & Applications in Operational Research GS/PHIL 5340 3.0 Ethics and Societal Implications of AI MBAN 6090 6.0 Analytics Consulting Project Elective III (MBA or MBAN electives)	MBAN 5140 3.0 Visual Analytics and Modelling (moved from summer) GS/PHIL 5340 3.0 Ethics and Societal Implications of AI MBAN 6090 6.0 Analytics Consulting Project Elective II (MBA or MBAN electives) (moved from summer) Elective III (MBA or MBAN electives)

Legend:

Courses removed: strikethrough/red font

Courses Added: Bold/yellow highlight

Courses moved or edited: strikethrough/underlined/green highlight

MBAN Curriculum Map & Elective List

Current Elective List	Proposed Elective List
<p>ACTG 5210 -- Management Accounting</p> <p>ECON 6210 -- Economic Forecasting and Analysis</p> <p>FINE 6310 -- Econometrics of Financial Markets</p> <p>FNSV 6700 -- Management of Risk in Financial Institutions</p> <p>FNSV 6990 -- Enterprise Risk Management & Strategy</p> <p>MBAN 6500 -- Business Applications in AI</p> <p>MBAN 6510 -- Business Applications in AI II</p> <p>MKTG 6050 -- Marketing Research</p> <p>MKTG 6150 -- Consumer Behaviour</p> <p>MKTG 6250 -- Business Marketing</p> <p>MKTG 6300 -- Service Marketing</p> <p>MKTG 6360 -- Marketing Metrics</p> <p>OMIS 6350 -- Advanced Spreadsheet & Programming for Business</p> <p>OMIS 6560 -- Supply Chain Management</p> <p>OMIS 6955 -- Service Operations Management</p> <p>ORGS 6350 -- Managing Change</p> <p>ORGS 6560 -- Negotiations</p>	<p>ACTG 5210 -- Management Accounting</p> <p>ECON 6210 -- Economic Forecasting and Analysis</p> <p><u>FINE 5200 -- Managerial Finance</u></p> <p>FINE 6310 -- Econometrics of Financial Markets</p> <p>FNSV 6700 -- Management of Risk in Financial Institutions</p> <p>FNSV 6990 -- Enterprise Risk Management & Strategy</p> <p>MBAN 6500 -- Business Applications in AI</p> <p>MBAN 6510 -- Business Applications in AI II</p> <p><u>MKTG 5200 -- Marketing Management</u></p> <p>MKTG 6050 -- Marketing Research</p> <p>MKTG 6150 -- Consumer Behaviour</p> <p>MKTG 6250 -- Business Marketing</p> <p>MKTG 6300 -- Service Marketing</p> <p>MKTG 6360 -- Marketing Metrics</p> <p>OMIS 6350 -- Advanced Spreadsheet & Programming for Business</p> <p>OMIS 6560 -- Supply Chain Management</p> <p>OMIS 6955 -- Service Operations Management</p> <p>ORGS 6350 -- Managing Change</p> <p>ORGS 6560 -- Negotiations</p>

Minor Course Change MBAN Program 4

The following information is required for all course change proposals at the undergraduate and graduate level. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

1. Program

Schulich MBAN Program

2. Course Number and Credit Value

MMAI 5100

3. Course Title

a) Long Course Title

Data Base Fundamentals

b) Short Course Title

Data Base Fundamentals

4. Existing Pre-requisites/Co-Requisites

N/A

5. Type of Course Change (indicate all that apply)

<input type="checkbox"/>	in course number
<input type="checkbox"/>	in credit value (provide course outline)
<input type="checkbox"/>	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
<input type="checkbox"/>	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
<input type="checkbox"/>	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
<input type="checkbox"/>	in integration (provide statement of approval from other program)
<input type="checkbox"/>	in cross-listing (provide statement of approval from other program)
<input type="checkbox"/>	in pre/co-requisite
<input type="checkbox"/>	expire course
<input checked="" type="checkbox"/>	other (please specify) Add as required course for MBAN Program

6. Effective Session of Proposed Change(s)

Summer 2023

7. Academic Rationale

Replaces an older course to fulfill the learning objectives in this content area with more current materials and approaches.

8. Proposed Course Information

Not relevant.

Existing Course Information (Change from)	Proposed Course Information (Change to)

9. Consultation

Following changes were made in consultation with OMIS area on March 18 2022.

Originator



Signature

April 19 2022

Date

David Johnston

Name

OMIS Area

Area or Specialization

Approvals:

Area or Specialization

I have reviewed this change form and I support the proposed changes to the course.



Signature

April 19, 2022

Date

M. Rungtusanatham

Name

OMIS

Area or Specialization

Degree Program

I have reviewed this change form and I support the proposed changes to the course.



Signature

April 19 2022

Date

David A. Johnston

Name of Program Director

MBAN

Program

Program Committee

This course change has received the approval of the relevant Program Committee.

Marcia Annisette

Signature

April 28, 2022

Date

Marcia Annisette

Name of Committee Chair

MPC

Committee

last updated: Dec 17 8:12am EST.



MMAI5100 F2021 CREDITS: 3.00

MMAI 5100 A - DATABASE FUNDAMENTALS

TUE 08:30 - 10:30 REMOTE

Office Hours

Virtual Office Hours: On Tuesdays (by appointment).

INSTRUCTOR

Altay Aksulu

aksulu@schulich.yorku.ca

416.736.2100 Ext. 44681

MB G229

ADMIN

Denise Dunbar

denise1@schulich.yorku.ca

416.736.2100 Ext. 44681

G230MB

Instructor Bio: Altay Aksulu, BSc (ITU), MBA & PhD (Schulich)

Altay's 28-year career as an engineer and an IT practitioner has spanned three continents and been peppered with numerous professional awards and recognition in Canada and abroad. He taught at both undergraduate and graduate levels at prestigious universities including Schulich School of Business involving technical as well as managerial topics which earned him multiple nominations to teaching excellence awards. Altay is a highly-cited researcher in the open source software realm and a public sector leader in Linux enterprise data center infrastructure. Presently, Altay spends most of his time provisioning and administering on premise and in cloud Linux servers, configuring and running data pipelines for data scientists and developing and maintaining business critical Python/Django applications that run on PostgreSQL databases.

Instructor's Note on the Course:

In this introductory course we will have an applied introduction to databases and their use in the business environment. I will assume no prior technical knowledge and start everything from ground up. The course will not only cover the theoretical fundamentals of database analysis and design but it will also provide a hands-on experience in designing and building databases using PostgreSQL DBMS software. We will look at the role of database systems, the relational database model, and entity-relationship diagrams among many other topics. We will also practice such applied skills as creating new databases around business requirements or connecting to existing databases and formulating queries using SQL (Structured Query Language). At the end of the course you will be able to design and build a fully operational relational database to support business decision making and operations. In addition to relational databases we will briefly look at NoSQL databases and their complementary use cases to relational databases as part of the course content. This course will equip you with the base knowledge so that you can continue learning databases independently. In addition to your own PostgreSQL object-relational database environment, you will also have access to a JupyterHub server as well as to a GitLab DevOps server as part of this course. Looking forward to a great learning experience for all.

THIS COURSE IS ONLY OPEN TO MMAI STUDENTS

BRIEF DESCRIPTION

Database Management Systems are computer-based systems used by organizations to manage the vast amount of data that accompany daily operations, support data analysis, and enable intelligent decision making. This course provides an applied introduction to database management systems and their use in the business environment. The course covers the fundamentals of database analysis and design.

COURSE LEARNING OUTCOMES

This course has six primary objectives, which will be introduced in class lectures and reinforced through labs, assignments and course textbook reading. Through class lectures, assignments, and labs, participants will gain knowledge of database management and be able to:

- Explain what is conceptual modeling and logical database design.
- Create an entity relationship diagram given a business description.
- Explain how to convert a conceptual model (entity-relationship diagram) into a working relational model.
- Explain the difference between first, second, and third normal form and be able to normalize a database.
- Be able to write SQL statements to build and manage databases (Data Definition Language), as well as manipulate existing data (Data Manipulation

Language).

-Explain and use various queries in SQL statements

The course will also briefly look at big data technologies like data lakes, NoSQL databases and the Hadoop ecosystem.

LEARNING IN THE REMOTE CLASSROOM

Due to the COVID-19 situation, this course will have an online component. All students are expected to have the following technology to participate in this course:

1. Computer
2. High speed internet
3. Web camera
4. Microphone

Students are responsible for ensuring they have the equipment needed and corresponding practices in place (e.g., ability to tether to hotspot in the event of an internet outage, data backup strategy in the event of computer failure) to ensure they can complete course requirements.

Several platforms will be used in this course (e.g., Canvas, Zoom, etc.) through which students will interact with the course materials, the instructor, as well as with one another. Please review the technical specifications for **Zoom** (<https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux>) and **Canvas** (<https://community.canvaslms.com/t5/Canvas-Basics-Guide/What-are-the-browser-and-computer-requirements-for-Canvas/ta-p/66>). Please review the syllabus to determine how the class meets and how presentations will be conducted.

Students shall note the following:

- Zoom is hosted on servers in the U.S. This includes recordings done through Zoom.
- If you have privacy concerns about your data, provide only your first name or a nickname when you join a session.
- The system is configured in a way that all participants are automatically notified when a session is being recorded. In other words, a session cannot be recorded without you knowing about it.

Copying of any Zoom recordings or other course materials for public or commercial distribution is strictly prohibited and may lead to copyright and/or privacy law violations.

Technical Issues

Students who are unable to submit an assignment or exam due to technical issues with their computer, network connection or learning tools should immediately email a copy of their work to their instructor, and then complete and email a **Technical Issues Form** to their instructor. For Exams, please also review and complete all requirements from the policy page of the syllabus.

Time Zone

All course meeting times are Eastern Time (ET) unless otherwise indicated.

Etiquette and Courtesy

Courtesy in the classroom is crucial to an effective learning environment. Think of a Zoom lecture as a face-to-face meeting and conduct yourself as you would if you were all present in the same room. Zoom is our virtual classroom and therefore appropriate classroom behaviour is expected. Below are some useful tips to help ensure the session goes smoothly for all involved:

- Join early – up to 5 minutes before the session start time because the class will start on time.
- Attend from a distraction-free and quiet environment (to the extent possible).
- Turn-on your camera unless you are experiencing connection issues or have other concerns with having your camera being on.
- Understand that your audio will be on mute upon entry. During class sessions, continue to mute your audio and try to use the chat feature to ask questions or share ideas to all (not as a private message). If you would like to use the chat box, remember that it is public and a record of the chat is kept and archived. Please ask your question once - the instructor will address questions periodically to avoid regular disruptions to the flow of the lecture.
- If your question in the chat box remains unanswered you can use the “Raise Hand” feature if you want to ask it verbally. Wait for the instructor to call your name and then unmute your audio to speak.
- For questions that remain unanswered at the end of the lecture please feel free to contact the instructor via e-mail.
- Minimize doing other things (e.g., texting, talking to others) as it detracts from your and others learning environment. Focus and be present
- Have paper and a pen or pencil handy to take notes.

Overall, please conduct yourselves with the professionalism, respectfulness and courtesy that would be expected of you as students at the Schulich.

Student Notice of Recording for Remote Teaching and Learning

Activities for this course may involve recording, in partial fulfillment of the course learning outcomes. Images, audio, text/chat messaging that have been recorded may be used and/or made available by the University to students enrolled in the course and those supporting the course for the purpose of materials review, for assessment, etc. Recordings will be managed according to the University's Common Record Schedule and will be securely destroyed when no longer needed by the University. Your personal information is protected in accordance with the York University's Policy on Access of Information and Protection of Privacy and the Freedom of Information and Protection of Privacy Act.

The University will use reasonable means to protect the security and confidentiality of the recorded information, but cannot provide a guarantee of such due to factors beyond the University's control, such as recordings being forwarded, copied, intercepted, circulated, disclosed, or stored without the University's knowledge or permission, or the introduction of malware into computer system which could potentially damage or disrupt the computer, networks, and security settings. The University is not responsible for connectivity/technical difficulties or loss of data associated with your hardware, software, or Internet connection.

By engaging in course activities that involve recording, you are consenting to the use of your appearance, image, text/chat messaging, and voice and/or likeness in the manner and under the conditions specified herein. In the case of a live stream recording, if you choose not to have your image or audio recorded, you may disable the audio and video functionality. If you choose to participate using a pseudonym instead of your real name you must disclose the pseudonym to your instructor in advance to facilitate class participation.

You are not permitted to disclose the link to/URL of an event or an event session recording or copies of recording to anyone, for any reason. Recordings are available only to authorized individuals who have been directly provided the above instructions/link for their use. Recordings for personal use, required to facilitate your learning and preparation of personal course/lecture notes, should not be shared with others without the permission of the instructor or event coordinator.

More information about accessibility can be obtained from Student Accessibility Services.

<https://currentstudents.yorku.ca/technology-protocol-for-students> (<https://currentstudents.yorku.ca/technology-protocol-for-students>)














COURSE MATERIAL

Text: Required reading for this course includes the following custom book.

Modern Database Management, 13th Edition, Jeffery A. Hoffer, Ramesh Venkataraman, and Heikki Topi, Pearson Education Inc., 2019. ISBN-13: 978-0-13-477365-0.

(the 12th Edition is also largely acceptable but misses some updates and new chapters)

ASSIGNMENT SUMMARY

Assignment Task	Group Individual	Total % of Final Grade	Due Date
Individual Research Assignment 20%			
Relational Databases and Database Tools		20%	Sun Nov 14, 2021 at 11:59pm EST
Group Assignment 30%			
Relational Database Design and Implementation		30%	Tue Dec 14, 2021 at 11:59pm EST
Participation and Discussion 10%			
Quizzes 40%			
Quiz 1		3.08%	Tue Sep 28, 2021 at 12:00pm EDT
Quiz 7		6.15%	Fri Nov 26, 2021 at 11:59pm EST
Quiz 2		3.08%	Tue Oct 5, 2021 at 12:00pm EDT
Quiz 3		3.08%	Tue Oct 12, 2021 at 12:25pm EDT
Quiz 8		3.08%	Fri Dec 10, 2021 at 11:59pm EST
Quiz 3_Alt		3.08%	
Quiz 6		3.08%	Wed Nov 10, 2021 at 02:00am EST
Quiz 4		3.08%	Tue Oct 19, 2021 at 01:45pm EDT
Quiz 7_Alt		6.15%	
Quiz 5		3.08%	Wed Nov 3, 2021 at 11:59am EDT
Quiz 9		3.08%	Fri Dec 10, 2021 at 11:59pm EST
Imported Assignments 0%			

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Relational Databases and Database Tools

In this individual research project you will have an in-depth look at a popular database and prepare a formal report of your findings. You will also record and submit a three-minute presentation focusing on the highlights of your report.

The specific database will be randomly assigned to you in one of the lectures.

To have consistency in reports and presentations please follow a standardized template for your research.

In particular, you are recommended to consider the following questions and organize your report/presentation around these headings/sections:

- What kind of a database is this database? (Refer back to the "Different kinds of databases..." discussion in Canvas)
- What is the history of this database? Is it a derivative of another database? When was it first released? What is the latest stable version? and so on...
- What specific business problems does this database address? (What is their sales pitch for best uses?)
- What kind of individuals or organizations (size, industry...) would most benefit from implementing this database? (Who is the target user?)
- On what technology platforms can this database be deployed? (e.g. Windows servers, Linux/UNIX servers, Mainframe, Hybrid, Public Cloud...)
- What kind of hardware/software or human resources would be needed to deploy and maintain this database?

- What kind of license does this database is made available under? Is there one time or on-going licensing costs involved? (And if so how much?)
- What features/functionality does the database provide?
- Provide a usability assessment for the database (you can either download and install this database and provide an assessment of your own or rely on existing reviews and reference them properly)
- Who are the main competitors for this database? How does it rank against its competition (think about functionality, usability, reliability, performance, and supportability)?
- Provide your own analysis of the best use cases for this database. See if you can think of business scenarios for which this database would be ideal. Give examples.
- Maximum length of the report: 5 pages
- Maximum duration of the presentation: 3 minutes.
- Preferred Presentation formats: .mp4, .avi, .mpeg-2

Your work will be evaluated on:

- The quality and professionalism of your report (both in organization structure and writing as well as on the quality of its content)
- The content and delivery of your short recorded presentation
- The quality and completeness of your references (academic and trusted professional references will be the most valuable. Please use APA style citations)
- The originality and completeness of your use case recommendations

Relational Database Design and Implementation

GroupCase.pdf  (https://schulich.instructure.com/courses/5869/files/605175/download?download_frd=1)

Quiz 1

This quiz includes multiple choice type questions.

There are 22 short questions on the quiz.

You will have 15 minutes to complete the quiz.

Quiz 7

 **Due Date:** Wed Nov 24, 2021 at 12:00pm EST

This quiz includes 15 SQL statement questions.

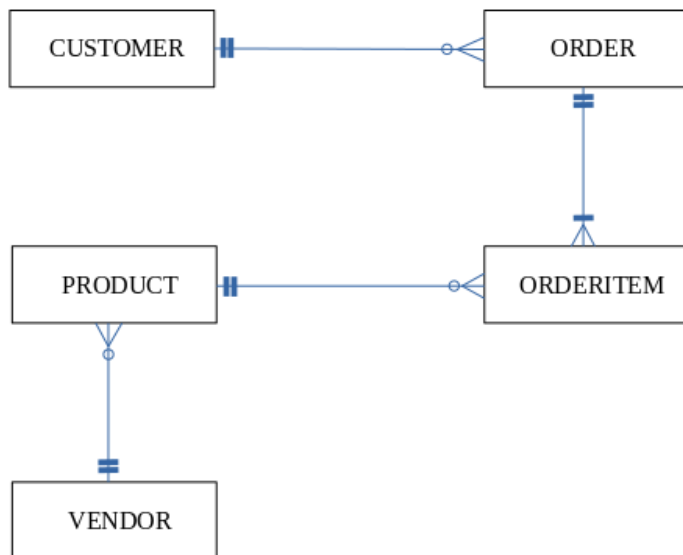
Once you start, you will have 2 hours to complete the quiz.

The questions are based on the database tables we used during our hands on sessions in class.

These tables were created using the CreateTable.sql and populated using the PopulateTables.sql scripts.

In case you have not followed through in class both scripts are available in your home directory on the PostgreSQL server (also in Canvas Week 9 Module under Week 9 Slides).

The following table structure should help you conceptualize the database entities and relationships between them.



Quiz 3_Alt

This quiz includes multiple choice type questions.

There are 25 short questions on the quiz.

You will have 20 minutes to complete the quiz.

Quiz 9

Due Date: Tue Dec 7, 2021 at 12:20pm EST

This quiz includes 16 multiple choice questions.

You will have 15 minutes to complete the quiz.

Quiz 2

This quiz includes multiple choice type questions.

There are 25 short questions on the quiz.

You will have 15 minutes to complete the quiz.

Quiz 5

This quiz includes 19 multiple choice and 1 fill in the blanks type questions.

You will have 15 minutes to complete the quiz.

Quiz 6

Due Date: Wed Nov 10, 2021 at 02:00am EST

This quiz includes 12 SQL statement questions.

You will have 2 hours to complete the quiz.

Quiz 4

This quiz includes multiple choice type questions.

There are 20 short questions on the quiz.

You will have 15 minutes to complete the quiz.

Quiz 3

This quiz includes multiple choice type questions.

There are 25 short questions on the quiz.

You will have 20 minutes to complete the quiz.

Quiz 8

 **Due Date:** Tue Nov 30, 2021 at 12:28pm EST

This quiz includes 23 multiple choice questions.

You will have 23 minutes to complete the quiz.

Quiz 7_Alt

This quiz includes 15 SQL statement questions. Do not answer questions you have answered earlier (first 4 questions).

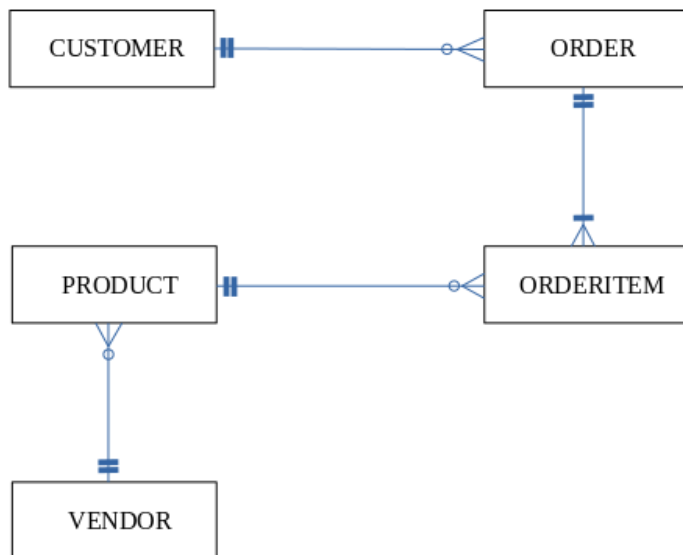
Once you start, you will have 2 hours to complete the quiz.

The questions are based on the database tables we used during our hands on sessions in class.

These tables were created using the CreateTables.sql and populated using the PopulateTables.sql scripts.

In case you have not followed through in class both scripts are available in your home directory on the PostgreSQL server (also in Canvas Week 9 Module under Week 9 Slides).

The following table structure should help you conceptualize the database entities and relationships between them.



CALCULATING COURSE GRADE

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor.





For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

GRADING SCHEME





A+	100% to 90%
A	< 90% to 85%
A-	< 85% to 80%
B+	< 80% to 75%
B	< 75% to 70%
B-	< 70% to 65%
C+	< 65% to 60%
C	< 60% to 55%
C-	< 55% to 50%
F	< 50% to 0%

CLASS-BY-CLASS SYLLABUS






Week 1

 Introduction to the Course
 Introduction to the Computing Environment
 Hands On Computing - Prep Session
 ZoomRecording - Week1
 Week1Slides




Week 2


 Introduction to Databases
 Hands On Computing - Session 1
 ZoomRecording - Week2
 Week2Slides

Week 3



 Conceptual Data Modeling – Basic Entity Relationship Model
 Hands On Computing - Session 2
 ZoomRecording - Week3
 Week3Slides
 Quiz 1

Week 4


 Conceptual Data Modeling - Basic Entity Relationship Model Examples
 Conceptual Data Modeling – Enhanced Entity Relationship Model
 Hands On Computing - Session 3

 ZoomRecording - Week4 Week4Slides Quiz 2


Week 5

 Individual Project Topics Logical Database Design – Relations and Normalization Hands On Computing - Session 4 ZoomRecording - Week5 Week5Slides Quiz 3_Alt Quiz 3

Week 6

 Logical Database Design – Relations and Normalization (Cont.) Physical Database Design Hands On Computing - Session 5 Group Project Case ZoomRecording - Week 6 Week6Slides Quiz 4

Week 7

 Reading Week



Week 8

 Introduction to SQL - Basic SQL
 Hands On Computing - Session 6
 ZoomRecording - Week 8
 Week8Slides
 InformalSurvey
 Quiz 5





Week 9

 Introduction to SQL - More Advanced SQL
 Hands On Computing - Session 7
 ZoomRecording - Week 9
 Week9Slides
 Relational Databases and Database Tools
 Quiz 6

Week 10







 More Advanced SQL (Cont.)
 Hands On Computing - Session 8
 ZoomRecording - Week 10
 Week10Slides

Week 11








 Advanced Database Topics - Data Warehousing
 Hands On Computing - Session 9
 ZoomRecording - Week 11
 Week11Slides

 Quiz 7

Week 12

 Online Course Evaluation
 Advanced Database Topics – Big Data and NoSQL Databases
 mongoDB in 5 minutes
 Hands On Computing - Session 10
 ZoomRecording - Week 12
 Week12Slides

Week 13

 Course Wrap-up
 NoSQL - mongoDB (cont).
 Data Analytics
 Relational Database Design and Implementation
 Week13Slides
 ZoomRecording - Week13
 Quiz 9

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

Lectures will have a significant interactive component. Your attendance is expected. It is recommended that you follow all lectures on your computer and participate in computing exercises (e.g. labs). Students will earn credit for active participation in course activities.

Readings from the text or supplementary materials will be assigned for each of the topics in the course. These are useful for preparation prior to lecture as well as to reinforce class concepts after each session.

Practice problems, where applicable, are selected exercises for you to work on to gain experience in each of the problem solving areas. They will not be graded. Problems and exercises at the end of each chapter in the assigned textbook as well as in-class exercises fall in this group. You may choose to do as many of these problems as you like, and may work on them individually or in groups. In order to maximize your learning, you should attempt the problem individually before working with others. While the suggested problems are a good reflection of the material covered in the course, they are not necessarily comprehensive, and students are encouraged to work on additional problems beyond those suggested.

Hands on computing opportunities that will be provided throughout the course (usually embedded in lectures) will help you put in practice the theoretical concepts discussed in the lecture portion of our sessions.

Weekly quizzes will test your learning and help you remember key concepts and issues. The quizzes will usually have true/false, multiple choice, code and short answer type 15-25 questions and will be administered after the class. Each week's topical knowledge will be tested the following week. Some of the quizzes may test your knowledge on previous weeks' content as well.

Class Participation (contribution)

Participating honestly in this academic community ensures that the York University degree that you earn will continue to be valued and respected as a true signifier of your individual work and academic achievement. All suspected cases of academic dishonesty will be investigated. If you have any questions as to what is and is not permitted, do not hesitate to contact the course instructor or your academic advisors. Potential offences include, but are not limited to:

In papers and assignments:

Using someone else's ideas or words without appropriate acknowledgement (i.e., citations).

Submitting your own work in more than one course without the permission of the instructor.

Making up sources or facts that are false (i.e., the claim is completely unsubstantiated).

Obtaining or providing unauthorized assistance on any assignment (this includes collaborating with others on assignments that are supposed to be completed individually).

On quizzes, test and exams:

Using or possessing any unauthorized aids (e.g., cell phone, graphing calculators).

Copying someone else's answers at any time during the exam.

Misrepresenting your identity or having another individual write your quiz, test or exam.

Submitting an altered quiz, test, exam or assignment for re-grading.

Misrepresentation:

Falsifying institutional documents, grades or university documentation (e.g., medical notes).

Late Assignments: Please note that all assignments are due at the date and time specified. The exact date and time will be given in the assignment and on the Canvas. Late work will not be accepted or be severely penalized. Exceptions will only be granted for medical and other serious emergencies. Please make every effort to let your instructor know in advance if your assignment is going to be late – use email. Supporting documentation will be required as per the (<http://undergradblog.schulich.yorku.ca/2012/12/04/exams-what-you-need-to-know/>) on missed tests and assignments.

Group Work: Groups of 5-7 students can work on a group assignment. Only one assignment per group should be submitted. Assignments will be submitted online via Canvas Groups can consist of students from other sections of the course (if applicable). However, the assignment must be submitted at the earliest designated due date amongst all group members or else the submission will not be accepted. Learning to work together in teams is an important aspect of your education and preparation for your future careers. That said, project-based teamwork is often new to students and you are therefore reminded of the following expectations with respect to behavior and contributions to your team project.

When working in a team, Schulich students are expected to:

Treat other members with courtesy and respect and honor the group ground rules.

Contribute substantially and proportionally to each assignment.

Ensure enough familiarity with the entire contents of the assignment so as to be able to sign off on it as original work and meet the assignment timeline as established by the team.

Resolving Group Conflicts: Conflicts are part of the team's process of learning how to work together effectively and when handled well, can generate creativity and bring multiple perspectives to the solution. Student teams are collectively expected to work through their misunderstandings as soon as they arise (and prior to submission of the final project). In cases where teams are unable to arrive at a solution that works for all members, the team must bring this to the attention of the instructor.

These course materials are designed for use as part of this course at York University and are the property of the instructor unless otherwise stated. Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law.

Copying this material for distribution (e.g. uploading material to a commercial third-party website) may lead to a violation of Copyright law.

Minor Course Change MBAN Program 5

The following information is required for all course change proposals at the undergraduate and graduate level. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

1. Program

Schulich MBAN Program

2. Course Number and Credit Value

MMAI 5000

3. Course Title

a) Long Course Title

Artificial Intelligence Fundamentals

b) Short Course Title

Artificial Intelligence Fundamentals

4. Existing Pre-requisites/Co-Requisites

N/A

5. Type of Course Change (indicate all that apply)

	in course number
	in credit value (provide course outline)
	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
	in integration (provide statement of approval from other program)
	in cross-listing (provide statement of approval from other program)
	in pre/co-requisite
	expire course
X	other (please specify) Add as required course for MBAN Program

6. Effective Session of Proposed Change(s)

Summer 2023

7. Academic Rationale

Replaces an older course to fulfill the learning objectives in this content area with more current materials and approaches. (i.e., MBAN 6200 Realizing Value from AI and Analytics In Organization)

8. Proposed Course Information

Not relevant.

Existing Course Information (Change from)	Proposed Course Information (Change to)

9. Consultation

Following changes were made in consultation with OMIS area on March 18 2022.

Originator



Signature

April 19 2022

Date

David Johnston

Name

OMIS Area

Area or Specialization

Approvals:

Area or Specialization

I have reviewed this change form and I support the proposed changes to the course.



Signature

April 19, 2022

Date

M. Rungtusanatham

Name

OMIS

Area or Specialization

Degree Program

I have reviewed this change form and I support the proposed changes to the course.



Signature

April 19 2022

Date

David A. Johnston

Name of Program Director

MBAN

Program

Program Committee

This course change has received the approval of the relevant Program Committee.

Marcia Annisette

Signature

April 28, 2022

Date

Marcia Annisette

Name of Committee Chair

MPC

Committee

last updated: Dec 17 8:12am EST.



MMAI5000 F2021 CREDITS: 3.00

MMAI 5000 A - ARTIFICIAL INTELLIGENCE FUNDAMENTALS

WED 08:30-10:30 REMOTE

INSTRUCTOR

Hjalmar Turesson

htouresson@schulich.yorku.ca

416.736.2100 Ext. 44681

G238 MB

ADMIN

Denise Dunbar

denise1@schulich.yorku.ca

416.736.2100 Ext. 44681

G230MB

THIS COURSE IS ONLY OPEN TO MMAI STUDENTS

BRIEF DESCRIPTION

This course introduces students to the field of artificial intelligence, with a focus on AI-driven business applications. It provides a historical perspective tracing the emergence of basic concepts of contemporary AI. Students learn key artificial intelligence techniques including knowledge representation and symbolic reasoning, biologically inspired approaches to AI, supervised, unsupervised and reinforcement learning, multi-agent systems and natural language processing.

LEARNING IN THE REMOTE CLASSROOM

Due to the COVID-19 situation, this course will have an online component. All students are expected to have the following technology to participate in this course:

1. Computer
2. High speed internet
3. Web camera
4. Microphone

Students are responsible for ensuring they have the equipment needed and corresponding practices in place (e.g., ability to tether to hotspot in the event of an internet outage, data backup strategy in the event of computer failure) to ensure they can complete course requirements.

Several platforms will be used in this course (e.g., Canvas, Zoom, etc.) through which students will interact with the course materials, the instructor, as well as with one another. Please review the technical specifications for **Zoom** (<https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux>) and **Canvas** (<https://community.canvaslms.com/t5/Canvas-Basics-Guide/What-are-the-browser-and-computer-requirements-for-Canvas/ta-p/66>). Please review the syllabus to determine how the class meets and how presentations will be conducted.

Students shall note the following:




















- Zoom is hosted on servers in the U.S. This includes recordings done through Zoom.
- If you have privacy concerns about your data, provide only your first name or a nickname when you join a session.
- The system is configured in a way that all participants are automatically notified when a session is being recorded. In other words, a session cannot be recorded without you knowing about it.

Copying of any Zoom recordings or other course materials for public or commercial distribution is strictly prohibited and may lead to copyright and/or privacy law violations.

Technical Issues


Students who are unable to submit an assignment or exam due to technical issues with their computer, network connection or learning tools should immediately email a copy of their work to their instructor, and then complete and email a **Technical Issues Form** to their instructor. For Exams, please also review and complete all requirements from the policy page of the syllabus.

ASSIGNMENT SUMMARY

Assignment Task	Group Individual	Total % of Final Grade	Due Date
Assignments 40%			
Assignment 1		14%	Wed Oct 13, 2021 at 08:30am EDT
Assignment 2		13%	Wed Nov 17, 2021 at 08:30am EST
Assignment 3		13%	Wed Dec 8, 2021 at 08:30am EST
Attendance 10%			
Class 1 quiz		0%	Fri Sep 17, 2021 at 11:59pm EDT
Class 2 quiz		0%	Thu Sep 23, 2021 at 11:00am EDT
Class 3 quiz		0%	Wed Sep 29, 2021 at 12:59pm EDT
Class 4 quiz		0%	Thu Oct 7, 2021 at 11:00pm EDT
Class 5 quiz		0%	Thu Oct 14, 2021 at 11:59pm EDT
Class 6 quiz		0%	Thu Oct 21, 2021 at 11:59pm EDT
Class 8 quiz		0%	Tue Nov 16, 2021 at 11:00pm EST
Class 9 quiz		0%	Thu Nov 18, 2021 at 11:00pm EST
Class 10 quiz		0%	Fri Nov 26, 2021 at 11:00pm EST
Class 11 quiz		0%	Thu Dec 2, 2021 at 11:00pm EST
Class 12 quiz		0%	Wed Dec 15, 2021 at 11:00pm EST
Exams 50%			
Midterm		25.41%	Wed Nov 3, 2021 at 12:00pm EDT
Student Honour Statement - Midterm Exam		0%	Wed Nov 3, 2021 at 09:30am EDT
Final exam		24.59%	Wed Dec 15, 2021 at 11:30am EST
Student Honour Statement - Final Exam		0%	Wed Dec 15, 2021 at 08:20am EST
Imported Assignments 0%			
Midterm - BA		0%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Assignment 1

 **Due Date:** Wed Oct 13, 2021 at 08:30am EDT

Unzip the attached archive and follow the instructions in MMAI5000_Assignment1.pdf.

The deadline for submission is on October 13 at 8:30 am.

Assignment1.zip  (https://schulich.instructure.com/courses/5863/files/590886/download?download_frd=1)

Assignment 2

 **Due Date:** Wed Nov 17, 2021 at 08:30am EST


See the attached PDF for instructions.

assignment2.pdf  (https://schulich.instructure.com/courses/5863/files/600052/download?download_frd=1)

Good luck,


Hjalmar

Assignment 3

 **Due Date:** Wed Dec 8, 2021 at 08:30am EST

Assignment 3: **MMAI5000_assignment3.ipynb**.  (https://schulich.instructure.com/courses/5863/files/639263/download?download_frd=1)

Class 1 quiz

 **Due Date:** Fri Sep 17, 2021 at 11:59pm EDT


Please answer the questions during the lecture, and submit your answers by the end.

Class 2 quiz

 **Due Date:** Thu Sep 23, 2021 at 11:00am EDT


Please answer the questions during the lecture, and submit your answers by the end.

Class 3 quiz

 **Due Date:** Wed Sep 29, 2021 at 12:59pm EDT


Please answer the questions during the lecture, and submit your answers by the end.

Class 4 quiz

 **Due Date:** Thu Oct 7, 2021 at 11:00pm EDT


Please answer the questions during the lecture, and submit your answers by the end.

Class 5 quiz

 **Due Date:** Thu Oct 14, 2021 at 11:59pm EDT


Please answer the questions during the lecture, and submit your answers by the end.

Class 6 quiz

 **Due Date:** Thu Oct 21, 2021 at 11:59pm EDT


Please answer the questions during the lecture, and submit your answers by the end.

Class 8 quiz

 **Due Date:** Tue Nov 16, 2021 at 11:00pm EST


Please answer the questions during the lecture, and submit your answers by the end.

Class 9 quiz

 **Due Date:** Thu Nov 18, 2021 at 11:00pm EST


Please answer the questions during the lecture, and submit your answers by the end.

Class 10 quiz

 **Due Date:** Fri Nov 26, 2021 at 11:00pm EST


Please answer the questions during the lecture, and submit your answers by the end.

Class 11 quiz

 **Due Date:** Thu Dec 2, 2021 at 11:00pm EST


Please answer the questions during the lecture, and submit your answers by the end.

Class 12 quiz

 **Due Date:** Wed Dec 15, 2021 at 11:00pm EST

Please answer the questions during the lecture, and submit your answers by the end.

Midterm

 **Due Date:** Wed Nov 3, 2021 at 12:00pm EDT

This is an open book (textbook, lecture slides, notes tutorials and a calculator are allowed) exam. However, **no form of collaboration or assistance from others is allowed**. To support academic integrity, Canvas automatically processes your submission with Turnitin. Any unusual similarities among student submissions will be identified for further investigation. The **honour statement** must be signed before starting the exam.

From starting the exam you will have **2 1/2 hours** or until 12:00 pm to submit, whichever comes first. For example, if you begin the exam at 9 am then you will have to submit it by 11:30 am.

Late submissions will not be accepted and therefore will receive a mark of zero -- no exceptions.


I'll be available via email every half hour between 8:30 am and 12 pm. If you have technical issues or questions, please include screenshots. Skipping a question without sending me a screenshot of the issue will result in zero marks for that question.

In the settings, you can see that the number of attempts is set to two. However, this is in case of technical issues and this does not mean that you have two attempts.

Good luck,

Hjalmar

Student Honour Statement - Midterm Exam

 **Due Date:** Wed Nov 3, 2021 at 09:30am EDT

Before beginning the midterm exam, you have to sign the student honour statement.

Sign the statement by answering the question with your full legal name and submit.

Final exam

 **Due Date:** Wed Dec 15, 2021 at 11:30am EST

This is an open book (textbook, lecture slides, notes, tutorials and a calculator are allowed) exam. However, **no form of collaboration or assistance from others is allowed**. To support academic integrity, Canvas automatically processes your submission with Turnitin. Any unusual similarities among student submissions will be identified for further investigation.


From starting the exam you will have **2 1/2 hours** or until 11:30 am to submit, whichever comes first. For example, if you begin the exam at 8:30 am then you will have to submit it by 11:00 am.

Late submissions will not be accepted and therefore will receive a mark of zero -- no exceptions.

I'll be available via email every half hour between 8:30 am and 11:30 am. If you have technical issues or questions, please include screenshots. Skipping a question without sending me a screenshot of the issue will result in zero marks for it.

In the settings, you can see that the number of attempts is set to two. However, this is in case of technical issues and does not mean that you have two attempts.

Student Honour Statement - Final Exam

 **Due Date:** Wed Dec 15, 2021 at 08:20am EST

Before beginning the final exam, you have to sign the student honour statement.

Sign the statement by answering the question with your full legal name and submit.

Midterm - BA

This is an open book (textbook, lecture slides, notes tutorials and a calculator are allowed) exam. However, **no form of collaboration or assistance from others is allowed**. To support academic integrity, Canvas automatically processes your submission with Turnitin. Any unusual similarities among student submissions will be identified for further investigation. The **honour statement** (`$CANVAS_OBJECT_REFERENCE$/quizzes/g19f09172379fa1a8a208c91e20f0e627`) must be signed before starting the exam.

From starting the exam you will have **3 1/2 hours** or until 1:00 pm to submit, whichever comes first. For example, if you begin the exam at 9 am then you will have to submit it by 12:30 pm.

Late submissions will not be accepted and therefore will receive a mark of zero -- no exceptions.

I'll be available via email every half hour between 8:30 am and 1 pm. If you have technical issues or questions, please include screenshots. Skipping a question without sending me a screenshot of the issue will result in zero marks for that question.

In the settings, you can see that the number of attempts is set to two. However, this is in case of technical issues and this does not mean that you





have two attempts.

Good luck,








Hjalmar

CLASS-BY-CLASS SYLLABUS

Class 1 - Topic 1

 Class 1: Introduction to AI – a historical perspective
Lecture
 MMAI5000_F21_lecture01.pdf
 Lecture recording
Lecture notes
 AI4Bv0_1.3_chapter1.pdf
Quiz
 Class 1 quiz

Class 2 - Topic 2








 Class 2: Search for problem-solving
Lecture
 MMAI5000_F21_lecture01END.pdf
 MMAI5000_F21_lecture02.pdf
 Lecture recording
Lecture notes
 AI4Bv0_1.5_chapter3.pdf
Quiz
 Class 2 quiz
Assignment
 Assignment 1

Class 3 - Topic 3






 Class 3: Knowledge-based systems
Lecture
 MMAI5000_F21_lecture03.pdf

 MMAI5000_F21_class03.mp4
 Lecture recording, part 2
Lecture notes
 AI4Bv0_1.5_chapter2.pdf
Quiz
 Class 3 quiz

Class 4 - Topic 4

 Class 4: Evolutionary Computation
Lecture
 MMAI5000_F21_lecture04.pdf
 AI4Bv0_1.5_chapter4.pdf
 Lecture recording
Quiz
 Class 4 quiz
Tutorial
 MMAI5000_class04_GA.ipynb
 MMAI5000_class04_GA_SOLUTION.ipynb

Class 5 - Topic 5

 Class 5: Machine learning – supervised learning, part 1
Lecture
 MMAI5000_F21_lecture05.pdf
 Lecture recording
Quiz
 Class 5 quiz
Tutorial
 MMAI5000_class05_LinClass.ipynb
 Tutorial walkthrough
Assignment



Assignment 2

Class 6 - Topic 6



Class 6: Machine learning – supervised learning, part 2

Lecture



MMAI5000_F21_lecture06.pdf



Lecture recording

Tutorial



MMAI5000_class06_NonlinClass.ipynb

Quiz



Class 6 quiz

Class 7 - Topic 7



Class 7: Midterm Exam










Student Honour Statement - Midterm Exam










Midterm




Class 8 - Topic 8



 Class 8: Machine learning – unsupervised learning
Lecture
 MMAI5000_F21_lecture08.pdf
 MMAI5000_F21_lecture08_studentversion.pdf
 Lecture recording
Quiz
 Class 8 quiz
Tutorial
 MMAI5000_class08_Clustering.ipynb
 MMAI5000_class08_Clustering_SOLUTION.ipynb

Class 9 - Topic 9

 Class 9: Introduction to neural networks & deep Learning
Lecture
 MMAI5000_F21_lecture09.pdf
 AI4Bv0_1.7_chapter5.pdf
 Lecture recording
Quiz
 Class 9 quiz
Tutorial
 MMAI5000_class09_NN.ipynb
Assignment
 Assignment 3

Class 10 - Topic 10








 Class 10: Convolutional Neural Networks
Lecture
 MMAI5000_F21_lecture10.pdf
 Lecture recording

Quiz
 Class 10 quiz
Tutorial
 MMAI5000_class10_transfer.ipynb
 data.zip

Class 11 - Topic 11

 Class 11: Reinforcement Learning
Lecture
 MMAI5000_F21_lecture11.pdf
 Lecture recording
Quiz
 Class 11 quiz
Tutorial
 MMAI5000_class11_RL.ipynb
 pong_models.zip
 Tutorial recording

Class 12 - Topic 12

 Class 12: Simulations and multi-agent systems
Lecture
 MMAI5000_F21_lecture12.pdf
 Lecture recording
Quiz
 Class 12 quiz
Tutorial
 MMAI5000_class12_BankSimulation.ipynb
 MMAI5000_class12_MonteCarlo.ipynb
 MMAI5000_class12_tutorial.mp4

Deliverables

These course materials are designed for use as part of this course at York University and are the property of the instructor unless otherwise stated. Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law.

Copying this material for distribution (e.g. uploading material to a commercial third-party website) may lead to a violation of Copyright law.

Minor Course Change MBAN Program 6

The following information is required for all course change proposals at the undergraduate and graduate level. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

1. Program

Schulich MBAN Program

2. Course Number and Credit Value

MGMT 6300

3. Course Title

a) Long Course Title

Case Analysis and Presentation Skills

b) Short Course Title

Case Analysis and Presentation Skills

4. Existing Pre-requisites/Co-Requisites

N/A

5. Type of Course Change (indicate all that apply)

<input type="checkbox"/>	in course number
<input type="checkbox"/>	in credit value (provide course outline)
<input type="checkbox"/>	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
<input type="checkbox"/>	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
<input type="checkbox"/>	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
<input type="checkbox"/>	in integration (provide statement of approval from other program)
<input type="checkbox"/>	in cross-listing (provide statement of approval from other program)
<input type="checkbox"/>	in pre/co-requisite
<input type="checkbox"/>	expire course
<input checked="" type="checkbox"/>	other (please specify) Add as required course for MBAN Program

6. Effective Session of Proposed Change(s)

Summer 2023

7. Academic Rationale

Focuses students on communication skills and business contextualization in support of the more effective implementation of both the managerial and analytic learning objectives of the program

8. Proposed Course Information

Not relevant.

Existing Course Information (Change from)	Proposed Course Information (Change to)

9. Consultation

Following changes were made in consultation with OMIS area on March 18 2022.

Originator



Signature

April 19 2022

Date

David Johnston

Name

OMIS Area

Area or Specialization

Approvals:

Area or Specialization

I have reviewed this change form and I support the proposed changes to the course.



Signature

April 26, 2022

Date

Eileen Fischer

Name

MKTG

Area or Specialization

Degree Program

I have reviewed this change form and I support the proposed changes to the course.

Ashwin Joshi

Signature

April 26, 2022

Date

Ashwin Joshi

Name of Program Director

MBA

Program

Program Committee

This course change has received the approval of the relevant Program Committee.

Marcia Annisette

Signature

April 28, 2022

Date

Marcia Annisette

Name of Committee Chair

MPC

Committee



MGMT6300 W2021 CREDITS: 3.00

MGMT 6300 X - CASE ANALYSIS AND PRESENTATION SKILLS

MON 19:00-22:00

INSTRUCTOR

Carolyn Burns

cburns18@schulich.yorku.ca

416.736.2100 Ext. 55088

G329 MB



ADMIN

Tram Pham

trampham@schulich.yorku.ca

416.736.2100 Ext. 55077

N304A SSB



Carolyn is the Executive Director of the Devonshire Initiative, a multi-stakeholder forum that brings together companies and non-profit organizations to improve outcomes for mining impacted communities. She is also the Co-Founder and Director of Operations at NetPositive, where she supports collaborative research and problem solving that is focused on the social outcomes of extractive development. Over the past ten years, Carolyn has helped large corporations, academic institutions, small companies and non-profits implement systems to understand and manage their interactions with people. Carolyn lives in Toronto but is from Edmonton, Alberta and has lived and worked in many countries. She has a Masters in Business Administration from the Schulich School of Business, a Graduate Certificate in Community Relations in the Extractive Sector from Queen's University and a Honours Bachelor of Arts from McGill University.

BRIEF DESCRIPTION

This course is designed to give students the opportunity to practice and develop their analytical thinking and presentation skills. The key objective of the course is to train students to successfully participate in national and international case competitions. A secondary objective is to prepare students to successfully interview for management consulting positions. Second-year MBA students who enjoy analyzing cases and delivering presentations are encouraged to take the course. Prerequisites: SB/ACTG 5100 3.00, SB/MGMT 5150 3.00, SB/MGMT 5260 3.00, SB/MKTG 5200 3.00 & SB/ORGS 5100 3.00. Corequisite: SB/SGMT 6000 3.00

COURSE LEARNING OUTCOMES

STRATEGIC THINKING:

To be successful in their careers, business professionals apply strategic thinking to overcome critical challenges and seize opportunities to create value for their organizations. Strategic thinking informs how business professionals address core questions that every organization faces, such as: "What is the greatest opportunity OR challenge the business must overcome? How does a business create value? What should the organization do to create more value?" The development of a systematic way of thinking that enables students to recommend solutions to complex challenges and opportunities that businesses face is a key objective of this course.

PRESENTATION:

The ability to succinctly answer questions and to think fast on your feet are foundational skills for all MBA graduates. These skills become increasingly valuable for those aspiring to take on leadership positions. During this course, you will contribute to graded team presentations. At the end of each presentation a critique of both content and style will be delivered. This iterative process is designed to enhance students' presentation skills, including the ability to concisely communicate conclusions and effectively sell ideas.

STRUCTURED THINKING & LISTENING SKILLS:

Structured thinking and frameworks allow business professionals to bring clarity and rigorous logic to the solving of complex business problems. Frameworks break problems into comprising drivers, help prioritize key issues for analysis, and identify potential solutions. In this course, students will learn to apply structured thinking to problems either through the use of existing frameworks or the development of their own. Additionally, students are encouraged to *listen* and to ask compelling and relevant questions during class discussions and the Q&A session that will follow each team presentation.

TEAMWORK & FACILITATION SKILLS:

Each class, students will work in randomly selected teams of 4-6 (depending on class size). The assignment of random teams is designed to give students exposure to various individuals and team dynamics with the goal to build their communication, leadership and facilitation skills.

LEARNING REMOTELY

Due to the COVID-19 situation, this course will run in an online format. All students are expected to have the following technology to participate in this course:

1. Computer
2. High speed internet
3. Web camera
4. Microphone

Students are responsible for ensuring they have the equipment needed and corresponding practices in place (e.g., ability to tether to hotspot in the event of an internet outage, data backup strategy in the event of computer failure) to ensure they can complete course requirements.

Several platforms will be used in this course (e.g., Canvas, Zoom, etc.) through which students will interact with the course materials, the instructor, as well as with one another. Please review the technical specifications for **Zoom** (<https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux>) and **Canvas** (<https://community.canvaslms.com/t5/Canvas-Basics-Guide/What-are-the-browser-and-computer-requirements-for-Canvas/ta-p/66>) . Please review the syllabus to determine how the class meets (in whole or in part) and how presentations will be conducted. Students shall note the following:

- Zoom is hosted on servers in the U.S. This includes recordings done through Zoom.
- If you have privacy concerns about your data, provide only your first name or a nickname when you join a session.
- The system is configured in a way that all participants are automatically notified when a session is being recorded. In other words, a session cannot be recorded without you knowing about it.

Copying of any Zoom recordings or other course materials for public or commercial distribution is strictly prohibited and may lead to copyright and/or privacy law violations.

Technical Issues





Students who are unable to submit an assignment or exam due to technical issues with their computer, network connection or learning tools should immediately email a copy of their work to their instructor, and then complete and email a **Technical Issues Form** to their instructor. For Exams, please also review complete all requirements from the policy page of the syllabus.

COURSE MATERIAL

Course materials have been assembled into a course kit. Every week, a case is assigned. Check the session-by-session syllabus below to determine which case will be reviewed / worked on in class.


If you prefer, you can also purchase the assigned cases directly from HBR - <https://hbr.org/store/case-studies> (<https://hbr.org/store/case-studies>)

ASSIGNMENT SUMMARY

Assignment Task	Group Individual	Total % of Final Grade	Due Date
In-Class Group Case Presentations 50%			
Group Case Presentation #1 (12.5%)		12.5%	Mon Feb 22, 2021 at 07:00pm EST
Group Case Presentation #2 (12.5%)		12.5%	Mon Mar 8, 2021 at 07:00pm EST
Group Case Presentation #3 (12.5%)		12.5%	Mon Mar 22, 2021 at 07:00pm EDT
Group Case Presentation #4 (12.5%)		12.5%	Mon Apr 5, 2021 at 07:00pm EDT

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Group Case Presentation #1 (12.5%)

 **Due Date:** Mon Feb 22, 2021 at 07:00pm EST

In-Class Group Case Presentations

The course includes **4** sessions with a case presentation. Students are expected to review and analyze the assigned case before class and to come prepared. Adequate preparation includes pre-reading the case, a high-level situation assessment, core issue, problem statement, thoughts about potential solutions, and other ideas (e.g., alternatives to address the issue, brief notes that highlight your perspective, etc.). Pre-reading the case is **required** to ensure all students can meaningfully contribute to their group discussions and presentations.

Students will be randomly divided into teams. All teams will be assigned the same case. Each presentation will be graded by the course instructors on presentation skills and case analysis. Complete all group presentations with a minimum of 14-point font and include no more than one slide per minute (i.e., if the presentation is 10 minutes long, you should not have more than 10 slides). Note, the appendix may include as many slides as the group deems necessary.

Submission:

A soft copy of the presentation must be emailed **on time**, the day of your presentation for grading and reference.


Save / Title Case: Group X – Class X

The Email Subject Line: Group X – Class X


The entire Team (in attendance) **MUST** be copied on the submission.

Presentations that are submitted incorrectly will be deducted a single grade point. A single grade point will also be deducted for late submission and an additional grade point will be deducted every 3 minutes the presentation is submitted late thereafter. Groups that are not ready to present on time will be deducted similarly. Appendices are acceptable for Q&A purposes.


Group Case Presentation #2 (12.5%)

 **Due Date:** Mon Mar 8, 2021 at 07:00pm EST

Group Case Presentation #3 (12.5%)

 **Due Date:** Mon Mar 22, 2021 at 07:00pm EDT

Group Case Presentation #4 (12.5%)

 **Due Date:** Mon Apr 5, 2021 at 07:00pm EDT

WRITTEN ASSIGNMENTS: EVALUATION

Classes will involve a short lecture or discussion followed by the assignment of groups in which students will be asked to solve a business case contained in the course kit. In class students will be asked to present their group's recommendations and supporting rationale.

To prepare for m class students will be asked to read a business case, conduct an analysis, draft a problem statement and reflect on what their recommendations would be to tackle the key strategic issue in the case. It is important that students come to each class having read the assigned case so that they can meaningfully contribute to the class discussions and to their group's presentation.

All deliverables will be evaluated on students' understanding of the case, use of principles presented in class and overall presentation style (on paper and physically).

CLASS-BY-CLASS SYLLABUS

Class 1 - Introduction: Case Method

Jan 11/21

Overview: Class 1

Overview of Case Method
Frameworks and Analysis
Identifying Core Issues & Developing Problem Statements

Class 2 - Focus on Frameworks

Jan 18/21

Overview: Class 2

Review of Core Issues and Problem Statements
Discuss Frameworks and Situational Analysis
Breakout Session: Team Analysis & Group Discussion
Group Case Practice #1: Hamilton Won More Than Twitter

Class 3 - Focus on Alternatives

Jan 25/21

Overview: Class 3

Breakout Session: Alternatives and Solutions
Group Case Practice #2: Stack Brewing: A Little Brewery in the Big Nickel. Ron Mulholland; Cameron Brooks, Benoit Roy; Katarina Schwabe, Cassidy Stewart.

Class 4 - Focus on Implementation Plans

Feb 1/21

Overview: Class 4

Overview of Implementation Plans and Risks
Individual In-class Quiz #1: 3M Canada: The Health Care Supply Chain. Johnson.

Class 5 - Focus on Presentation Skills – Bringing Everything Together

Feb 8/21

Overview: Class 5

Prep for Presentations & Intro to Facilitation Skills
Using Your Time Wisely
Individual In-class Quiz #2: The Coca-Cola Company's Case for Creative Transformation. Thales S. Teixeira; Elizabeth Anne Watkins.

Class 6 - Focus on Polishing – Building a Strong Deck

Feb 22/21

Overview: Class 6

Insights, Takeaways & Headlines

Slide Development

Group Case #1: ClickDishes: Serving New Cities. William Wei, Lei Jin, Etayankara Muralidharan

Class 7 -
Focus on
Diversity and
Inclusion

Mar 1/21

Overview: Class 7

Overview of Diversity and Inclusion

Individual In-class Quiz #3: Managing Diversity and Inclusion at Yelp. **Michael Luca**, ([https://hbsp.harvard.edu](https://hbsp.harvard.edu/search?author=Michael%20Luca)/search?author=Michael%20Luca) **Joshua R. Schwartzstein**, ([https://hbsp.harvard.edu](https://hbsp.harvard.edu/search?author=Joshua%20R.%20Schwartzstein)/search?author=Joshua%20R.%20Schwartzstein) **Gauri Subramani** (<https://hbsp.harvard.edu/search?author=Gauri%20Subramani>) .

Class 8 - Focus on Sustainability and Marketing

Mar 8/21

Overview: Class 8

Group Case #2: Colgate-Palmolive Company: Marketing Anti-Cavity Toothpaste. John A. Quelch; Margaret Rodriguez

Class 9 - Focus on Supply Chain and Ethical Sourcing

Mar 15/21

Overview: Class 9

Overview of ESG, Sustainability and Supply Chains

Individual In-class Quiz #4: Looking Inside: Intel and Conflict Minerals. Shotts, Melvin.

Class 10 - Focus on and Digital Strategy

Mar 22/21

Overview: Class 10

Group Case #3: Disney and 21st Century Fox: Reshaping Disney's Strategy for the Digital Age. **Guillaume Roels**,(<https://hbsp.harvard.edu/search?author=Guillaume%20Roels>) **Anne-Marie Carrick** ([https://hbsp.harvard.edu](https://hbsp.harvard.edu/search?author=Anne-Marie%20Carrick)

/search?author=Anne-Marie%20Carrick)

Class 11 - Focus on Online Tools and Innovation

Mar 29/21

Overview: Class 11

Lecture on Online and Virtual Tools

Individual In-class Quiz #5: "Kickboxing" at Adobe Systems. Integrating innovation programs in a corporation. Dann.

Class 12 - Focus on Growth Strategy

Apr 5/21

Overview: Class 12

Group Case #4: Big Hit Entertainment and Blockbuster Band BTS: K-Pop Goes Global. Elberse, Woodham

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

Preparation. Cases for each class will be read and analyzed before the start of each class. Come to class prepared with a perspective on the assigned case including, a high-level situation assessment, core issue, draft problem statement, thoughts about potential solutions, and other ideas (e.g., alternatives to address the issue, brief notes that highlight your perspective, etc.). You will reference these notes during the group breakout sessions.

Class Participation (contribution)

Participation. Students are expected to actively participate in all class and team exercises.

Deliverables

These course materials are designed for use as part of this course at York University and are the property of the instructor unless otherwise stated. Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law.

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Course Change Proposal Form

Schulich School of Business

The following information is required for all course change proposals. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading). Provide evidence of consultation, where appropriate.

1. Responsible Program:
Schulich MBA
2. Responsible Unit:
OMIS
3. Subject Code (Rubric) and Course Number:
MGMT6700
4. Credit Value:
3.00
5. Long Course Title:
Project Management
6. Short Course Title:
Project Management
7. Type of Course Change(s) (indicate all that apply):

X	in course number
	in credit value (provide course outline)
	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
X	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
	in integration (please provide statement of approval from relevant undergraduate coordinator or Chair)
	in cross-listing (please provide statement of approval from other program)
	in pre/co-requisite
	retire course
X	other (please specify) Course Rubric (proposed OMIS)

8. Effective Term/Calendar Year of Proposed Change(s):
Fall 2023

9. Rationale:

To improve the oversight of the course to the area that offers the course. The number changes because OMIS 6700 is already taken.

10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
<p>Course Number: MGMT-6700 3.00</p> <p>Long Course Title: Project Management</p> <p>Short Course Title: Project Management</p> <p>Calendar Description: This course covers the strategic, organizational and operational aspects of managing projects. Students learn to manage the technical, behavioral, political and cultural aspects of temporary groups performing unique tasks. Topics covered include: defining deliverables, formulating project strategy, effective group organization, and management, dynamically allocating resources, managing without authority and resolving conflict. Traditional cost and time management techniques are covered using contemporary software packages.</p> <p>Pre-requisites: None</p>	<p>New Course Number: OMIS 6750 3.00</p> <p>New Long Course Title: Project Management</p> <p>Short Course Title: Project Management</p> <p>Calendar Description: This course covers the strategic, organizational and operational aspects of managing projects. Students learn to manage the technical, behavioral, political and cultural aspects of temporary groups performing unique tasks. Topics covered include: defining deliverables, formulating project strategy, effective group organization, and management, dynamically allocating resources, managing without authority and resolving conflict. Traditional cost and time management techniques are covered using Microsoft Office and open-source, free project management software.</p> <p>Pre-requisites: None</p>

11. Enrolment Notes:
N/A

12. Consultation:

Originator:



Signature

March 15, 2022

David Elsner

Name

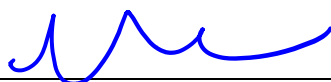
OMIS

Area or Specialization

Approvals:

Area or Specialization

I have reviewed this change form and I support the proposed changes to the course.



Signature

March 18, 2022

Date

M. Rungtusanatham

Name

OMIS

Area or Specialization

Degree Program:

I have reviewed this change form and I support the proposed changes to the course.

Ashwin Joshi

Signature

March 18, 2022

Date

Ashwin Joshi

Name of Program Director

MBA

Program

Program Committee:

This course change has received the approval of the relevant Program Committee.

Marcia Annisette

Signature

April 28, 2022

Date

Name of Committee Chair

Committee

Course Outline Fall 2022

Adjunct Professor
David Elsner
G216
Tel: 647-998-1587
Email: delsner@schulich.yorku.ca
Office hours: by appointment arranged by email

Assistant
Paula Gowdie Rose
S337N SSB
(416) 736.5074
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David Elsner is an Adjunct Professor at the Schulich School of Business in the OMIS specialization. He is also President of DHE Consulting and a Managing Partner at illuminaite, two firms specializing in consulting, advanced analytics, and AI to identify, analyze, and solve business problems. With over 20 years of experience as a consultant and executive, he has advised leading organizations across the globe.

An experienced consultant and lecturer, David provides analytical and professional classes to a wide range of academic programs and corporate clients. At Schulich, he teaches Data Visualization and Modelling, Project Management, and is the academic advisor for the MMAI and MBAN consulting projects.

David holds a BSc in Engineering, a BA in Economics, and an MBA in Strategy and Innovation from the University of Toronto.

He is also the Executive Director of the Yorkville Exotic Car Show and a Board Member for Melanoma Canada.

Brief Description

This course covers the strategic, organizational and operational aspects of managing projects. Students learn to manage the technical, behavioral, political and cultural aspects of temporary groups performing unique tasks. Topics covered include: defining deliverables, formulating project strategy, effective group organization, and management, dynamically allocating resources, managing without authority and resolving conflict. Traditional cost and time management techniques are covered using Microsoft Office and open-source, free project management software.

Prerequisite: None.

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Course Learning Outcomes

Students will learn the basic concepts of project management and using Microsoft Office and open-source, free project management software, will be exposed to several methods for project management. In addition, students will learn the organizational and interpersonal aspects of project management. At the end of the course students will have been provided with sufficient knowledge to operate effectively both as a project leader and as a member of a project team.

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

- Understand the need for a formal project management methodology
- Define project scope
- Estimate project budget and schedule
- Select and govern a project
- Manage a project team
- Develop a project plan using project management software
- Understand different organizational structures and how they impact project management

Organization of the Course

Today, project management techniques are used in virtually every industry ranging from the planning of a charitable fundraiser to the development of an e-commerce application. Articles in both Fortune and the Wall Street Journal have argued that project management is finding an increasing place in business. The editor of the International Journal of Project Management argues that “into the 21st century, project-based management will sweep aside traditional functional line management”. Project management techniques is as fundamental to the business toolkit as are knowledge of finance and accounting. This is particularly true in Information Technology where most applications development and implementations are treated as projects.

Pedagogy

This course is primarily a lecture-based course. Each student is expected to have read the assigned material for the lecture before class. They should be ready to discuss any of the material assigned for the prior week and the current week.

Unless prior arrangements have been made with the instructor, no late assignments will be accepted.

The lecture slides as well as this course outline and all other material needed for the class – except the book – can be accessed through the course’s Canvas site. The lecture slides will typically be posted before the lecture.

All deliverables will be individually assessed, except for the group projects (4 to 6 students per group). Students are expected to self-organize into groups of 4 to 6 students per group. Part of the group assignment will be a post project evaluation, which will be used as a factor for group and individual evaluation.

Deliverables at a Glance

In the table below, the impact of each task on your final grade for the course is indicated in the “% weight” column.

Assignment/Task	Quantity	% Weight	Total %	Author
Weekly Quizzes	8	3.125%	25%	Individual
Case Study Analysis	2	15%	30%	Individual
Group Discussions	8	1.875%	15%	Group
Group Project	1	30%	30%	Group
		TOTAL	100%	

Course Material

Required reading for this course includes the following book, which is available for purchase from the York University Bookstore (<http://bookstore.yorku.ca>):

Project Management: The Managerial Process, 8th edition, by Gray and Larson, McGraw-Hill, ISBN # 978-1-260-57043-4.

Course website

We will be using Canvas for all components of the course. This includes lecture slides, quizzes, assignments, and announcements, and any other course information and materials.

Copyright

Course materials, such as lectures, PowerPoint slides, tests, course notes, outlines, and similar materials, are protected by copyright. As creator of those materials the instructor(s) is the exclusive copyright owner. You may take notes and make copies of course materials for your personal use. However, you may not reproduce or distribute the course materials (e.g., uploading that content to a commercial website) without my express written permission.

Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law. Copying this content for distribution may lead to a violation of Copyright law.

Instructional Methods

Each week, there will be a combination of live in-class lectures, eLearning modules with videos, readings, and videos. The in-class live lecture will be approximately 2.5-3.0 hours in length and begin at the start time for each class. The eLearning modules discuss weekly textbook questions and cases. The live lectures are mandatory. The eLearning modules are recommended as they form the basis of the weekly quizzes.

Also included each week are links to readings and videos from other sources. You should attend the in-class lectures and complete the eLearning first, because the readings and videos will reinforce the lessons in the lectures and depending on your comfort with the topic, you may be able to skim some of the sections of the readings and videos. This is especially true for the videos, as they are very useful but, in some cases, lengthy.

To encourage productive class discussions, it is essential that all students keep up with the lectures, eLearnings, readings and videos assigned in this class each week.

All students will be expected to participate each week in the online group discussions.

Student Preparation for Class and Class Participation: Expectations

Preparation. This course will consist of a combination of theory and practical application. Students are expected to keep up with the assigned readings and class discussions week to week. This is necessary for good class discussion and required to complete the various deliverables for the course.

Class Participation (contribution). Good participation is defined and measured as, "the consistent demonstration of good preparation and presentation of relevant thought about the readings, cases, and exercises". The emphasis is on quality not quantity. The sharing of experiences relevant to the topics being discussed is also appreciated where class time allows.

In the weeks where there is an online group discussion, we will begin the class by discussing and sharing what each group had discussed and review key details and solutions. Students are expected to participate and will be called upon to provide their perspective.

Attendance

Attendance is not participation. Your attendance is expected for the full duration of the class. That means being on time when the class starts and being there when it ends. If you feel that you have to miss a class or any part of a class, inform the instructor before the class.

The instructor will frequently randomly select people in class to contribute. At that time, they will be expected to be present and prepared. For some subjects, people will want to participate a lot. In these situations, you should be respectful of other's desires to participate and therefore be brief and have a relevant point that adds to the discussion.

Finally, since you are in a learning environment of an educational institution, you will NOT be penalized for giving a wrong answer or asking the wrong question. You are encouraged to ask questions when you do not understand an item, or to provide answers to questions asked even if you are not sure your answers are correct. The instructor will provide guidance where necessary for questions and answers.

Student Responsibilities

1. Be prepared for class. You should expect to be called upon in class to present your analysis and positions at any time.
2. Be on time for class. We need to use the full amount of time available without distracting interruptions from late arrivals and early departures.
3. Keep the instructor informed. Let the instructor know if you are having problems. Let the instructor know if you cannot attend class. You do not want to miss anything.
4. Identify yourself. Come to class with a readable name card. Identify all your work completely with student number and name. These actions will help the instructor to get to know you as an individual.
5. Check Canvas the day before class to make sure you are aware of any class announcements and to download any PowerPoint slides and other documents posted by the instructor.
6. Get the information directly from the instructor. If you have a question, contact the instructor directly. Avoid secondhand information from other and former students. First consult this course outline.
7. Electronic devices are allowed for the purpose of following course materials, taking notes and completing in class assignments. The instructor has the right to disallow electronic devices not being used for genuine class purposes.

Class-by-Class Syllabus

Topics, readings, and other preparations for every class are listed below.

Note: If any changes in this schedule become necessary during the duration of the course, an announcement will be posted on the course Canvas to notify students.

Lecture 1 – Introduction and Modern Project Management

Discussion:

- Introductions
- Course Overview
- Assignments
- What is a Project
- Modern Project Management
 - Agile Project Management
 - Current Drivers of Project Management
 - Project Management Today: A Socio-Technical Approach

Textbook:

- Chapter 1

Readings and Videos:

- What is Project Management | PMI
- Certified Associate in Project Management | CAPM (pmi.org)
- PMP Certification | Project Management Institute (pmi.org)
- The Future of Project Management [3m]

Assignments:

- Weekly Quiz 1

Lecture 2 – Organization Strategy, Project Selection, Structure and Culture

Discussion:

- Organization Strategy and Project Selection
 - Why Project Managers Need to Understand Strategy
 - The Strategic Management Process: An Overview
 - The Need for a Project Priority System
 - Project Classification
 - Phase Gate Model
 - Selection Criteria
 - Applying a Selection Model
 - Managing the Portfolio System
- Organization: Structure and Culture
 - Project Management Structures
 - Project Management Office (PMO)
 - What Is the Right Project Management Structure?
 - Organizational Culture
 - Implications of Organizational Culture for Organizing Projects

Textbook:

- Chapter 2 and 3

Readings and Videos:

- Strategy Session: Three Ways to Get Aligned
- Winning on Strategy — The Power of Project Delivery
- You really want to build that? The politics of project selection
- Project Selection Criteria – Videocast [8m]
- Creating a best practice project management culture
- A Roadmap to PMO Excellence
- Creating Sustainable Organizational Culture Change in 80 Days | Arthur Carmazzi | TEDxMaitighar [23m]
- Max's Minute: Project Management Culture [6m]

Assignments:

- Group Discussion 1
- Weekly Quiz 2

Lecture 3 – Defining the Project

Discussion:

- Defining the Project
 - Step 1: Defining the Project Scope
 - Step 2: Establishing Project Priorities
 - Step 3: Creating the Work Breakdown Structure
 - Step 4: Integrating the WBS with the Organization
 - Step 5: Coding the WBS for the Information System
 - Process Breakdown Structure

- Responsibility Matrices
- Project Communication Plan

Textbook:

- Chapter 4

Readings and Videos:

- Developing a complete project scope statement in 2 days
- The ABC basics of the WBS Paul Burek
- What is Project Scope? [4m]
- Create a Project Communication Plan | Google Project Management Certificate [37m]

Assignments:

- Group Discussion 2
- Case Study 1 assigned

Lecture 4 – Estimating Project Times and Costs

Discussion:

- Estimating Project Times and Costs
 - Factors Influencing the Quality of Estimates
 - Estimating Guidelines for Times, Costs, and Resources
 - Top-Down versus Bottom-Up Estimating
 - Methods for Estimating Project Times and Costs
 - Level of Detail
 - Types of Costs
 - Refining Estimates
 - Creating a Database for Estimating
 - Mega Projects: A Special Case

Textbook:

- Chapter 5

Readings and Videos:

- Leveraging the new practice standard for project estimating
- 7 Tips for estimating your projects
- The Ultimate Guide to Estimating Projects
- How to Estimate Your Project [4m]

Assignments:

- Group Discussion 3
- Weekly Quiz 3

Lecture 5 – Developing a Project Schedule

Discussion:

- Developing a Project Schedule
 - Developing the Project Network
 - From Work Package to Network
 - Constructing a Project Network

- Activity-on-Node (AON) Fundamentals
- Network Computation Process
- Using the Forward and Backward Pass Information
- Level of Detail for Activities
- Practical Considerations
- Extended Network Techniques to Come Closer to Reality

Textbook:

- Chapter 6

Readings and Videos:

- Learning Curve
- Driving politics out of project schedules
- Scheduling 101--the basic of best practices
- Project Scheduling [13m]

Assignments:

- Group Discussion 4
- Weekly Quiz 4
- Case Study 1 due

Lecture 6 – Managing Risk

Discussion:

- Managing Risk
 - Risk Management Process
 - Step 1: Risk Identification
 - Step 2: Risk Assessment
 - Step 3: Risk Response Development
 - Contingency Planning
 - Opportunity Management
 - Contingency Funding and Time Buffers
 - Step 4: Risk Response Control
 - Change Control Management

Textbook:

- Chapter 7

Readings and Videos:

- Risk management - the undiscovered dimension of project management
- Project success using no-nonsense risk management techniques
- Managing Risk
- Address Risk
- Perspectives on Managing Project Risk [38m]

Assignments:

- Group Discussion 5
- Weekly Quiz 5

Lecture 7 – Scheduling Resources and Costs and Resulting Project Duration

Discussion:

- Scheduling Resources and Costs
 - Overview of the Resources Scheduling Problem
 - Types of Resources Constraints
 - Classification of a Scheduling Problem
 - Resource Allocation Methods
 - Resource-Constrained Scheduling
 - Splitting Activities
 - Benefits of Scheduling Resources
 - Assigning Project Work
 - Multiproject Resource Schedules
 - Develop a Project Cost Baseline
- Reducing Project Duration
 - Rationale for Reducing Project Duration
 - Options for Accelerating Project Completion
 - Project Cost-Duration Graph
 - Practical Considerations
 - What IF Cost, Not Time, Is the Issue?

Textbook:

- Chapter 8 and 9

Readings and Videos:

- Fundamentals of scheduling & resource leveling
- Importance of Project Schedule and Cost Control in PM
- What the heck happened to my resources -- the multiple project dilemma
- Scheduling Resources on Multiple Projects [3m]
- Ways to improve performance on projects
- Project Crashing in Project Management
- The risks of outsourcing
- Pressure to Reduce Your Project Budget [6m]

Assignments:

- Group Discussion 6
- Weekly Quiz 6
- Case Study 2 assigned

Lecture 8 – Being an Effective Project Manager and Managing Project Teams

Discussion:

- Being an Effective Project Manager
 - Managing versus Leading a Project
 - Engaging Project Stakeholders
 - Influence as Exchange
 - Social Network Building
 - Ethics and Project Management
 - Building Trust: The Key to Exercising Influence
 - Qualities of an Effective Project Manager
- Managing Project Teams

- The Five-Stage Team Development Model
- Situational Factors Affecting Team Development
- Building High-Performance Project Teams
- Managing Virtual Project Teams
- Project Team Pitfalls

Textbook:

- Chapter 10 and 11

Readings and Videos:

- 10 traits of highly effective project managers
- The Power of Leadership Emotions
- Transformation—How to Manage Complexity
- A sixth sense for project management [16m]
- Leadership essentials for project management professionals (PMPs)
- Remote Reality Check: What's Next for Virtual Teams
- Stop Managing, Start Leading [18m]
- Building High Performance Teams [16m]

Assignments:

- Group Project assigned

Lecture 9 – Progress and Performance Measurement and Evaluation

Discussion:

- Progress and Performance Measurement and Evaluation
 - Structure of a Project Monitoring Information System
 - The Project Control Process
 - Monitoring Time Performance
 - Earned Value Management (EVM)
 - Developing a Status Report: A Hypothetical Example
 - Indexes to Monitor Progress
 - Forecasting Final Project Cost
 - Other Control Issues

Textbook:

- Chapter 13

Readings and Videos:

- Anatomy of an effective status report
- Measure Outcomes
- EVM for the rest of us
- How to Deliver Effective Project Cost Management [19m]

Assignments:

- Group Discussion 7
- Weekly Quiz 7
- Case Study 2 due

Lecture 10 – Project Closure

Discussion:

- Project Closure
 - Types of Project Closure
 - Wrap-up Closure Activities
 - Project Audits
 - Project Audits: The Big Picture
 - Post-implementation Evaluation

Textbook:

- Chapter 14

Readings and Videos:

- The Most Complete Project Closure Process You'll Ever Need
- Help! Your project has been selected for an audit--what now?
- Post-Implementation Reviews
- Project know-how

Assignments:

- Group Discussion 8
- Weekly Quiz 8

Lecture 11 – Agile Project Management

Discussion:

- Agile Project Management
 - Traditional versus Agile Methods
 - Agile PM
 - Agile PM in Action: Scrum
 - Extreme Programming and Kanban
 - Applying Agile PM to Large Projects
 - Limitations and Concerns
 - Hybrid Models

Textbook:

- Chapter 15

Readings and Videos:

- Introduction to Disciplined Agile® (DA™)
- Taking off the agile training wheels, advance agile project management using Kanban
- Team Agility / Scrum Support System
- Agile Project Management with Kanban | Eric Brechner | Talks at Google [64m]
- Introduction to Scrum [7m]

Lecture 12 – Presentations

Discussion:

- Presentations of Group Project

Assignments:

- Group Project Due

Written Assignments/Projects

Further details regarding course deliverables will be posted on the course Canvas site as the course unfolds. There may be minor adjustments to the schedule if required.

Unless prior arrangements have been made with the instructor, no late assignments will be accepted.

Weekly Quizzes | Value $8 \times 3.125\% = 25\%$ (Individual)

In most weeks, you will be required to complete a short online quiz in Canvas that will be based on that week's assigned modules and readings.

Each quiz will contain 12 matching, multiple choice, ordering, and true/false questions and will have a time limit of 15 minutes. The quiz is open book. Be prepared to answer the quiz questions by having your lecture slides and textbook open and easily accessible.

The quiz will be available from 9:00am – 5:00pm Eastern time on the day of class, one week after the module. You may start the quiz at any time during the eight-hour opening, at which time your 15 minutes begin.

The questions are randomized from a question bank, so no two quizzes will be identical. NOTE: You will only see a submission confirmation upon completion. Your responses, correct answers, and question feedback will be available the day after the quiz.

Case Study Analysis | Value $2 \times 15\% = 30\%$ (Individual)

The purpose of the case study analysis is to demonstrate that you can think through a real-life project management problem by applying the course learnings in a logical, professional, ethical, and informed manner.

The cases will be taken from the assigned textbook. Students will be given several questions to answer about the case.

Deliverable will be a report using Microsoft Word (or equivalent tool). You may also need to use ProjectLibre (or equivalent tool) to answer some of the questions. Max length: 3,000 words, supported by diagrams/or and screenshots (not including the executive summary).

Each case study is worth 15% of the final grade. The marking rubric will be in the module PPT in the week the case study is assigned.

Group Discussions | Value $8 \times 1.875\% = 15\%$ (Group)

There will be eight Group Discussions in this course, each marked out of 1.875 points. In your groups, students will be asked to discuss questions from a chapter Snapshot from Practice. Your contributions to the Group Discussions will consist of an original posting and a response to other students' postings. Each Group Discussion is open for five and a half days.

All students are expected to participate in the online discussions. Each week's discussion will be open on Canvas immediately following the weekly module (lecture). Your initial posts and responses must be posted in Canvas no later than the time identified in Canvas.

The instructor will refrain from commenting on a students' discussion posts. The hope is this will encourage students to think critically about the visualizations and the discussion rather than waiting to see what the "right" answer is from the instructor.

Group Project | Value 30% (Group)

Students will work in their groups to select a project to assess, plan, and execute.

Your work will consist of developing a detailed project plan using the appropriate project management content and techniques from class.

Deliverable will be:

- Report containing the detailed project plan.
- 20-minute group presentation of the report.

There are two objectives of this project. The first objective is to use all the content learned over the course to develop a complete end-to-end project plan for a real scenario. The second objective is to design and deliver an effective presentation to share the analysis, insights and recommendations to executives.

Complete project details and the marking rubric will be provided in the module PPT in the week the project is assigned.

General Academic Policies: Grading, Academic Honesty, Accommodations and Exams

Grades at Schulich MBA are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, elective courses are expected to have a mean grade between 5.2 and 6.2.

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor. For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

Academic honesty

Academic honesty is fundamental to the integrity of university education and degree programs and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found on the Schulich website: <http://schulich.yorku.ca/current-students/academic-honesty/>.

Quizzes (Absence from)

Students who miss an Exam must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file. Students who miss an Exam due to illness must have their doctor complete an "Attending Physician's Statement." For more details, see: <http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf>.

Accommodations

For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services. Students are advised to make the instructor aware of any accommodations required, so the instructor can provide those accommodations on a timely basis. For counseling and disability services, contact Student Services or see <http://www.yorku.ca/cds/>.

Memo

To: Schulich Faculty Council

From: Kevin Tasa, ORGS Area Coordinator

Date: April 19, 2022

Re: Creation of New MBA Specialization in: Leading Equitable, Diverse, and Inclusive Organizations

Motion: That Faculty Council approve the creation of a new specialization for the MBA program in the field of Leading Equitable, Diverse, and Inclusive Organizations to be launched in Fall 2022.

Rationale:

Organizations that manifest a culture of acknowledging diversity, and commitment to principles of equity and practices of inclusion, thrive in today's world. As prior research has shown, this culture of commitment fuels employee engagement as well as employee creativity and innovation. Critically, today's business and society at large require organizations to be responsive to social justice calls and create equitable, diverse, and inclusive workplace and business practices. As such, organizations and their leaders are in a unique position to be a driver of this social change and consequently contribute to a better workplace. However, significant disagreement continues to exist regarding how to best generate such environments and how individuals can serve as true allies to traditionally under-represented groups. Beyond the business case, the moral argument for developing diverse, equitable, and inclusive workplaces has gained greater salience within organizations and in civil society more generally. The aim of the proposed specialization in Leading Equitable, Diverse, and Inclusive Organizations is to create graduates that have the mindset, the vocabulary, and the skills that are needed to build organizational cultures and develop workplace policies that manifest a steadfast commitment to principles of equity and practices of community building.

Learning Outcomes:

Having taken this specialization, students will be able to:

1. Explain how issues of personal identity, privilege, and bias shape employee's experiences and influence organizational effectiveness.
2. Understand how to shape equity, diversity, and inclusion policies and practices in ways that overcome resistance and build more effective organizations.

3. Use their knowledge of the intersection of diversity and business innovation to lead, change, think and speak appropriately across genders, cultures and other identities.
4. Understand the role of organizations in creating and promoting more equitable, diverse, and inclusive workplaces and thus benefit both organizations and broader society.

Demand for the Specialization:

Across numerous focus group sessions with students, findings from GBC surveys of the student body, and individual interactions with students, student demand for this specialization is both long-standing and substantial. We have also seen a marked increase in employer demand for graduates that have expertise in these issues (e.g.: <https://www2.deloitte.com/ca/en/pages/careers/articles/diversity-and-inclusion.html>). While we have individual courses that can contribute to the development of student knowledge of this area, there is currently no option for students within the MBA program to specialize or indicate their expertise to future employers in this growing field.

Competitive Landscape:

A number of Schulich's peer schools have already created similar specialization offerings.

SCHOOL	PROGRAM
Kellogg	https://www.kellogg.northwestern.edu/programs/full-time-mba/academics/majors-pathways/diversity-equity-inclusion-pathway.aspx
Goizueta (Emory)	https://goizueta.emory.edu/full-time-mba/concentration/diversity-equity-inclusion see also: https://finance.yahoo.com/news/emory-mba-program-launches-pioneering-153955692.html
Newman	https://newmanu.edu/academics/graduate-programs/mba-wichita/dei-concentration
Kenan-Flagler	https://www.kenan-flagler.unc.edu/programs/mba/full-time-mba/student-experience/culture-community/
Tufts	https://grad.tufts.edu/diversity-inclusion-leadership-international/?gclid=Cj0KCQjwl7qSBhD-ARIsACvV1X2YNwTgV2PwOo9LQefjAsrh5cEQ2q9zHgXCwIK55MzNMF1nBsF4QqgaAuuVEALw_wcB
Rotman	https://www.rotman.utoronto.ca/ProfessionalDevelopment/Executive-Programs/Programs-Individuals/InclusionByDesign
UBC	https://extendedlearning.ubc.ca/courses/engaging-diversity-inclusion-organizations/mc609

Specialization Structure and Courses:

Schulich's proposed specialization would require completion of four courses, totalling 12.00 credits, with two courses being required and two courses chosen from existing electives in ORGS. The two required courses are:

1. ORGS 6xxx 3.0 Diversity and Inclusion in Organizations
2. ORGS 6xxx 3.0 EDI for Strategic Innovation

These courses provide the necessary foundational knowledge required to understand the impact of diversity and inclusion in organizations and create strategies for creating an inclusive organizational culture. The first course (Diversity and Inclusion in Organizations) was created as a BBA course in 2019 and has been at capacity each year. The second course is all-new and is intended to build on the foundation established in course 1 by linking diversity and inclusion initiatives to strategic innovation.

In addition to the two required courses, students in this specialization must choose at least 2 courses from the following list of electives. These 3 courses were deemed highly relevant to the specialization because they help to connect knowledge of EDI issues with actionable outcomes. More specifically, Managing Change focuses on strategies for overcoming organizational inertia, which is key to enacting meaningful change in enhancing equity, diversity, and inclusion. Power & Politics focuses on power structures within organizations and strategies for dealing with these structures, which often disadvantages groups who are traditionally under-represented or devaluated within business organizations. Finally, the Art and Science of Leadership focuses on how to communicate with and be a role-model for organizational members, including how common stereotypes and prototypes of leaders may constrain or facilitate this process. The knowledge acquired in these elective courses should provide students with tools that will better equip them to drive EDI related change within organizations.

COURSE NUMBER	TITLE
ORGS 6350 3.00	Managing Change
ORGS 6400 3.00	Power and Politics in Organizations
ORGS 6650 3.00	The Art and Science of Leadership

Teaching Resources:

The elective courses are already being taught in the MBA programs and most of them include multiple sections every year. The two new required courses will be offered at least once every year and each course could be taught by several full-time or part-time faculty members of the ORGS area.

Impact on Existing Programs:

We do not anticipate any adverse reactions of this specialization on existing programs or specializations. Indeed, we may be able to attract more instructors given that the specialization covers topics that have wide appeal.

Consultation:

The ORGS area, the Associate Dean Academic, and the Associate Dean Students, have all been consulted. They support the motion to launch the new Specialization within the MBA program.

Memo

To: Schulich Faculty Council

From: Kevin Tasa, ORGS Area Coordinator

Date: April 19, 2022

Re: Creation of Two New MBA courses in Organization Studies

Motion 1: That Faculty Council approve the new course: ORGS 6600 Diversity and Inclusion

Motion 2: That Faculty Council approve the new course: ORGS 6610 EDI for Strategic Innovation

Rationale:

The two courses will form the required foundation for MBA students who enrol in the new ORGS specialization: Leading Equitable, Diverse, and Inclusive Organizations.

The first course, ORGS 6600, has been delivered in the BBA program for the past three years with full enrolment each time. The central focus of this course is to help learners explain and understand how personal identity, privilege and biases shape workplace experiences and how to shape organizational practices to be more inclusive.

The second course, ORGS 6610, builds on the first course to examine the role of organizations in creating and promoting more equitable practices, and the broader implications for such policies on organizational outcomes.

New Course Proposal Form

Schulich School of Business

The following information is required for all new course proposals. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

All new course proposals must include a library statement, course outline and motion document. Provide evidence of consultation, where appropriate.

1. Responsible Program:
Schulich MBA

2. Responsible Unit:
ORGS

3. Subject Code (Rubric) and Course Number:
ORGS 6600

4. Credit Value:
3.00

5. Long Course Title: Diversity and Inclusion in Organizations

6. Short Course Title:
Diversity and Inclusion in Organizations

7. Effective Term/Calendar Year:
Effective Fall 2022

8. Language of Instruction:

9. Calendar (Short) Course Description:
This course examines diversity (broadly defined to include culture, gender, race, sexual orientation, ability, etc.), the individual experience of diversity, and how organizations leverage opportunities of diversity and also navigate challenges that diversity can bring if mismanaged.

10. Expanded Course Description:
This course examines diversity (broadly defined to include culture, gender, race, sexual orientation, ability, etc.), the individual experience of diversity including identity and authenticity, and how organizations can leverage opportunities of diversity and also

navigate challenges that diversity can bring if mismanaged. Students will have the opportunity to critically reflect on topics such as intersectionality, building relationships across difference, the business case for diversity, and supporting organizational goals through inclusion.

11. Course Learning Outcomes:

The main goals of this course are to:

- (a) reflect on aspects of personal identity that shape employee's experiences
- (b) explain how privilege and bias influence organizational effectiveness,
- (c) describe how to craft more effective relationships in diverse organizations,
- (d) describe current diversity and inclusion practices in organizations, and
- (e) propose ways to enhance inclusion based on course content after analyzing an organization's current approach to leading diversity and inclusion.

12. Rationale:

There is a gap in the course offerings by ORGS in the MBA program. Current courses rarely touch on issues of individual identity, bias, privilege and stereotypes relating to social groups (race, gender, ability, sexual orientation etc.), all of which are central to diversity and inclusion practices in organizations. This course will partially fill that gap and also serve as a core course in the new ORGS specialization focusing on EDI issues.

13. Evaluation:

Your course grade is a weighted average of the following evaluation components. In the table below, the impact of each task on your final grade for the course is indicated in the "% weight" column.

Assignment/Task	Quantity	% Weight	Total %	Author
Course Contribution – In-class	1	20%	20%	Individual
Online Participation	1	5%	5%	Individual
Personal Reflection – Paper	1	25%	25%	Individual
Personal Reflection – Presentation	1	10%	10%	Individual
Group Project – Paper	1	25%	25%	Group
Group Project – Presentation	1	15%	15%	Group
			100%	

14. Integrated Courses:

Not applicable.

15. Cross-listed Courses:

Not applicable.

16. Enrolment Notes:

The course will be open to all MBA students and will also be a required course in the new specialization.

17. Faculty Resources:

We expect to offer this course once per year. ORGS faculty who can teach the course include Brent Lyons, Ivona Hideg, Winny Shen, Ruodan Shao and Luke Zhu.

18. Physical Resources:

No additional physical resources are required.

19. Bibliography and Library Statement:

To be provided prior to Faculty Council.

New Course Proposal Template

(Part B - Schulich Use Only)

20. Instructors and Faculty Coordinator

Initial instructor:
Brent Lyons

Alternative instructors:
ORGS faculty members, including Ivona Hideg, Winny Shen, Ruodan Shao and Luke Zhu.

Course coordinator:
The ORGS area coordinator will serve as the course coordinator.

21. Specializations

Primary area or specialization:
ORGS

Secondary areas or specializations:
Not applicable

22. Student Contact and Enrolment

Contact hours:
36 Contact Hours per Semester.

Maximum enrolment:
Max enrolment is 45 students.

Expected enrolment:
The BBA version of this course has been offered once each Fall semester since 2019. The course has been at capacity with waiting lists each time.

Evidence for enrolment expectations:
The BBA version of this course has been offered once each Fall semester since 2019. The course has been at capacity with waiting lists each time.

23. Human Participants Research

N/A

24. Conditions for Approval

If this proposal is for a new elective course, please indicate which one of the following conditions required by Faculty Council applies:

- a) The Area is deleting courses with at least the same total number of credits.
- b) Provide a convincing case for the proposed course.
This course will be a core course in the newly formed ORGS specialization in EDI. Demand is expected to be high and should not adversely impact existing elective courses in the area, most of which have multiple sections each year and frequently have wait lists.

Originator:

Kevin Tasa

Signature

April 21, 2022

Date

Kevin Tasa

Name

ORGS Area Coordinator

Area or Specialization

Supporting Faculty Members

The course originator should consult with other interested parties and obtain their support. Support should be obtained from other units of the university if their interests are related to this course.

The faculty members whose names appear below (minimum 6) confirm that they have examined this course proposal. They feel it is a worthwhile addition to the SSB curriculum and does not, to their knowledge, significantly duplicate the content of existing courses.

Ashwin Josh

MBA Program Director

Giri Kanagaretanam

Associate Dean, Students

Charles Cho

SUST

Ivona Hideg

ORGS

Winnie Shen

ORGS

Luke Zhu

ORGS

Approvals

Area or Specialization:

I have reviewed this course proposal with the faculty members of this Area or Specialization, and I support the addition of the course to the SSB curriculum.

Kevin Tasa
Signature

April 21, 2022
Date

Kevin Tasa
Name of Coordinator or Director

ORGS
Area or Specialization

Degree Program:

I support the addition of the course to the SSB curriculum.

Ashwin Joshi
Signature

April 21, 2022
Date

Ashwin Joshi
Name of Program Director

MBA
Program

Program Committee:

This course proposal has received the approval of the relevant Program Committee and documentation attesting to the faculty member support for the course has been received and archived by the committee chair.

Marcia Annisette
Signature

April 28, 2022
Date

Marcia Annisette
Name of Committee Chair

MPC
Committee

ORGS 6600 3.0: Diversity and Inclusion in Organizations



Course Outline
Fall 2022

Day: TBD
Room: TBD, Seymour Schulich Building

Instructor
Dr. Brent Lyons
Room N303C, Seymour Schulich Building
blyons@schulich.yorku.ca
Office hours: by appointment

Assistant
Carla D'Agostino
N303A, SSB
416-736-5095
cdagostino@schulich.yorku.ca

Course Description

This course examines diversity (broadly defined to include culture, gender, race, sexual orientation, ability, etc.), the individual experience of diversity including identity and authenticity, and how organizations can leverage opportunities of diversity and also navigate challenges that diversity can bring if mismanaged. Students will have the opportunity to critically reflect on topics such as intersectionality, building relationships across difference, the business case for diversity, and supporting organizational goals through inclusion.

Prerequisite: ORGS 5100

Course Learning Outcomes

The main goals of this course are to:

- (a) reflect on aspects of personal identity that shape employee's experiences
- (b) explain how privilege and bias influence organizational effectiveness,
- (c) describe how to craft more effective relationships in diverse organizations,
- (d) describe current diversity and inclusion practices in organizations, and
- (e) propose ways to enhance inclusion based on course content after analyzing an organization's current approach to leading diversity and inclusion.

Deliverables at a Glance

Your course grade is a weighted average of the following evaluation components. In the table below, the impact of each task on your final grade for the course is indicated in the “% weight” column.

Assignment/Task	Quantity	% Weight	Total %	Author
Course Contribution – In-class	1	20%	20%	Individual
Online Participation	1	5%	5%	Individual
Personal Reflection – Paper	1	25%	25%	Individual
Personal Reflection – Presentation	1	10%	10%	Individual
Group Project – Paper	1	25%	25%	Group
Group Project – Presentation	1	15%	15%	Group
			100%	

Course Material

Reading material for the course has been organized in two main locations, course kits and Course Materials Database. There will be no textbook for this course. You are expected to come to each class having completed the required readings.

1. Course kits: Preparatory readings have been selected and are available in course kits for purchase from the York University Bookstore. You must purchase a course kit to access these readings
2. Canvas: Your professor will post weekly readings (not in the course kits) to Canvas.

Classroom Expectations

Student Preparation

An important teaching vehicle is interactive reflection and discussion. Reading assignments, short simulation exercises, debates and videos have also been chosen to expand your opportunities to learn, discuss and debate. Class preparation and contribution is therefore a key factor in the success of the course. You are expected to come to each class having read the assigned readings and contribute to the class discussion. A willingness to openly share experience, knowledge and perspectives in class is crucial.

Respectful Classroom Environment

This course touches on topics that may be personal, sensitive and difficult. The course is designed to be comfortable for you but to also challenge you to learn from one another and about yourselves. The professor is committed to creating a safe and positive learning environment so that students can fully engage with course topics and one another. All members of the class will be expected to maintain respect toward one another and be open to different perspectives and experiences. Any disrespect, whether it be in the form of disparaging remarks, harassment, exclusion, or related retaliation, will not be tolerated.

Class-by-Class Syllabus

Topics, readings, and other preparations for every class are listed below. However, students should always refer to the Canvas for up to date information related to class preparation.

Date Class 1	<p>Introduction to Diversity</p> <p>In this first class, we'll introduce the concept of diversity that will guide us through the subsequent 11 classes. We'll begin by discussing challenges faced by organizations in harnessing the benefits of diversity, including exclusion, inequality, inter-group stereotypes and bias. In-class activities will cover an ice-breaker, inter-group stereotypes and bias.</p> <p>Required Readings:</p> <ol style="list-style-type: none"> 1. Solovic, S. W. (2010, July). Workplace stereotyping: A silent productivity destroyer. The Huffington Post. Retrieve from: http://www.huffingtonpost.com/susan-wilson-solovic/workplace-stereotyping-a_b_564233.html <p>In-class Activity:</p> <ol style="list-style-type: none"> 1. Implicit Bias Test 2. Starbucks Training Case Study 3. TED Talk: The Power of Diversity Within Yourself
Date Class 2	<p>Identity and Authenticity</p> <p>In this second class, we begin our focus on individual employees' experience of identity. We'll discuss identity and authenticity in relation to diversity and the pros and cons of bringing one's whole self to work for individuals and organizations. We'll reflect on personal experiences with diversity and opportunities and challenges to being authentic in organizations. In-class activities will cover how diversity of one's personal and professional networks relates to experiences of authenticity at work.</p> <p>Required Readings:</p> <ol style="list-style-type: none"> 1. Eyl, E. (2014, November). Apple CEO Tim Cook on bringing your whole self to work. LinkedIn. Retrieve from: https://www.eryceyl.com/2014/11/04/apple-ceo-tim-cook-on-bringing-your-whole-self-to-work/ 2. Jackson, J. (2015). Why I don't bring my whole self to work. Blavity. Retrieve from: https://blavity.com/dont-bring-whole-self-work 3. Phillips, K. W., Dumas, T. L., & Rothbard, N. P. (2018). Diversity and authenticity. Harvard Business Review, 96(2), 132–136. Retrieve from: http://researchguides.library.yorku.ca/HBR <p>In-class Activity:</p> <ol style="list-style-type: none"> 1. How Diverse is Your Universe?
Date Class 3	<p>Individual Identity Strategies</p> <p>In our third class, we'll examine the strategies that individuals adopt to navigate diverse and multicultural organizations in order to overcome stereotypes and bias and achieve</p>

career goals. We'll discuss how identity relates to such strategies and in particular we'll focus on impression management tactics and the development of multicultural competencies. In-class activities will cover minority employees' impression management choices and personal reflection on our own tactics for achieving career success.

Required Readings:

1. Kang, S.K., DeCelles, K.A., Tilcsik, A., & Jun, S. (2016). Whitened resumes: Race and self-presentation in the labor market. *Administrative Science Quarterly*, 61, 469-502. (permalink on Canvas)

In-class Activity:

1. The Multicultural Self

Date Class 4	<p>Multiple Identities and Intersectionality</p> <p>In this class we'll complicate our focus on identity and examine how people have multiple and overlapping identities that contribute to their experiences of exclusion and inequality in organizations. We'll discuss intersectionality and the limitations of considering identities in isolation and the benefits of considering identities as multiple and overlapping. We will also consider limitations of an intersectional approach. In-class activities will cover how personal narratives can be informative of the complex ways in which identity impacts employees' experiences of exclusion and inequality.</p>
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Required Reading

1. Collins, P. H., & Bilge, S. (2016). What is intersectionality? In Collins, P.H., & Bilge, S. (Eds.), *Intersectionality*, (pp. 1-30). Cambridge, UK: Polity. (coursekit)

In-class Activities

1. The Danger of a Single Story

Date Class 5	<p>Positive Relationships</p> <p>In this class we move from our focus on individuals to relationships in organizations. We'll discuss the nature of relationships across social identity group differences and how employees' memberships to majority and minority social groups impact relationship development. We will discuss privilege and identity threat as hurdles to relationship development and employees' authenticity and we'll discuss strategies for positive relationship development that can help smooth inter-group interactions. The in-class activity will be an exercise that involves reflection on majority group privilege and overcoming barriers to positive relationship development.</p>
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Required Reading:

1. Roberts, L. M., (2007). From proving to becoming: How positive relationships create a context for self-discovery and self-actualization. In J. Dutton and B. Rose Ragins (Eds.), *Exploring Positive Relationships at Work: Building a Theoretical and Research Foundation*. Lawrence Erlbaum Associates. (course kit)
2. Romano, M.J., (2018). White privilege in a white coat: How racism shaped my medical education. *Annals of Family Medicine*, 16, 1-4 .(permalink on Canvas)

In-class Activity:

1. Simulation activity: Building effective relationships across difference at work	
Date	Thanksgiving – No Class
Date Class 6	Personal Reflection Presentation – Day 1
	ASSIGNMENT DUE: Personal Reflection Paper due at beginning of class.
Date Class 7	Personal Reflection Presentation – Day 2
Date Class 8	<p>The Business Case for Diversity</p> <p>In this class we move from our focus on individuals and relationships to organizational approaches to diversity. We'll discuss the business rationale for diversity, including a discussion of diversity management and the impact of diversity management on organization financial performance. We will also discuss the pros and cons of the business case for diversity in regard to employee authenticity, exclusion, inequality, and organizational effectiveness.</p> <p>For the in-class activity we will debate the merits of the business case for diversity.</p> <p>Required Reading</p> <ol style="list-style-type: none"> 1. Linnehan, F.L. & Konrad, A. (1999). Diluting diversity: Implications for intergroup inequality in organizations. <i>Journal of Management Inquiry</i>, 4, 399-414. (permalink on Canvas) <p>In-class Activities:</p> <ol style="list-style-type: none"> 1. TED Talk: How Language Shapes the Way We Think
Date Class 9	<p>Inclusion and Exclusion</p> <p>In this class we discuss inclusion in depth. We will compare inclusion to the business case for diversity and diversity management (from our previous class) to understand how they differentially impact employees' experiences of exclusion, inequality, and authenticity in organizations. In doing so, we will highlight the benefits of taking an inclusion approach to harnessing diversity. We'll also examine the different ways in which inclusion has been defined and implemented in practice and limitations of current knowledge about what makes inclusion effective in organizations. Activities in today's class will focus on problem-solving in real-world cases of inclusion and exclusion.</p> <p>Required Reading:</p> <ol style="list-style-type: none"> 1. Thomas, D. & Ely, R. (1996). Making differences matter: A new paradigm for managing diversity. <i>Harvard Business Review</i>. Retrieve from: http://researchguides.library.yorku.ca/HBR <p>In-class Activity:</p> <ol style="list-style-type: none"> 1. Design an Inclusive Interview Protocol for a Fortune 500 Organization

Date Class 10	<p>Diversity & Inclusion Interventions</p> <p>In this class we will integrate knowledge from all of our earlier classes to discuss practical diversity and inclusion interventions for businesses to most effectively harness the benefits of diversity for employees' and organizations. We will discuss diversity and inclusion interventions commonly adopted by contemporary businesses, including why they sometimes succeed and sometimes fail. In-class activities will involve critical reflection on "best practice" approaches to diversity and inclusion and the development "tips and tricks" to improve diversity and inclusion interventions.</p> <p>Required Reading:</p> <ol style="list-style-type: none"> 1. Dobbin, F. & Kalev, A. (2016). Why diversity programs fail. Harvard Business Review. Retrieve from: http://researchguides.library.yorku.ca/HBR <p>In-class Activity</p> <ol style="list-style-type: none"> 1. TED Talk: How to Get Serious About Diversity and Inclusion in the Workplace
Date Class 11	<p>Diversity & Inclusion in Practice – Guest Speaker</p> <p>In this class, a guest speaker who works in the business of diversity and inclusion will share their perspective and experiences regarding the practice of inclusion in the contemporary Canadian business context.</p>
Date Class 12	<p>Group Presentations</p> <p>ASSIGNMENT DUE: Group Report due at beginning of class.</p>

Evaluation of Written Assignments, Projects, Contribution, and Exams

Course Contribution – In-class Participation (20%)

Given that mutual learning is an essential objective, you are expected to come to each class having read the assigned readings and contribute to the class discussion. Reading assignments, simulation exercises, debates and videos have also been chosen to expand learning through discussion and debate. Class participation around these activities and discussion of the readings is therefore a key factor for success in the course.

Each day after class I review each student's contribution to class discussion and assign it from -1 to 4 points noting absences, illnesses, and students who had their hands up but were not called on.

- Students who are absent receive 0;
- those who are present but say nothing receive 1;
- those who offer topical information or provide factual information from the reading/case to advance the class discussion receive 2;
- those who contribute by building on or challenge comments made in class in ways that elicit student learning receive 3;
- those who demonstrate an ability to analyze/apply course material and are willing to take risks in attempting to answer difficult questions receive 4.
- Finally, those who are clearly unprepared, fail to listen, arrive late to class, and are disruptive or disrespectful -1.

Halfway through the course I will provide all students with individual feedback on their course participation with a specific point score and how that score compares with the rest of the class.

Online Participation (5%)

You will complete an online quiz via Canvas before each class (starting in week 2). Two days before Class # 2, 3, 4, 5, 8, 9, and 10 I will post a quiz to Canvas. Each quiz will contain five multiple choice questions and will test on material covered in the assigned readings for that week. The quizzes are open-book and are designed to help you keep up with course readings. You are to complete 5 of the 7 quizzes and each quiz is worth 1% of your final grade. If you choose to complete more than 5 quizzes, then the top five scoring quizzes will count toward your final grade.

Personal Reflection – Paper (15%)

You will write a five-page paper (double-spaced, 12-pt font) about how your identities (multiple and intersecting) shape your personal story and how your story can facilitate achieving your career goals.

In this assignment you will examine your life story, personality, and values—with emphasis on the influences of your identities—to describe your personal story. Crafting a personal story around your identities is an essential skill to achieve desired outcomes in organizations (e.g., applying for a job; interviewing for a position). You are encouraged to keep track of your thoughts/ideas about yourself over the semester to help craft your story as we discuss topics such as “Authenticity” and the “Identity Management.” Your paper will be treated with the utmost confidence and will not be shared with anyone else in the class.

You will submit a hard copy of the report at the beginning of Class 6, Oct 21.

Personal Reflection – Presentation (10%)

During Classes 6 (Oct 21) and 7 (Oct 28) you will present your personal reflection to the class in a 10-minute oral presentation. Grading of the presentation will be based on the following:

1. Presentation skills (e.g. eye contact, hand gestures, voice, effective use of visual aids)
2. Integration of course concepts
3. Creativity/Originality
4. Effective responses to questions

Group Project – Paper (25%)

You will have a comprehensive team project during the semester. The group project is designed to test you on your ability to apply course concepts to develop a practical inclusion intervention for a real business. Groups of 4-5 students will draw on course concepts and design an intervention for a familiar organization. For instance, you may choose to focus on an organization that has been highlighted in the news for diversity issues or an organization where you have worked. The report should include an analysis of the organization’s purpose, environment, mission, vision, values, goals, strategy, demographic composition, culture, diversity issue to be addressed by the intervention, and a description of the intervention. You must integrate multiple concepts covered in class and demonstrate an in-depth understanding of those concepts. Your intervention must be practical and realistic.

In addition to class and text materials, groups may also use newspaper and media articles, surveys or interviews conducted by the team or other materials relevant to understanding the organization and the appropriateness of your inclusion intervention.

The written report is meant to provide an overview of your analysis and intervention and must be no more than 3000 words. You should reference all sources. Appendices may be added if relevant (not included in the

word count). Note that your written report needs to stand-alone and provide a complete discussion of your analysis and intervention.

Grading of the report will be based on:

1. Content, quality of analysis, thoroughness and accuracy – 50%
2. Organization and flow – 20%
3. Presentation and style of the report – 15%
4. Originality and creativity – 15%

The report is due in hard copy prior at the beginning of class 12 on Dec 2.

Group Project – Presentation (15%)

During Class 12 as a group you will present your analysis and intervention plan in a 15-minute oral presentation followed by 5 minutes of Q&A.

Grading of the presentation will be based on the following:

1. Presentation skills (e.g. eye contact, hand gestures, voice, effective use of visual aids)
2. Integration of course concepts
3. Relevance of analysis
4. Practicality of intervention
5. Creativity/Originality
6. Effective responses to questions

Calculation of Course Grade

In this course, final course grades will be determined by the following process: All assignments and projects will be marked using the letter grades from A+ through F. To calculate the final grade, letter grades for each assignment will be translated into grade points using the conversion scheme detailed below. These are then added using the percentage weight of each assignment and rounded up or down to the nearest full grade point, which is finally translated back into the corresponding letter grade.

Letter Grade	A+	A	A-	B+	B	B-	C+	C	C-	F
Grade Points	9	8	7	6	5	4	3	2	1	0

General Academic Policies: Grading, Academic Honesty, Accommodations and Exams

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

For more details on the index, grading policy, and grade point average (GPA) requirements, see the Student Handbook or the Student Services & International Relations website:

http://schulich.yorku.ca/client/schulich/schulich_lp4w_ind_webstation.nsf/page/Academic+Policies+BBA?OpenDocument

Academic honesty is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found in the Student Handbook and on the Student Services & International Relations website:

http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_ind_webstation.nsf/page/Academic+Honesty!OpenDocument

Accommodations. For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services.

For counseling & disability services, contact Student Services or see <http://www.yorku.ca/cds/>.

New Course Proposal Form

Schulich School of Business

The following information is required for all new course proposals. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

All new course proposals must include a library statement, course outline and motion document. Provide evidence of consultation, where appropriate.

1. Responsible Program:
Schulich MBA

2. Responsible Unit:
ORGS

3. Subject Code (Rubric) and Course Number:
ORGS 6610

4. Credit Value:
3.00

5. Long Course Title: Equity, Diversity & Inclusion for Strategic Innovation: Facts, Models and Practice

6. Short Course Title:
EDI for Strategic Innovation

7. Effective Term/Calendar Year:
Effective Fall 2022

8. Language of Instruction:

9. Calendar (Short) Course Description:

This course aims to provide present and future leaders with competencies in EDI to be effective at improving the performance and well-being of their teams, organizations and communities. The course is an argument for the proposition that, under specific circumstances, EDI can be a driver for innovation that results in improved firm performance and resilience in three key areas: deeper employee engagement, stronger ties to stakeholders and achieving higher levels of sustainable above average financial returns.

10. Expanded Course Description:

To thrive in multicultural settings and global business contexts, it is critical that present and future leaders gain competencies in EDI to be effective at improving the performance and well-being of their teams, organizations and communities. The course is an argument for the proposition that, under specific circumstances, EDI can be a driver for innovation that results in improved firm performance and resilience in three key areas: deeper employee engagement, stronger ties to stakeholders and achieving higher levels of sustainable above average financial returns. In short, today diversity is core to career and business success.

The course also invites the learner to discover and engage with three key reasons for teams, organizations and communities to leverage and/or increase internal diversity:

- In pursuit of human dignity and social justice;
- To map the diversity of their target client/ user base; and,
- To map the diversity of the problems that they face.

You can expect to learn and practice how to be consistently inclusive, to remain open to multiple ways of being and doing, and to be a champion for the full participation of members of diverse and cross-functional teams in support of greater business innovation and increased firm value.

11. Course Learning Outcomes:

The main goals of this course are to:

- Demonstrate knowledge at the intersection of diversity and business innovation in the service of effective corporate strategy and firm performance, and the ability to share this knowledge.
- Learn to recognize the roles that organizations and business leaders can play in creating social change, including more equitable and diverse organizations in pursuit of business for good, that is, business as a solution to tackle the world's large and persistent problems.
- Learn to recognize differences in stakeholders and to think, speak and behave to show effective leadership across differences, and leverage differences for business innovation.
- Demonstrate a sensitivity to path dependencies and the ability to recognize relevant ethical considerations to formulate practical responses to the demands placed on business for social justice as it applies to anti-Black and anti-Indigenous racisms, and other forms of discrimination.

12. Rationale:

There is a gap in the course offerings by ORGS in the MBA program as evidenced by growing concerns about our lack of attention to EDI issues in the curriculum. This course, and the new specialization in the ORGS area, will partially fill that gap by offering students an opportunity to develop deeper understanding of these issues.

13. Evaluation:

Your course grade is a weighted average of the following evaluation components.

Assignment/Task	Quantity	% Weight	Total %	Author	Due
Journal Entries/ Blog Posts	1	5%	5%	Individual	Class 2
Journal Entries/ Blog Posts	1	5%	5%	Individual	Class 4
Journal Entries/ Blog Posts	1	5%	5%	Individual	Class 6
Journal Entries/ Blog Posts	1	5%	5%	Individual	Class 8
Reflection Essays	1	35%	35%	Individual	Class 9
Group Project or Presentation	1	35%	35%	Group	Class 11
Class Participation	N/A	10%	10%	Individual	N/A
			100%		

14. Integrated Courses:

Not applicable.

15. Cross-listed Courses:

Not applicable.

16. Enrolment Notes:

The course will be open to all MBA students and will also be a required course in the new ORGS specialization focusing on EDI.

17. Faculty Resources:

We expect to offer this course once per year. ORGS faculty who can teach the course include Brent Lyons, Ivona Hideg, Winny Shen, Ruodan Shao and Luke Zhu. The originator of the course, Jean-Jacques Rousseau, will serve as a sessional instructor and teach the course initially.

18. Physical Resources:

No additional physical resources are required.

19. Bibliography and Library Statement:

To be provided prior to Faculty Council.

New Course Proposal Template (Part B - Schulich Use Only)

20. Instructors and Faculty Coordinator

Initial instructor:

Jean-Jacques Rousseau

Alternative instructors:

ORGS faculty members, including Ivona Hideg, Winny Shen, Ruodan Shao and Luke Zhu.

Course coordinator:

The ORGS area coordinator will serve as the course coordinator.

21. Specializations

Primary area or specialization:

ORGS

Secondary areas or specializations:

Not applicable

22. Student Contact and Enrolment

Contact hours:

36 Contact Hours per Semester.

Maximum enrolment:

Max enrolment is 45 students.

Expected enrolment:

Demand for our BBA course called Diversity and Inclusion has consistently exceeded capacity. We expect that to also be the case at the MBA level.

23. Human Participants Research

N/A

24. Conditions for Approval

If this proposal is for a new elective course, please indicate which one of the following conditions required by Faculty Council applies:

- a) The Area is deleting courses with at least the same total number of credits.
- b) Provide a convincing case for the proposed course.
This course will be a core course in the newly formed ORGS specialization in EDI. Demand is expected to be high and should not adversely impact existing elective courses in the area, most of which have multiple sections each year and frequently have wait lists.

Originator:

Kevin Tasa

Signature

April 21, 2022

Date

Kevin Tasa

Name

ORGS Area Coordinator

Area or Specialization

Supporting Faculty Members

The course originator should consult with other interested parties and obtain their support. Support should be obtained from other units of the university if their interests are related to this course.

The faculty members whose names appear below (minimum 6) confirm that they have examined this course proposal. They feel it is a worthwhile addition to the SSB curriculum and does not, to their knowledge, significantly duplicate the content of existing courses.

Ashwin Josh

MBA Program Director

Giri Kanagarethnam

Associate Dean, Students

Charles Cho

SUST

Ivona Hideg

ORGS

Winnie Shen

ORGS

Brent Lyons

ORGS

Approvals

Area or Specialization:

I have reviewed this course proposal with the faculty members of this Area or Specialization, and I support the addition of the course to the SSB curriculum.

Kevin Tasa
Signature

April 21, 2022
Date

Kevin Tasa
Name of Coordinator or Director

ORGS
Area or Specialization

Degree Program:

I support the addition of the course to the SSB curriculum.

Ashwin Joshi
Signature

April 21, 2022
Date

Ashwin Joshi
Name of Program Director

MBA
Program

Program Committee:

This course proposal has received the approval of the relevant Program Committee and documentation attesting to the faculty member support for the course has been received and archived by the committee chair.

Marcia Annisette
Signature

April 28, 2022
Date

Marcia Annisette
Name of Committee Chair

MPC
Committee

Equity, Diversity & Inclusion for Strategic Innovation: Facts, Models and Practice

Course Outline Fall 2022

<Class day[s]>, <Time>, beginning on <month/day>
 <Class location>
 <Lab day>, <Time> (if applicable)
 <Lab location> (if applicable)

Instructor

Jean-Jacques Rousseau, PhD, MBA
 <Office location (e.g., N100, Seymour Schulich Building)>
 <Phone (use Area or support staff number)>
 <E-mail>

Office hours: By appointment

Assistant

<Name>
 <Office>
 <Phone>
 <E-mail>

Jean-Jacques Rousseau is a philosopher of science (PhD, UofT 2016) and Schulich graduate (MBA 2006) with a practice at the intersection of tech, entrepreneurship and ideas. In this course he will argue that, in addition to its social justice core, the bundle of equity, diversity and inclusion (EDI) can be a driver of innovation.

The course is transdisciplinary, drawing from his varied background. Jean-Jacques is the Postdoctoral Fellow in Explainability & Trust in AI Systems at the Lassonde School of Engineering at York University. He is also an advisor to the Office of the Dean at the Schulich School of Business in support of integrating EDI learning outcomes into core MBA courses. He was Inaugural Technical Advisor in Innovation, Science and Competitiveness to the President of the Republic of Haiti, and held various senior positions in the Ontario Public Service, spanning from infrastructure financing, economic and budgetary policy, community safety, investment attraction and science-based innovation policy.

Course Description

To thrive in multicultural settings and global business contexts, it is critical that present and future leaders gain competencies in EDI to be effective at improving the performance and well-being of their teams, organizations and communities. The course is an argument for the proposition that, under specific circumstances, EDI can be a driver for innovation that results in improved firm performance and resilience in three key areas: deeper employee engagement, stronger ties to stakeholders and achieving higher levels of sustainable above average financial returns. In short, today diversity is core to career and business success.

The course also invites the learner to discover and engage with three key reasons for teams, organizations and communities to leverage and/or increase internal diversity:

- In pursuit of human dignity and social justice;
- To map the diversity of their target client/ user base; and,
- To map the diversity of the problems that they face.

You can expect to learn and practice how to be consistently inclusive, to remain open to multiple ways of being and doing, and to be a champion for the full participation of members of diverse and cross-functional teams in support of greater business innovation and increased firm value.

Prerequisite: None but ORGS 4600 and first-year MBA courses are recommended

Course Learning Outcomes

The main goals of this course are to:

- Demonstrate knowledge at the intersection of diversity and business innovation in the service of effective corporate strategy and firm performance, and the ability to share this knowledge.
- Learn to recognize the roles that organizations and business leaders can play in creating social change, including more equitable and diverse organizations in pursuit of business for good, that is, business as a solution to tackle the world's large and persistent problems.
- Learn to recognize differences in stakeholders and to think, speak and behave to show effective leadership across differences, and leverage differences for business innovation.
- Demonstrate a sensitivity to path dependencies and the ability to recognize relevant ethical considerations to formulate practical responses to the demands placed on business for social justice as it applies to anti-Black and anti-Indigenous racisms, and other forms of discrimination.

Deliverables at a Glance

Your course grade is a weighted average of the following evaluation components.

Assignment/Task	Quantity	% Weight	Total %	Author	Due
Journal Entries/ Blog Posts	1	5%	5%	Individual	Class 2
Journal Entries/ Blog Posts	1	5%	5%	Individual	Class 4
Journal Entries/ Blog Posts	1	5%	5%	Individual	Class 6
Journal Entries/ Blog Posts	1	5%	5%	Individual	Class 8
Reflection Essays	1	35%	35%	Individual	Class 9
Group Project or Presentation	1	35%	35%	Group	Class 11
Class Participation	N/A	10%	10%	Individual	N/A
			100%		

Course Material

Required and supplementary reading for this course includes the following texts. Some are available for purchase from the York University Bookstore (<http://bookstore.blog.yorku.ca>):

1. Course kit with select articles and chapters (as identified in the 'Class-by-Class' section below).

Supplementary reading for this course includes the following book:

1. Chris Ryan and Carrie Shucart, *MBA Math & More: Concepts You Need in Your First Year of Business School*. MG Prep Inc., 2018.

The course kit is available for purchase from the York University Bookstore.

The Course Materials Database (CMD) has been created within Schulich's Lotus Notes. It contains general information for Schulich students and information and materials specific to this course. Check it frequently.

Classroom Expectations

Prerequisite

This course is open to any student registered in a graduate program at the Schulich School of Business who is curious, wants to make a positive difference in the world, and is excited at the chance to practice the skills of a self-directed learner. Note that the course assumes acquaintance with business topics normally covered in first-year core MBA courses. It is recommended that students are familiar with foundational topics covered in ORGS 4600 3.0: Diversity and Inclusion in Organizations.

Preparation

Students are expected to complete all readings and view any other assigned media prior to class. It helps to possess a high-level awareness of current affairs. Lectures will do less 'hand holding' and instead take the form of a graduate seminar. As such, each student should be prepared to share their learnings and questions.

Class Participation

To participate in class, one must be present. This is the first step. As guidance, note that a quality contribution to a class discussion brings together the following elements. The contribution is:

- Inclusive and acknowledging of diversity.
- Relevant to the topic at hand.
- Engages with what has been said before.
- Demonstrates acquaintance with course work.
- Situated in the context of current events and trends.
- Advances the discussion.

The course provides opportunities to engage in conversations that some learners find uncomfortable. To maintain an environment that is safe for everyone, please note that there are attitudes to avoid at all costs. A quality contribution is never:

- Rude, Flippant, Judgmental, Belittling, Dismissive, Intolerant, and Condescending

If the Instructor or another participant makes a misstep but when made aware of it immediately seeks to redress the situation, we agree in advance to define this behaviour as “unintentional” and to embrace it as a learning opportunity for everyone.

Land Acknowledgement

The York University Equity, Diversity, and Inclusion Strategy 2022-2027 states that the university, “will act to understand the inherent rights and entitlement of Indigenous peoples, Indigenous ways of knowing & being, and recognizing the importance of education, relationship building, and reconciliation in advancing Indigenous priorities”.

It is in this spirit that you are encouraged to reflect on the following Land Acknowledgement statement:

We recognize that many Indigenous Nations have long standing relationships with the territories upon which York University campuses are located that precede the establishment of York University.

York University acknowledges its presence on the traditional territory of many Indigenous Nations. The area known as Tkaronto has been care taken by the Anishinabek Nation, the Haudenosaunee Confederacy, and the Huron-Wendat. It is now home to many First Nation, Inuit and Métis communities.

We acknowledge the current treaty holders, the Mississaugas of the Credit First Nation. This territory is subject of the Dish with One Spoon Wampum Belt Covenant, an agreement to peaceably share and care for the Great Lakes region.

The above Land Acknowledgement statement may also prompt you to reflect on the diverse indigenous communities in Canada and across the world.

For example, the instructor identifies as Black and with the indigenous people known as the Taino or the Antillean Arawak from of the island of Hispaniola. When he reads Land Acknowledgement statements like the one above, he is reminded that he is a descendent of the first people to encounter Christopher Columbus, a meeting with world-historical consequences for indigenous peoples across the Americas.

Class-by-Class Syllabus

Topics, readings, and other preparations for every class are listed below

Note: If any changes in this schedule become necessary, notifications will be posted on the course CMD, and when changes need to be announced between classes, an email will be sent to students' Lotus Notes email accounts, notifying them of the change.

Class No., Date and Topic	Case Studies	Preparation: Readings, etc.	Guest Presenters
Class 1 <Date> Overview	What emojis can teach us about the default whiteness of the (American) internet	Review the syllabus Dhiraj Murthy, et al, "Understanding the meaning of emoji in mobile social payments: Exploring the use of mobile payments as hedonic versus utilitarian through skin tone modified emoji usage". Big Data & Society, July–December (2020), 1–18. Supplemental readings: She brought diverse skin tones emoji to the iPhone. Now she's suing Apple. Avoiding cultural appropriation in the digital age Thoughts on white people using dark-skinned emoji	
Class 2 <Date> The Diversity Explosion Variation and Difference Women in STEM	Declining White population proportion The Engineering Gender Gap	DUE: Journal Entry 1 of 4 "Diversity Explosion" by demographer William Frey (VIDEO) World Economic Forum. Diversity, Equity and Inclusion 4.0. University Affairs. " The engineering gap: it's more than a numbers game "	TBD on "Beyond Ethnic Food or How True Worldliness Make Leaders Better"

<p>Class 3 <Date></p> <p>Is the world safe for diversity?</p> <p>Social justice considerations</p> <p>The Deep Fake Past</p>	<p>Use of force in policing</p> <p>Why machine learning algorithms make racist and sexist predictions</p>	<p>Sam Binkley, "Anti-racism beyond empathy: Transformations in the knowing and governing of racial difference". <i>Subjectivity</i> Vol. 9, 2, 181–204.</p> <p>Wendy Hui Kyong Chun, <i>Discriminating Data</i>, 35 - 74.</p>	<p>TBD on "How racist outcomes impact trust in public institutions"</p> <p>Examples may come from policing, healthcare, sentencing and advertising</p>
<p>Class 4 <Date></p> <p>The Business Case</p> <p>AI and Its Discontents</p> <p>Algorithmic bias is bad business</p>		<p>DUE: Journal Entry 2 of 4</p> <p>Marco Iansiti and Karim R. Lakhani (2020), <i>Competing in the Age of AI</i>, 157 – 213.</p> <p>Buolamwini & Gebru (2018), Gender Shades: Intersectional Accuracy Disparities in Commercial Gender Classification</p> <p>US Federal Trade Commission. Aiming for truth, fairness, and equity in your company's use of AI.</p>	
<p>Class 5 <Date></p> <p>The Legal Case</p> <p>Human rights legislation in Canada</p> <p>Industry-level codes of conduct</p>	<p>The Government of Canada duty to consult – the pipeline debates.</p>	<p>Look up the 17 protected grounds under the Ontario Human Right Code.</p> <p>Look up the Code of Ethics for your current or intended career. What does it say about EDI? If there isn't one, be prepared to share some key elements that a code of ethics for this area should include (based on your research)</p>	<p>TBD on "Truth, Reconciliation and the Potential Impacts of Decolonization on Canadian Business"</p>

Class 6 <Date> The Strategy Case	Student proposed case study	DUE: Journal Entry 3 of 4 Sylvia Ann Hewlett et al., " How Diversity Can Drive Innovation ". Harvard Business Review, December 2013. Lecturer notes	
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NO CLASS (Reading Week)

Class No., Date and Topic	Case Studies	Preparation: Readings, etc.	Guest Presenters
Class 7 <Date> Firm Performance & Diversity Bonuses Diversity Dimensionality Employee engagement and other human capital considerations	Student proposed case study Look up the Diversity Prediction Theorem	DUE: Group project confirmed Scott Page, The Difference, 1-131.	TBD on "Producing and Using Diversity for Higher Firm Performance"
Class 8 <Date> Problem Finding	Student proposed case study	DUE: Journal Entry 4 of 4 Scott Page, The Difference, 131-174.	
Class 9 <Date> Problem Solving	Student proposed case study	DUE: Reflection Essay Lecturer notes	TBD on "Using the EDI Balanced Scorecard"
Class 10 <Date> Application I: Business Resilience	Retail during COVID	Lecturer notes	TBD on "Innovating Under Converging Crisis"

Class 11 <Date> Application II: Engaging Underserved Audiences	Race, Gender and the Future of Robots	DUE: Group Project Lecturer notes Wendy Hui Kyong Chun, Discriminating Data, 121- 138.	Group presentations
Class 12 <Date> Course Wrap Up	Incommensurability	J. Rousseau, "The Story of the Incommensurability Thesis".	Next Steps to your learning

Evaluation of Written Assignments, Projects, and Contribution

Evaluation will accommodate diverse learning styles in support of demonstrated student progress as a self-directed learner and reflective practitioner. All students will be required to do a combination of each: readings, individual and group projects. However, the weight attributed to each assigned task may be adjusted to student preference. Please note that no assignment can be less than 5% or more than 40% of the total course grade.

Journal Entries/ Blog Posts (4 instalments for a total of 20%)

Approximately 300-word personal reflections in reaction to a fragment of the assigned text that makes the link between ideas discussed in the text and issues confronted by the learner. For example, the notion of the adjacent possible is found in Scott Page, *The Diversity Bonus*, 54-67. The endnotes reference a text that itself references the original text where Stuart Kauffman first advanced the idea. You could write about how this notion developed in biology can help explain a recent disagreement you had. In addition to the text, you may add images, drawings, videos, or any other media that helps you express yourself. The journal entries may be formatted as an electronic file (MS Word, Google Sheet, Pages or PDF) or as blog posts on platforms such as Medium and LinkedIn. Your aim should be to arouse the curiosity of the Instructor-reader. You are encouraged to use the journal entries as inspiration for your class participation.

Reflection Essay (35%)

A longer piece (18 – 20 typed double-spaced pages at Arial 12 point font) that expands on a journal entry or blog post. As a graduate-level product, each essay should meet all the standard expectations of an academic piece: a clear research question, grounded in a review of the literature with references, making a coherent argument and novel proposals. Think of this as a solid draft for an article that could be published in a journal like the *Harvard Business Review*. Your aim is to minimally provide me as the instructor-reader a substantive yet compact learning opportunity.

Group Project (35%)

A venture by 3-4 learners pooling resources to confront a problem of their choice with the concepts/ tools/ methods of EDI for strategic innovation. It may be a presentation (30 minutes) or written report (2000 – 3000 words and should make generous use of the materials discussed in the course and move beyond them. It is a capstone opportunity to explore whether and how EDI is a competitive advantage that drives business innovation and firm performance in a specific business organization. It may also reflect on the challenges and limits of EDI in a real business environment. A successful project would drill down to the level of functional business area(s) and make the case for how a dimension of EDI like inclusion made a discernible contribution to the bottom line, market share, business resilience or some other element of firm performance. It may also demonstrate that EDI has failed to contribute to positive business outcomes and advance arguments as to why.

Whereas ORGS 4600 invited a group project that is “a practical inclusion intervention for a real business”, in this course you are required to evaluate EDI for measurable impact on business innovation, resilience, and bottom-line performance.

The groups should be composed with diversity in mind: of both identity and cognitive types. Make it a point to challenge your individual comfort zones and put in place a process that supports each group member in their pursuit of the common goal. The groups and projects must be pre-approved by the Instructor and cannot be modified without permission.

Class Participation (10%)

Based on attendance, and the frequency and quality of learner contributions to class discussions, with an emphasis on the later. Students who are absent receive 0.

Calculation of Course Grade

In this course, final course grades will be determined by the following process: All assignments and projects will be marked using the letter grades from A+ through F. To calculate the final grade, letter grades for each assignment will be translated into grade points using the conversion scheme detailed below. These are then added using the percentage weight of each assignment and rounded up or down to the nearest full grade point, which is finally translated back into the corresponding letter grade.

Letter Grade	A+	A	A-	B+	B	B-	C+	C	C-	F
Grade Points	9	8	7	6	5	4	3	2	1	0

General Academic Policies: Grading, Academic Honesty, Accommodations and Exams

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

For more details on the index, grading policy, and grade point average (GPA) requirements, see the Student Handbook or the Student Services & International Relations website:

http://schulich.yorku.ca/client/schulich/schulich_lp4w_ind_webstation.nsf/page/Academic+Policies+BB+A?OpenDocument

Academic honesty is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found in the Student Handbook and on the Student Services & International Relations website:

http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_ind_webstation.nsf/page/Academic+Honesty!OpenDocument

Accommodations. For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services.

For counseling & disability services, contact Student Services or see <http://www.yorku.ca/cds/>.

Schulich School of Business Nominating Slate (2022 – 2023)

Date: May 12, 2022

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Section 1: Committees Based on Area Nominations

Chair of Faculty Council: Cameron Graham

Vice Chair of Faculty Council: Luke Zhu

All Committee Mandates can be found at:

<https://teachingandlearning.schulich.yorku.ca/academic-administrative-governance/>

The committees in this section include:

PhD Program Committee
Masters Programs/Programs Coordinating Committee
BBA/iBBA Program Committee
Master's Admissions Committee
Student Affairs Committee
Committee for Equity and Diversity
Area Affirmative Action Representatives

Ph. D Program Committee

Chair: Program Director	Peter Darke
Secretary:	Stephanie Allen
Faculty Representatives:	
ACTG	Gregory Saxton
FINE	Yisong Tian
MKTG	Peter Darke
OMIS	Manus Rungtusanatham
ORGS	Ruodan Shao
SGMT	Moshe Farjoun
SUST	Maxim Voronov
Elected Student Members:	
Ph.D. Rep.	TBD
Ex Officio Voting Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Students	Kiridaran Kanagaretnam
Non-Voting Members:	
Executive Director Student Services and International Relations	Lindsay Hillcoat

Masters Programs/Programs Coordinating Committee

Chair: Associate Dean Academic	Kevin Tasa
Secretary:	Laura Da Silva
Faculty Representatives:	
ACTG	Viswanath Trivedi
ECON	Irene Henriques
FINE	Yelena Larkin
MKTG	David Rice
OMIS	David Johnston
ORGS	Luke Zhu
SGMT	Willow Sheremata
SUST	Robert Phillips
BBA/iBBA	Farrokh Zandi

Elected Student Members:	
1 st yr MBA rep.	TBD
2 nd yr MBA rep.	TBD
1 st yr IMBA rep.	TBD
2 nd yr IMBA	TBD
BBA/iBBA student rep.	TBD
BBA/iBBA student rep.	TBD
Student Rep MAcc	TBD
Student Rep MBAN	TBD
Student Rep MFIN	TBD
Student Rep MMAI	TBD
Student Rep MMGT	TBD
Student Rep MMKG	TBD
Student Rep MREI	TBD
Student Rep MSCM	TBD
Ex Officio Voting Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Students	Kiridaran Kanagaretnam
Chair, Committee for Equity and Community	Charles Cho (rep.)
Director BBA/iBBA	Mike Valente
Director MAcc	Viswanath Trivedi
Director MBA	Ashwin Joshi
Director MBAN	Julian Scott Yeomans
Director MFIN	Melanie Cao
Director MMAI	Julian Scott Yeomans
Director MMgt	Luke Zhu
Director MMKG	Grant Packard (partial sabbatical)
Director MREI	Jim Clayton
Director MSCM	David Johnston
Director MBA/JD	Peter Macdonald
Director MBA/MA, MBA/MFA	Kenneth Rogers
Director SCTE	Tom Medcof
Director Global Relations	Theodore Peridis
EE Lead	Minerva Cernea

eLearning Lead	Ingo Holzinger
MGMT 6100 Coordinator	Ingo Holzinger
Student Services Rep.	TBD
Rep IST	TBD
Rep CDC	TBD
Rep Alumni	TBD
Director, Academic Affairs	Kathryn Doyle

BBA/iBBA Program Committee

Chair: Program Director	Mike Valente
Secretary:	Nikki Jagdeosingh
Faculty Representatives:	
ACTG	Matt Bamber
FINE	Eliezer Prisman
MKTG	Ajay Sirsi (Jan 2023 – July 2023)
OMIS	Guangui (Kayla) Li
ORGS	Chris Bell
SGMT	Majid Majzoubi
SUST	Burkard Eberlein
Elected Student Members:	
1st yr BBA rep.	TBD
2nd yr BBA rep.	TBD
3rd yr BBA rep.	TBD
4th yr BBA rep.	TBD
iBBA rep.	TBD
Ex Officio Voting Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Students	Kiridaran Kanagarethnam
Assoc. Director, BBA/iBBA	Farrokh Zandi
Chair, Committee for Equity and Community	Luke Zhu
Ex Officio Non-Voting Members:	
Director SCTE	Tom Medcof
Student Services Rep.	Luba Pan

Career Centre Rep.	Phanindra Deonandan
Director, Academic Affairs	Kathryn Doyle

Master's Admissions Committee

Chair:	Kiridaran Kanagaretnam
Secretary:	
Faculty Representatives:	
	Kiridaran Kanagaretnam
	Perry Sadorsky
	Ambrus Kesckes
	Murat Kristal
	Winnie Shen
	Geoffrey Kistruck
	Charles McMillan
	Yigang Pan
Ex Officio Voting Members:	
Associate Dean Students	Kiridaran Kanagaretnam
GBC President or member of GBC	TBD
Non-Voting Members:	
Assistant Director of Recruitment and Admissions	

Student Affairs Committee

Chair	Avis Devine
Vice-Chair	Markus Giesler
Secretary	TBD
Faculty Representatives:	
	Pouyan Foroughi
	Isik Bicer
	Markus Giesler
	Avis Devine
	Sylvia Hsu
	Atipol Bhanich-Supapol
	Chris Bell
Elected Student Members:	

Masters Rep.	TBD
Masters Rep.	TBD
Undergrad Rep.	TBD
Undergrad Rep.	TBD
Ex Officio Voting Members:	
Associate Dean Academic	Kevin Tasa
Ex Officio Non-Voting Members:	
Associate Dean Students	Kiridaran Kanagaretnam
Student Services Representative	TBD

Committee for Equity and Community

Chair	Luke Zhu
Secretary	
Faculty Advisor for Equity and Community	
ACTG	Dean Neu
ECON	Alexander Coutts
FINE	Kee-Hong Bae
MKTG	TBD
OMIS	Henry Kim
ORGS	Ivona Hideg
SGMT	Theodore Peridis
SUST	Charles Cho
Elected Student Members:	
BBA/iBBA	TBD
Masters	TBD
MBA	TBD
EMBA	TBD
PhD	TBD
Ex Officio Non-Voting Member:	
Associate Dean Academic	Kevin Tasa
Director of Equity and Community	TBD
Staff representative from Student Services and International Relations	TBD

Staff representative from Student & Enrolment Services	Michelle Hughes
Executive Officer	Anwar Mustapha

Area Affirmative Action Representatives

ACTG	Cameron Graham
ECON	n/a
FINE	Ming Dong
MKTG	Markus Giesler
ORGS	n/a
OMIS	n/a
SGMT	n/a
SUST	Charles Cho

Section 2: Committees Based on Faculty Survey

Chair of Faculty Council: Cameron Graham

Vice Chair of Faculty Council: Luke Zhu

All Committee Mandates can be found at:

<https://teachingandlearning.schulich.yorku.ca/academic-administrative-governance/>

The committees in this section include:

Kellogg Schulich Executive MBA Program Committee
Research and Library Committee
Tenure and Promotions Committee
Tenure and Promotions Appeals Committee
Nominating Committee
Faculty Service Roles
Senators
Senate Committees

Kellogg-Schulich Executive MBA Program Committee

Chair	Kevin Tasa
Secretary	Ardene Harris
Associate Dean EMBA	Matthias Kipping
Faculty Representatives:	
	Ashley Konson
	Moren Lévesque
Director EMBA Global Network (Kellogg)	Melissa Holland
Assistant Dean EMBA Global Network (Kellogg)	Bernadette Birt
Assistant Dean EMBA Programs	Su-Lan Tenn
Ex Officio Voting Members:	
Associate Dean Academic	
Student Members:	
1 st year EMBA rep.	
2 nd year EMBA rep.	

Research and Library Committee

Chair: Assoc. Dean, Research	Eileen Fischer
Secretary:	Farhana Islam
Faculty Representatives:	
	Winnie Shen
	Mark Kamstra
	Russell Belk
Elected Student Members:	
Masters Rep.	TBD
BBA/iBBA Rep.	TBD
Ex Officio Voting Members:	
Bronfman Business Librarian	Angie An
Research Officer	Farhana Islam
Ex Officio Non-Voting Members:	
Exec. Director IST	TBD

Tenure and Promotions Committee

Chair	
Secretary:	Sabine Friedrich
Core Members Continuing:	
	Moren Levesque
	Ivona Hideg
Election:	
	Charles Cho; Manus Rungtusanatham
Ph.D. Rep	TBD
Noncore Members:	
ACTG	Linda Thorne, Viswanath Trivedi, Dean Neu, Sylvia Hsu
<i>Note: Areas that have candidates going forward for T&P should identify non-core members and inform nominating committee.</i>	

Tenure and Promotions Appeals Committee

ORGS	Chris Bell,
ECON	Fred Lazar
SUST	Burkard Eberlein

Nominating Committee

Chair	Ashwin Joshi
Secretary	Nikki Jagdeosingh
Faculty Representatives:	
	Vibhuti Dhingra
	Divinus Oppong-Tawiah
Elected Non-Voting Student Members:	
GBC President	TBD
UBS President	Mohammed Dada
Ex Officio Members:	
Associate Dean Academic	Kevin Tasa

Faculty Service Roles

Scientific Director of Innovation, Design, and Consumption Lan (NOESIS)	Peter Darke
Affirmative Action Coordinator	Ashwin Joshi
YUFA Steward	Jeff Everett Markus Biehl

Senators

6 Faculty including the Dean	Kevin Tasa (July 1, 2023)
	Markus Biehl (June 2025)
	Dirk Matten (June, 2025)
	Cameron Graham (June, 2023)
	Preet Aulakh (June, 2023)
Ex Officio	Detlev Zwick
Student Senators:	
Graduate Student rep.	TBD
Undergraduate Student rep.	TBD

Senate Committees:

(* = designated Schulich slots)

Academic Policy, Planning & Research (APPRC)*	Burkard Eberlein (June 2024)
Tenure & Promotions	Jeffrey Everett, Chris Bell
Executive*	Kevin Tasa (June 2023)
Sub-Committee on Honorary Degrees*	Matthias Kipping (June 2024)
Academic Standards, Curriculum and Pedagogy (ASCP)	

Section 3: Administrative Committees and Roles

Chair of Faculty Council: Cameron Graham

Vice Chair of Faculty Council: Luke Zhu

All Committee Mandates can be found at:

<https://teachingandlearning.schulich.yorku.ca/academic-administrative-governance/>

These committees and roles in this section are constituted by decanal authority.

Executive Committee
Operating Committee
Management Committee
Faculty of Graduate Studies
Other Schulich Academic Administrative Roles
Other University Administrative Roles

Executive Committee

Chair:	Cameron Graham
Secretary	Kathryn Doyle
Ex Officio Voting Members:	
Dean	Detlev Zwick
Vice-Chair Faculty Council	Luke Zhu
Associate Dean Academic	Kevin Tasa
Associate Dean Research	Eileen Fischer
Associate Dean Students	Kiridaran Kanagaretnam
Associate Dean External Relations	Theodore Noseworthy
Associate Dean EMBA	Matthias Kipping
Executive Officer	Anwar Mustapha
Chairs of Faculty Council Standing Committees:	
Masters Admissions	Kiridaran Kanagaretnam
Research and Library	Eileen Fischer
Nominating Committee	Ashwin Joshi
Student Affairs	Avis Devine
Tenure and Promotion	Moren Lévesque
Equity and Community	Luke Zhu
BBA/iBBA Program Committee	Mike Valente
EMBA Program Committee	Kevin Tasa
PhD Program Committee	Peter Darke
Masters Programs/Programs Coordinating Committee	Kevin Tasa
Program Directors:	
BBA/iBBA	Mike Valente
MBA	Ashwin Joshi
MAcc	Viswanath Trivedi
MSCM	David Johnston
MMkg	Grant Packard
EMBA	Matthias Kipping
PhD	Peter Darke
MF	Melanie Cao
MREI	Jim Clayton
MMgt	Luke Zhu
MBAN	Julian Scott Yeomans

MMAI	Julian Scott Yeomans
GBC President	TBD
UBS President	Mohammed Dada
PhD President	TBD

Operating Committee

Chair:	Dean Detlev Zwick
Secretary	Yvonne Massop
Ex Officio Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Research	Eileen Fischer
Associate Dean Students	Kiridaran Kanagaretnam
Associate Dean External Relations	Theodore Noseworthy
Associate Dean EMBA	Matthias Kipping
Executive Officer	Anwar Mustapha
Program Directors:	
BBA/iBBA	Mike Valente
MBA	Ashwin Joshi
MREI	Jim Clayton
PhD	Peter Darke
EMBA	Matthias Kipping
Area Coordinators:	
ACTG	Linda Thorne
ECON	Irene Henriques
FINE	Pauline Shum Nolan
MKTG	David Rice
OMIS	Manus Rungtusanatham
ORGS	Ruodan Shao
SGMT	Willow Sheremata
SUST	Geoffrey Kistruck

Management Committee

Chair:	Dean Detlev Zwick
Secretary	Yvonne Massop
Ex Officio Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Research	Eileen Fischer
Associate Dean Students	Kiridaran Kanagaretnam
Associate Dean External Relations	Theodore Noseworthy
Associate Dean EMBA	Matthias Kipping
Executive Officer	Anwar Mustapha
Executive Director Student Services and International Relations	Lindsay Hillcoat
Interim Director, Computing Services	Brenn Kha
Executive Director, CDC	Hollis Sinker
Executive Director, SEEC	Rami Mayer
Executive Director, Development and Alumni Relations (DAR)	TBD

Faculty Of Graduate Studies

Ex Officio	Dean Detlev Zwick
Program Directors and Representatives:	
Associate Dean Academic	Kevin Tasa
Ph.D.	Peter Darke
EMBA	Matthias Kipping
MBA	Ashwin Joshi
MBAN	Julian Scott Yeomans
MAcc	Viswanath Trivedi
MFIN	Melanie Cao
MMKG	Grant Packard
MMgt	Luke Zhu
MMAI	Julian Scott Yeomans
MSCM	David Johnston
MREI	Jim Clayton
Diploma Directors:	
Advanced Accounting	Viswanath Trivedi
Art, Media & Entertainment Management	Kenneth Rogers

Business and the Environment	Geoffrey Kistruck
Communication, Culture & Leadership	Ashwin Joshi
Financial Engineering (Concurrent and Stand Alone)	Melanie Cao
Health Industry Management	Amin Mawani/Joe Mapa
Nonprofit Management and Leadership	Geoffrey Kistruck
Post-MBA Diploma in Advanced Management	Ashwin Joshi
Student Representatives:	
Ph.D.	TBD
EMBA	TBD
IMBA	TBD
MBA	TBD
MBAN	TBD
MAcc	TBD
MFIN	TBD
MMAI	TBD
MMGT	TBD
MMKG	TBD
MREI	TBD
MSCM	TBD
GBC President	TBD

Schulich Academic Administrators

Associate Deans:	
Associate Dean Academic	Kevin Tasa
Associate Dean Students	Kiridaran Kanagaretnam
Associate Dean Research	Eileen Fischer
Associate Dean External Relations	Theodore Noseworthy
Associate Dean EMBA	Matthias Kipping
Program Directors:	
BBA/iBBA	Mike Valente
EMBA	Matthias Kipping
MBA	Ashwin Joshi
MAcc	Viswanath Trivedi

MSCM	David Johnston
MMKG	Grant Packard
MF	Melanie Cao
MREI	Jim Clayton
MMgt	Luke Zhu
MBAN	Julian Scott Yeomans
MMAI	Julian Scott Yeomans
PhD	Peter Darke
Diploma Directors: (source: ADA Office, website to be updated)	
Advanced Accounting	Viswanath Trivedi
Art, Media & Entertainment Management	Kenneth Rogers
Business and the Environment	Geoffrey Kistruck
Communication, Culture & Leadership	Ashwin Joshi
Financial Engineering (Concurrent and Stand Alone)	Melanie Cao
Health Industry Management	Amin Mawani/Joe Mapa
Nonprofit Management and Leadership	Geoffrey Kistruck
Post-MBA Diploma in Advanced Management	Ashwin Joshi
Specialization Directors: (source: www.schulich.yorku.ca)	
Accounting	Linda Thorne
Arts, Media & Entertainment Management	Kenneth Rogers
Business & Sustainability	Geoffrey Kistruck
Business Consulting	TBD
Digital Transformation	Manus Rungtusanatham
Economics	Irene Henriques
Entrepreneurial Studies	Moren Lévesque, Chris Carder
Entrepreneurial & Family Business Studies	Moren Lévesque, Chris Carder
Finance	Pauline Shum Nolan
Financial Services	James Darroch
Global Metals and Minerals Management	Richard Ross
Global Retail Management	Markus Giesler
Health Industry Management	Joseph Mapa, Amin Mapa
International Business	Farrokh Zandi
Marketing	David Rice

Operations Management & Information Systems	Manus Rungtusanatham
Organization Studies	Ruodan Shao
Responsible Business	Geoffrey Kistruck
Strategic Management	Willow Sheremata
Certificate Directors:	
Certificate in International Management (CIM)	Bernie Wolf
Area Coordinators:	
ACTG	Linda Thorne
ECON	Irene Henriques
ENTR	Moren Lévesque, Chris Carder
FINE	Pauline Shum Nolan
MKTG	David Rice
ORGS	Ruodan Shao
OMIS	Manus Rungtusanatham
SGMT	Willow Sheremata
PROP	Jim Clayton
SUST	Geoffrey Kistruck
Other Schulich Administrative Roles:	
Director, Schulich Centre for Teaching Excellence	Tom Medcof
MGMT 6100 Coordinator	Ingo Holzinger
Director YCG	Kostas Tsambourlianos
Director Global Relations	Theodore Peridis
Centre for Customer Centricity	Ajay Sirsi
Hennick Centre, Co-Director	Peter Macdonald
Krembil Centre for Health Management and Leadership	Joseph Mapa
George Weston Ltd. Centre for Sustainable Supply Chains	David Johnston
Other University Administrative Roles:	
York University Pension Plan	Pauline Shum Nolan
Executive Director, York Change	Ellen Auster

**SCHULICH SCHOOL OF BUSINESS
EXECUTIVE COMMITTEE &
FACULTY COUNCIL**

The following meeting dates are proposed for Executive Committee and Faculty Council in the 2022-2023 year. All meetings will begin at 11:30am, unless otherwise noted.

Executive Committee	Faculty Council
Friday, September 16, 2022	Friday, September 30, 2022
Friday, October 14, 2022	Friday, November 4, 2022
Friday, November 25, 2022	Friday, December 9, 2022 (10:30am start)
Friday, January 20, 2023	Friday, February 3, 2023
Friday, February 24, 2023	Friday, March 10, 2023
Friday, April 14, 2023	Friday, April 28, 2023
Friday, May 19, 2023	Friday, June 2, 2023

Memorandum

To: Faculty Council
From: Mike Valente, BBA/iBBA Program Committee
Date: April 29, 2022
Subject: Committee Year-End Report for 2021-2022

Program Committee Initiatives

- Program strategy subcommittee developed draft program objectives and program outcomes and finalized strategic pillars.
- Explored relationships with York level faculty including ADMS and Languages and Linguistics departments.
- Undertook analysis of student interest in specializations over the last 5 years and presented to committee.
- Canvassed areas for electives that could be open to non-Schulich York students.
- Update of OMIS specializations (retirement of existing and approval of new ones). Summarized below.
- Met with UBS executive team monthly.
- Met with core course coordinators to discuss challenges and opportunities associated with pandemic pivots.
- Review new course proposals as well as change proposals for existing courses (see below for summary).
- Began program cyclical review.
- Participated in EQUIS process as representative for the UG program
- Updated to the BBA/iBBA Committee Mandate to include one faculty voting member from each functional area, added the Chair of the CEC as ex-officio voting member and the Director Academic Affairs as a non-voting member and amended the title of the Student Services representative.

Curriculum Changes

- BSUS 4400 (integration, rubric)
- BSUS 4900 3.0 (rubric, course title)
- BSUS 4901 3.0 (rubric, course title)
- ECON 4220 3.0 (retired)

- ENTR 3400 3.0 (course format)
- ENTR 3600 3.0 (course format)
- IBUS 3100 3.0 (course title)
- IBUS 4100 3.0 (change to number of workplace hours)
- INTL 3021 3.0 (course title)
- MGMT 2060 3.0 (enrolment cap change)
- MGMT 4850 3.0 (change to number of workplace hours)
- OMIS 3020 3.0 (calendar description)
- OMIS 3670 3.0 (pre-requisite)
- OMIS 3710 3.0 (calendar description)
- OMIS 3730 3.0 (pre-requisite, calendar description)
- OMIS 4000 3.0 (calendar description)
- OMIS 4010 3.0 (pre-requisite, calendar description)
- OMIS 4300 3.0 (retired)
- MGMT 4700 3.0 (rubric, course number, calendar description, learning outcomes)

New Course Proposals

- ECON 4050 3.0
- OMIS 4530 3.0

Specialization Retired

Operations Management and Information Systems

New Specializations Approved

Business Analytics

Operations and Supply Chain Management

Memorandum

To: Faculty Council
From: Marcia Annisette, Chair Master Programs Committee
Date: April 22nd, 2022
Subject: Year-End Report for 2021-2022, Master Programs Committee

Program-Specific Initiatives

MBA

- Various course changes, new course approvals and course retirements
- Discussion of Learning Outcomes for the MBA Program
- Launched consultations around revising the MBA curriculum
- Launched the Weekend-Evening Stream in the MBA Program
- Developed a proposal to launch a new MBA Program that is focused on Leading Technology Enabled Organizations (MBAt)

MBA/JD

- Obtained Faculty Council approval at Schulich and Osgoode to waive GMAT requirement for MBA/JD applicants enrolled in JD Program at Osgoode
- Increased recruitment efforts through targeted delivery of applicant information sessions at Osgoode and otherwise
- Experienced significant increase in MBA/JD applications received as of March 2022
- Commenced internal discussions regarding possible Program enhancements designed to attract external gift funding
- Maintained high-quality delivery of MBA/JD seminars at Schulich and Osgoode
- Managed ongoing Student Association initiatives regarding annual MBA/JD Conference, alumni relations and career development opportunities

IMBA

- Retirement of the IMBA Program
 - Ongoing support for the final graduating IMBA cohort
 - Completion of all internship reports & 602 courses
 - Completion of IMBA web page to be launched after June 1 2022
- IMBA virtual alumni initiatives
- IMBA virtual grad celebration

MACC

- Finally, successfully completed the three-year accreditation review and secured the accreditation extension from CPA Ontario.
- Obtained permission to offer DIAC Term 0 in India from Summer 2023. Started recruitment and marketing efforts to attract students to the program.

- Proposal to extend the GMAT/GRE exam waiver (currently available to Schulich students) to non-Schulich students from other Canadian Universities.
- Held a workshop on data analytics and information systems (DAIS) for incoming Term 2 students in the summer hosted by the CPA DAIS team.
- Continuation of the process to integrate Data Analytics and Information Systems concepts through individual courses in the MAcc/DIAc programs.
- Continued maintenance and quality improvement of the program by aligning course materials to the competency map and CFE examination trends.
- Pass rates for the DIAc program are low consistent with prior years (60%); however, for this year we are planning on some additional case workshops and activities to better-assist students with their CFE training. Pass rates for our BBA / iBBA students continue to be high (90% for 2021) as compared to the provincial averages (low 70s).

MBAN/MMAI

- In 2021/22 the focus for improvement for both programs was on continuous improvement of both the curriculum and the means by which the curriculum is delivered. These changes were necessary to keep up with the rapidly changing world of advanced analytics and for effective administration. Both programs are somewhat conjoined in their management in that they share courses, instructors and pedagogical strategies. This year we made progress on delineating what courses should be in common to both programs and which should be unique to differentiate each program. These changes are pending faculty approval later this year and into 2023. During 2021/22 the director in consultation with Schulich leadership and the OMIS area have been working on securing stable administrative oversight, clerical support and instructional resources to maintain the efficient delivery of both programs. This includes the designation of part time associate directors for each program. Included in those measures is the on boarding of a new director for both programs for July 1 2022. I will briefly refer to specific changes for each program, then changes in common focused primarily on the delivery of the experiential capstone projects and student success initiatives.
- **MBAN Specific Changes.** Numerous minor changes were made to the order, selection and description of required and elective courses. These increased the “managerial” content overall of the program as well as better communicated to students what they would be learning about business and analytics. These were passed by Faculty Council in Fall 2021.
- **MMAI Specific Changes.** Similar to the MBAN, changes were planned in the order, selection and description of required courses. These have been approved by the Operations Management and Information Systems (OMIS) area group. Included in these changes are plans to move the program from a Fall start to a Spring start similar to the MBAN in order to facilitate the management and growth of the program.
- **Analytic Consulting Projects (ACP) and Artificial Intelligence Consulting (AICP).** Both program’s capstone student project courses have been overhauled to make them more focused on improving the learning outcomes for students and more efficiently managing the relationship between client organization, the school and the programs. This has included more systematic sourcing of client organizations and specific projects, getting students to plan better their projects, communication skills for students and greater definition of the process of coaching by the instructor team. In addition, we have clarified the focus on student learning outcomes in the pedagogy and the terms of reference with client organizations in documents such as contracts. Observation of the first cohort under this regime suggests that the initiatives are having a positive impact. Refining this signature feature for both programs will continue to be a work-in-progress.
- **Student Success.** Over the year CMP staff allocated to both programs were involved in supporting activities such as career coaching, industry outreach for ACP and AICP clients and guest speakers from industry. Going forward this support will need to be supplied by Schulich functions such as the Career Development Centre (CDC) and Alumni Affairs as both CMP positions will be vacant. Both the MMAI and MBAN programs are at early stages of defining these relationships and the division of labour. The good news is that in both programs, students are being hired by quality employers while in the program or very soon after graduation.

- In partnership with CFA Institute, an information session was held on April 1, 2021 for MFIN students and faculty Boost Your Career with CFA Program.
- Held four virtual High Impact Communication Workshop Series in the Summer 2021 term for all MFIN students.
- Participated in Schulich's Mix and Mingle event held on July 28, 2021.
- Participated in Schulich's MF Program Director Welcome event held on August 25, 2021.
- Hosted MF Program Welcome Mixer held on September 9, 2021.
- Granted renewal of the CFA Institute Program Partnership.
- Granted renewal of the GARP FRM Academic Program Partnership.
- Participating in the CFA Research Challenge. The Research team (Gregory Pau – Faculty Advisor – Team Leader, Aditya Bendale, Vyshnavi Nair, Abdullah Sahli, Weihao Zhao, Xinxin Zhang).
- Participating in the Ethics Challenge case competition organized by the Toronto Chapter of the CFA Society. The Ethics team (Gregory Pau – Faculty Advisor, Juhi Maru – Team Leader, Rishika Bhatia, Yusuf Jiruwala, Kaustubh Sharma, Anbochao Wang) .CONGRATULATIONS! CELEBRATING the MF TEAM who WON the 2022 CFA TORONTO ETHICS CHALLENGE!!!
- Participated in the ETF Global Challenge Portfolio (Arnav Arora, Jasper Hsu, Kaustubh Sharma, Wanli Zhao, Zhangcao Zhou).
- Ranked and selected 6 MF and 6 MBA students to receive the CFA scholarships.
- Ranked and selected 6 MF students to receive the FRM scholarships.
- Hosted a virtual Global Association of Risk Professionals (GARP) event on October 18, 2021, with all MFIN students taking part.
- Participated in the University Trading Challenge organized by the CME Group. The Trading Team - The Bay Street Bulls (Melanie Cao – Faculty Advisor, Yash Krishna – Team Leader, Jasper Hsu, Liyan Luo, Zongyuan Zhai, Arnav Arora) placed 26th/386th overall with a final portfolio value of \$704942 and change, representing a 41% overall return for the month.
- Hosted the Master of Finance Graduation Mix and Mingle for graduate students on November 2, 2021.
- Participated in the 2022 AIMA Canada Alternative Investment University Case Competition the first time and won the second place in the competition. The MF Team (Melanie Cao – faculty advisor, Yash Krishna – Team Leader, Jasper Hsu, Yahan Jiang, Sukaran Kalra, Anbochao Wang).
- Sponsoring and participated in the Exchange Traded Funds Roundtable, organized by the Canadian ETF Association, with all MFIN students taking part (virtual event) on January 19, 2022.
- MF Program held a virtual Return to In-person Learning information session for MF students on February 2, 2022.

MMGT

- Added a new course (Startup Marketing) to the ENTR stream
- Received student outcome data from the 2020 cohort showing starting salaries (e.g., average = \$62k, and percentage of jobs found 6 months after graduation: 86%)
- Began the process to improve outreach to domestic applicants in order to increase domestic student numbers
- Revised the core course Business Communication and Team Dynamics to include new content on Professional Development, especially matters relating to job search and self-awareness.

MMKG

- Course Changes for MKTG 6570
 - From MMKG core to elective course
 - New learning outcomes and course description
- Hosted first exclusive in-person alumni networking event of MMKG Program
- Initiated bi-weekly rotating student “braintrust” focus groups
- Major Program Changes Planning (targeted for 2024/25 program year)
 - Preliminary thinking shared with MPC
 - Situation assessment and draft changes
 - Tentative changes: admissions standards, summer term start / winter term end, two 3 credit core courses removed, two 1.5 credit professional development courses added, updated experiential education strategy)

- Concept testing / refinement via stakeholders in progress
- Increased Experiential Education support (part-time Associate Program Director)
 - Graduate Work Placement Initiative targeting 100% increase in placements YOY
 - EE / career development strategy as part of 2024/25 major program change

MSCM

- In 2021/22 the focus was on continuous improvement of both the curriculum and student success activities. The three major changes this year were as follows:
- **Reallocate Curriculum To Emphasise Digitalization And Analytic Learning Objectives.** In support of this objective the following changes were approved by faculty council in September 2021 and implemented Winter term 2022.
 - Reduce the length and associated GPA weighting of OMIS 6300 Managing Change in Supply Chains, from 12 to 6 weeks in length and credit value from 3.00 to 1.50
 - Increase the length and associated GPA weighting of OMIS 6320 Managing New Supply Chain Technology, from 6 weeks to 12 weeks in length and credit value from 1.50 to 3.00.
- **Hiring of a Full time MSCM Industry Advisor.** In partnership with the Career development Centre (CDC) a new part time industry advisor was hired to provide expertise in supply chain management to aid in coaching of MSCM students for success in finding employment in the supply chain profession.
- **Industry Student Events For Industry Knowledge and Networking.** Two educational events were held in house for MSCM students in the areas of transportation and logistics (October 2021) and supply chain analytics (March 2022). These were panels of industry practitioners which allowed for sharing of best practice and career advice. This is in addition to access to Supply Chain Canada professional conferences on supply chain digital transformation, sustainability and women in supply chain management sponsored by the George Weston Ltd. Centre for Sustainable Supply Chains. In April 2022 the program and the Weston Centre in partnership with the CDC will have its first “Supply Chain Career Networking Expo” which will bring employers together with employers to facilitate placement. This is an extension of earlier efforts done in-house on resume preparation and interview skills (October 2021).

Memorandum

To: Faculty Council
From: Ashwin Joshi, Chair, Nominating Committee
Date: May 4, 2022
Subject: Committee Year-End Report for 2021 - 2022

The Nominating Committee brought forth for approval a slate of names to serve on the various committees of the Faculty Council and Senate. The slates were presented in a timely manner to ensure a smooth succession. The Committee also made adjustments as needed to comply with any changes with the Faculty's various committees during the year.

Memorandum

To: Faculty Council
From: Giri Kanagaretnam
Date: May 6th, 2022
Subject: Masters Admissions Committee Year-End Report for 2021-2022

The mandate of the Masters Admissions Committee is to review files of applicants to Masters Programs (except for EMBA applicants) who do not meet standard Schulich admission requirements and to decide whether to admit, admit on probation, or reject the applications. As of May 6th 2022, the Committee deliberated on 22 applicants for the MBA program, with all deliberations occurring through online vote. All decisions were made within a one-week time frame.

Memorandum

To: Faculty Council
From: Moren Lévesque
Date: 4 May 2022
Subject: SSB Tenure & Promotion Committee Year-End Report for 2021-2022

The T&P Committee has so far reviewed one promotion to Professor files, and one promotion to tenure for someone who already was an Associate Professor.

The T&P Committees developed the SSB Criteria for Tenure & Promotion to Associate Professor under the Teaching Stream. SSB Faculty Council approved the document in October 2021. It was then submitted to the Senate Committee on Tenure and Promotion Committee in October 2021. However, we are still waiting for a response, even after inquiring about its status in February 2022, at which time we were told that it is coming our way.

The T&P Committee will be meeting the Chair of the Senate Committee on Tenure and Promotion to discuss delays not only with files, but also with the reactions regarding the SSB Criteria for Tenure & Promotion to Associate Professor under the Teaching Stream that were submitted to that committee back in October 2021.

For the remaining of the year, the T&P Committee will continue reviewing incoming files for tenure and promotion, as these are presented to the Committee. In addition, the T&P Committee will evaluate and respond to guidelines and/or queries that may arise from the Senate T&P Committee.

Memorandum

To: Faculty Council
From: Luke Zhu, Committee for Equity and Community
Date: May 4, 2022
Subject: Committee Year-End Report for 2021 - 2022

The Committee for Equity and Community has embarked on the following initiatives during the 2021-2022 academic year.

1. Added a CEC representative on the Master's and BBA/iBBA program committees to review new course and program proposals for DEI initiatives and decolonization.
2. The committee reviewed and developed an EDI and decolonization question that will be added to the New Course Proposal Form.
3. The committee also worked with York's Teaching and Learning Commons to develop a supplementary document that seeks to help instructors to more effectively embed EDI into the proposed courses.
4. The committee worked on developing new EDI-related questions for ONCE course evaluation form. The new questions were submitted to the Program Coordinating Committee (PCC) for consideration. CEC is now working on addressing the issues and concerns raised by members of PCC.
5. Facilitate Indigenizing and decolonizing of courses and academic programs: The committee has had discussions about the ways to indigenize and decolonize courses and academic programs. Given the scope of this initiative, the committee has decided to recruit an expert with expertise in indigenizing and decolonizing academic programs in business school setting to assist with this initiative. The committee is currently working on securing funding for recruiting external talent on this initiative.
6. In collaboration with the Office of Strategic Initiatives, CEC co-hosted Dean's Retreat on EDI Strategies on March 29 to provide greater awareness of DEI challenges, issues, and initiatives within the school.
7. In addition to the retreat, the committee has also sought to increase its presence by creating a website that is dedicated to featuring the work of the committee. The committee is expected to launch the website in late May.



Memorandum

To: Faculty Council
From: PhD Program Committee

Date:

Subject: Committee Year-End Report for 2021-2022

The members of this year's committee included:

PhD Program Committee Chair: Eileen Fischer,
Jeffery Everett, Yuval Deutsch, Manus (Johnny) Rungtusanatham, Yisong Tian, Ela Veresiu,
Maxim Voronov, Kiridaran Kanagaretnam, Marcia Annisette, Luba Pan, Jennifer Sedgewick

Over the course of this academic year, the committee has

1. Overseen the process of selecting new students to admit to the program
2. Adjudicated scholarship admission awards
3. Continued the process of updating area PhD course requirements, including putting official changes through Faculty Council
4. Begun the process of adding a new SUST PhD area, for a new total of 7 PhD areas
5. Collaborated with FGS in updates to Thesis and Dissertation Regulations
6. Processed SSHRC applications
7. Processed OGS applications
8. Adjudicated doctoral dissertation award nominees
9. Worked with SSIR in the preparation of webinars
10. Continued to update the Ph.D. website

FACULTY COUNCIL SCHULICH SCHOOL OF BUSINESS MINUTES OF MEETING

A regular meeting of the Schulich Faculty Council for the 2021-2022 academic year was held on
Friday April 22, 2022 at 11:30pm via Zoom.

In Attendance:

Chair: C. Graham

Interim Secretary: K. Doyle

Assistant: L. Da Silva

Voting Members of Faculty Council Present:

Senior Admin	D. Zwick, M. Annisette, K. Kanagaretnam, D. Matten, T. Noseworthy		
ACTG	A. Mawani, G. Saxton, L. Thorne, V. Trivedi		
ARTM	T. McQueen, K. Rogers		
ECON	A. Coutts, I. Henriques, B. Wolf (ret.)		
ENTR			
FINE	M. Cao, P. Foroughi, M. Kamstra, L. Ng, A. Rzeznik		
MKTG	A. Campbell, E. Fischer, M. Giesler, A. Joshi, E. Veresiu		
ORGS	C. Bell, I. Hideg, B. Lyons, W. Shen, K. Tasa		
OMIS	A. Diamant, M. Levesque, J. Rungtusanatham, D. Oppong-Tawiah		
PLCY	M. Kipping, A. Madhok, M. Majzoubi, C. McMillan, T. Peridis, W. Sheremata, S. Weiss		
PROP	A. Devine, J. McKellar (ret.)		
SUST	G. Kistruck, M. Valente	OTHER:	X. Li (Lib)
Voting CPM's & Director of 601	A. Mustapha, L. Hillcoat		
Student Reps	A. Kakkar (UBS), J. Lam (PhD), T. Rashid (GBC)		

Voting Members of Faculty Council Absent/Regrets:

T. Anand (UBS)	P. Darke	S. Hsu	R. McClean (ret.)	M. Rice
P. Aulakh	A. DeCarufel (ret.)	R. Imanirad	N. Mead	H. Rosin (Ret.)
E. Auster	Y. Deutsch	R. Irving (ret.)	M. Milevsky	P. Sadorsky
K.-H. Bae	V. Dhingra	D. Johnston	G. Morgan (ret.)	P. Shum Nolan
M. Bamber	D. Dimick (ret.)	R. Karambayya (ret.)	N. Nasser (UBS)	J. Tan
T. Beechy (ret.)	M. Dong	A. Kecskes	D. Neu	Y. Tian
R. Belk	B. Eberlein	H. Kim	C. Oliver (ret.)	M. Voronov
A. Bhanich-Supapol	J. Everett	M. Kristal	G. Packard	E. Westney (ret.)
I. Bicer	M. Farjoun	Y. Larkin	Y. Pan	L. Wright (ret.)
C. Cho	B. Gainer (ret.)	F. Lazar	J. Patel (UBS)	S. Yeomans
J. Chung	B. Graham (alum)	G. Li	R. Phillips	J. Zemans (ret.)
J. Clayton	I. Holzinger	Z. Li	E. Prisman	H. Zhu (GBC)
W. Cook (ret.)	D. Horváth	I. Macdonald (ret.)	S. Qu	L. Zhu (Co-Chair)

Leaves and Sabbaticals:

M. Biehl	J. Darroch	R. Shao	A. Sirsi	T. Wesson
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Non-Voting Members of Faculty Council Present

A. Asif (guest)	A. Gaukel (guest)	M. Machado	H. Sinker	D. Woticky
M. Bhutani	L. Ginsberg	N. Machado (guest)	N. Sutherland	F. Zandi
C. Carder	A. Gravel	K. Mapa	S. Tenn	
W. Craddock	B. Kha	C. Mueller (guest)	T. Tolias	
P. Deonandan	L. Lakats	C. Niederwanger	S. Whitaker (guest)	
A. Ferreira	L. Pan	J. Pinto	K. Welsby	

Non-Voting Members of Faculty Council Absent:

W. Al-Hussaini	D. Elsner	G. Klar	M. Morriello	E. Roman
P. Barter	E. Farrell	A. Konson	R. Moy	R. Ross
D. Barret	J. Fayt	H. Koren-Cohen	A. Narbe	C. Sicoli
S. Calahan	A. Fisher	D. Lennox	Z. Necas	S. Sigel
E. Caprioni	S. Friedman	R. Lynn		T. Stubbs
M. Cernea	T. Gosse	P. Macdonald	M. Orlan	C. Sullivan
J-M. Clark	P. Grant	D. Mak	C. Partland	A. Thomson
T. D'Agostino	A. Harris	Y. Massop	B. Pasquali	E. Vanderheyden
L. De Wilde	M. Hastings	T. Medcof	G. Pau	N. Verma
G. Deans	R. Hines	R. Mayer	P. Pivato	A. Welsh
P. Dillon	L. Jackson	G. Milavsky	J. Pokrajac	C. Zhuang
K. Ellis	J. Jeyakumaran	J. Morgan	S. Pulver	

1. Welcome and Chair's Remarks

Chair calls the meeting to order at 11:31 am.

Land Acknowledgement.

Remarks on announcement of new Chair of Senate. Contextualizes the OMIS proposals on the agenda. The proposal for the specialization is one of two specializations that will be proposed to replace the retired one.

Summarizes some of the survey responses for Faculty Council meeting mode in 2022-23. At the last Executive Committee meeting, the conversation focused on using a variety of modes to accomplish different aims and to plan a couple of meetings that promote in-person attendance with catering and an opportunity to socialize.

2. Presentation of Draft Equity, Diversity, and Inclusion Strategy

Amy Gaukel presents on behalf of the President's Advisory Council on Equity, Diversity, and Inclusion. The Council conducted two environmental scans to assess what structures, processes, and policies exist within the institution related to equity, diversity, and inclusion.

A. Gaukel describes the background and composition of the Council; method and approaches to its research and strategy development; plans for consultation and collecting feedback. Describes the current survey and reminds Council members to respond to the survey if they have not already.

The principles highlighted by the strategy are: human rights, intersectionality, indigeneity, equity, inclusion, accessibility, social justice, anti-racism.

C. Graham asks about how the strategy proposes to deal with conflict. A. Gaukel references related resources- namely the institution's guide on open and respectful dialogue, training sessions for faculty and staff. There is awareness that there may be conflict regarding the strategy and the Advisory Council is committed to supporting community members work through it as it arises.

3. Dean's Remarks

(Item moved to accommodate timing of the guest presentations)

Question from M. Kamstra related to remarks about returning to in-person teaching. Some courses work well online—especially when there are accommodation and inclusion issues. How much flexibility does the School have to do more than a couple of classes per course virtual or online?

M. Annisette responds that the University uses online in a very specific sense to mean virtual and asynchronous. Remote as a mode is no longer available within the University because it was an emergency mode established to accommodate at the start of the pandemic.

D. Zwick responds that some flexibility already exists for instructors based on preferences and pedagogical rationale. Flexibility is provided by the Senate Executive to use remote up to a certain limit (30%) does not need approval. If one wants to redesign their course to be fully online, blended, etc. that has to go through a collegial approval process. The threshold is whether there is an adequate case that the course achieves its learning outcomes based on the proposed mode(s). Courses can benefit from those new technologies and delivery modes; in these cases, students will be appreciative, but the collegial governance process has to be followed.

Members discuss the details of when courses need to go through governance for approval to change the delivery mode.

M. Annisette provides clarification on the difference between the fifteen percent remote and the thirty percent threshold for governance. The fifteen percent was to be flexible during the return to campus. If an in-person course is to be changed to offer thirty percent or more in another mode, that will trigger the need to go through governance for approval.

4. Vaughan Healthcare Precinct and School of Medicine Discussion

Vice President, Research and Innovation, Amir Asif and Sarah Whittaker present on this item. They explain that the purpose of the item is to engage all faculties in discussion to get input on the project. VHCP is a collaboration between 4 partners: City of Vaughan, McKenzie Health, Venture Lab, and York University. The initial facility is planned as a flexible space that can accommodate health research and education programs, including the school of medicine, space for labs, community clinics, innovation and entrepreneurship initiatives related to health care.

APPRC is also engaged in an ongoing conversation about this initiative. Consultation plan is extensive- in terms of community organization, universities, hospitals, healthcare organizations.

The Chair informs the guest presenters that the new program proposal for the Master in Health Industry Administration is being considered by Council today.

A. Asif adds an icebreaker question in the Zoom chat: what kinds of collaborative centers or institutes are envisioned for a potential School of Medicine by the Schulich School of Business?

A.Mawani: what MHIA offers is a skillset to professionals to do cost-benefit analysis of different healthcare approaches. A. Mawani agrees to A. Asif's request to further engage him for input.

C. Graham asks a question about funding. York is a university of strong professional faculties. Some of the things that come up in conversation with deans of the professional faculties- for the same amount of time to spend on CIHR, researchers can often get a few million dollars of private funding. Operation grants are used as a starting block to identify other research income and funding relevant to the university. The institutional envelope we get on certain grants is also dependent on the operating grant; it's the same with Tri-Council grant allocation. York has strength in interdisciplinary research- there is an opportunity for all faculties to contribute.

T. Peridis comments on resources. There is a sense that eventually York will have a faculty of medicine. Already committed to Markham Campus. Related to the YUFA communique, how does this initiative dovetail with the other institutional strategic priorities and investments? A. Asif responds to assure Council members that York's financial future is stable. There is no comparison between Laurentian and York. To establish a school of medicine will require a lot of resources. There will be a lot of work with Advancement to raise funds for the building. The operating budget would come from province in form of funding available to students for study. Lassonde provides a good parallel example- over the years, LSE has fully paid back the advancement by the province for its start-up. The University is also in conversation with the federal government about funding. The establishment of the medical school will not affect sustainability of 11 existing faculties at York.

S.L. Tenn comments that there is a possibility of establishing a dual degree in MD/MBA. There is also an opportunity to consider an EMBA program with focus on healthcare. Rotman has global EMBA in healthcare and life sciences. In past, EMBA has hosted doctors, nurses, pharmaceutical professionals.

A.Diamant: What is it that the precinct wants to be known for? Trained researchers here can help with how to share large data sets appropriately. The initiative needs to be fostered and

discussed more to gain understanding of relationship between healthcare research, AI, informatics.

A. Kakkar offers a response from a student point of view. There is an existing club that focuses on the healthcare industry so that could be another source of collaboration. Another possible collaboration is the Lassonde Start-Up Initiative that takes students abroad and accepts a few Schulich students; a program like that from the School of Medicine could benefit students as well perhaps those interested in global health.

D. Zwick comments that the School does have a more individualized funding model. Significant research funding at the individual level rather than at the level of ADR level. Because of this dynamic, it would be helpful to receive grant funding with funds that flow back through the faculty to build up the ADR office. The School could then take over some of the heavy lifting associated with research office functions such as securing funds and grant writing support. Some money needs to float back to shore up services available through the ADR office.

A. Asif reminds Council attendees that more input can be submitted by emailing vpri@yorku.ca.

5. Creation of New Master in Health Industry Administration Program (MHIA)

A. Mawani moves for Council to accept the new MHIA proposal. Seconded by J. Rungtusanatham.

Slide deck is presented providing an overview of the proposed program- a twelve-month Master's degree.

T. Peridis comments that MHIA is a three semester, full time program with weekend components. Last month, Council also saw a new program proposal for a low number of credits. Is this a trend? Should we be discussing this?

M. Annisette responds that FGS has been saying that Schulich's graduate programs are too high in credits. 12 credits with thesis, 18 credits with research paper, or 24 credits of course work. The York standard is one of three options: 12 credits with thesis, 18 credits with research paper, or 24 credits of course work. The template from first Schulich Master program had 45 credits. Research done by A. Joshi shows that this is a consistent trend that SSB programs are higher in credits.

M. Cernea would have liked to see the for-credit course as an internship to get students without work experience opportunities to secure full-time roles. A professional development course to curate content would be preferred to weekend workshops. This would be on the side of increasing the number of credits to benefit young students who do not have a lot of work experience. Open to continuing conversation outside of FC.

A. Mawani comments that it is hard to disagree with those suggestions. These are initiatives that can be developed as we go forward toward launch and afterwards. Reasonable equity between p/t and f/t students is a priority- the proponents wanted to keep the required credits flexible. Will need to see what the market is and how it drives demand/needs in the program.

D. Matten: one thing to pay attention to is the need to question the notion of healthcare- what are its parameters now?

Chair calls the question. Motion is approved unanimously.

6. Change of Mode of Delivery for ENTR 3400 3.00 and ENTR 3600 3.00

C. Carder moves that Council accept the mode of delivery change proposals for ENTR 3400 3.00 and ENTR 3600 3.00 for a trial period of two years, ending in 2024. Motion seconded by E. Fisher.

The proposals package contains the revised rationale. The courses are now proposed to be blended 50:50.

There is a point of clarification that the proposals are for the courses to be fifty percent virtual synchronous, where the proponent is using the word online. Online by the University's standards refers to asynchronous.

Chair calls the question. Motion passes unanimously.

7. PhD/GBC/UBS Updates

J. Lam provides updates on behalf of PhD students. PhDs are finishing up courses or are done. Extends thanks to faculty who have been flexible with extensions. Some are preparing for spring/summer conferences. Applicants have accepted offers to start the program in the fall.

T. Rashid provides GBC updates: most grad students are moving through final exams. Second years are trying to complete 601 and 602 projects. Graduating students are looking for jobs if they have not found them already- any leads are appreciated. Tomorrow, GBC is hosting the spring Gala. Announces the names of new executives elected.

A.Kakkar provides UPC updates. Students are finishing exams. Most people are done except for the CPAs. A few Covid cases have slowed some people. Hosting the formal at the end of next week. Election of new executives is complete and waiting for hiring to be completed before announcements will be made.

8. Adjournment

The Chair thanked members for their participation. Motion to adjourn by A.Joshi, seconder: T. Peridis.

The meeting adjourned at 1:15 pm.

**Executive Committee
Schulich School of Business**

Meeting Minutes

A regular meeting of the Executive Committee of Schulich Faculty Council for the 2021-2022 academic year was held via Zoom on Friday, April 8, 2022 from 11:30am – 1:00pm.

In Attendance:

Chair: C. Graham
Vice-Chair: L. Zhu
Secretary: K. Doyle
Assistant: L. Da Silva

Members of Executive Committee Present:

A. Campbell (Director, IMBA)	D. Matten (Associate Dean Research; Chair, Research & Library Committee)
M. Cao (Director, MF)	T. Noseworthy (Associate Dean External Relations)
J. Clayton (Director, MREI)	G. Packard (Director, MMKG)
E. Fischer (Director, PhD Program; Chair, PhD Committee)	T. Rashid (President, GBC)
D. Johnston (Director, MSCM; Interim Director MBAN and MMAI)	J. Sedgewick (President, PhD)
A. Joshi (Director, MBA; Chair, Nominating Committee)	K. Tasa (Director, MMgt)
A. Kakkar (President, UBS)	V. Trivedi (Director, MAcc)
M. Kipping (Director, EMBA)	M. Valente (Director, BBA/iBBA; Chair, BBA/iBBA Committee)
M. Levesque (Chair, Tenure & Promotions Committee)	S. Weiss (Chair, Student Affairs Committee)

Members of Executive Committee Absent/Regrets:

M. Annisette (Associate Dean Academic; Chair, Master Programs Committee & Programs Coordinating Committee)	A. Mustapha (Executive Officer)
K. Kanagaretnam (Associate Dean Students; Chair, Masters Admissions Committee)	D. Rice (Interim rep, MMKG)
B. Lyons (Chair, Community and Equity Committee)	D. Zwick (Dean)
M. Micucci (Vice-President, UBS Proxy)	

1. Welcome & Chair's Remarks

The Chair called the meeting to order at 11:32am and briefly reviewed the agenda.

2. Agenda for Upcoming Faculty Council Meeting

C. Graham provides an overview of draft Council agenda for April 22 meeting.

The Provost and Vice-President, Research and Innovation, Amir Asif have requested to attend Council in April to give a brief presentation on the Vaughan Healthcare Precinct and Medical School initiatives to solicit feedback.

C. Graham will ask C. Carder to speak to the ENTR mode of delivery change proposals at the Council meeting. The proposals will be moved from the consent agenda to the regular agenda to facilitate consideration of the implications of the proposed changes because of the size and popularity of the courses.

M. Valente comments that the emergence of course change proposals to shift in-person to blended has created the need for ongoing conversation within the committees and suggests that the topic of mode of delivery changes be added as an item to the upcoming PCC agenda so that the committees have more clear criteria or guidance for how to evaluate these proposals.

M. Levesque speaks to the need to open more sections of the most popular courses that are being requested for alternate delivery modes. Blended accommodates the constraints with instructor availability to attend campus. The choice is between changing delivery modes or having subsequent sections be taught by someone the School hires to meet demand.

E. Fischer suggests a committee of the whole discussion to deliberate further on this issue. There is a procedural issue with having the course proposal moved from the consent agenda to the Council agenda for discussion if there is no intention for this one specific instance to guide a policy change around mode of delivery proposals.

M. Levesque suggests the course could be offered as blended as a pilot for a limited term, one or two years. M. Valente asks whether the mode change improves the delivery on the learning outcomes or the student experience. D. Johnston explains that program directors must consider how to retain their best instructors and prevent them from burning out while also considering the effect of the mode of delivery on the curriculum and pedagogy of the course.

2a. Adding Presentation of the University's Draft EDI Strategy to April 22 Faculty Council

L. Zhu details the request to provide report to Senate Executive Sub-committee on Equity detailing changes to Council rules and procedures to integrate language and principles of equity, diversity, and, inclusion into Faculty-level governance. The President's Advisory Council has also requested to present the University's draft EDI strategy for feedback and to encourage people to complete the feedback survey. C. Graham requests feedback from Schulich's Executive Committee about whether members are open to scheduling both at April 22 Council. No opposition expressed.

The University Secretariat confirmed following the meeting that the Chair of the Sub-committee on Equity was writing to offer to attend Faculty Councils in faculties and schools where further facilitation or guidance is needed to move forward with integrating EDI into the governance structures. Because Schulich has proceeded with the establishment of the Community and Equity Committee and related initiatives, the Sub-committee Chair was not scheduled to attend April's meeting of Faculty Council.

3. Faculty Council Meeting Mode(s) for 2022-23

C. Graham leads a discussion of the poll results of members regarding possible meeting modes of Faculty Council in 2022-23: in-person, virtual, hyflex, or a combination. The results indicate respondents appreciate the collegiality and community of in-person, on the one hand, and the efficiency and accessibility of virtual, on the other hand. There seems to be ambivalence about hyflex. Ultimately, there will need to be some combination of meeting modes to honour the School's commitment to equity, diversity, and inclusion.

S. Weiss raised the issue that quality of the decision-making needs to be considered, as well. The virtual option can be challenging to engagement. Results are consistent with what people know about challenges and benefits of each mode from remote delivery of courses.

C. Graham comments that there is also the issue of how staff are expected to participate if Council is in-person on Friday but they are expected to work remotely on those days. Chair invites committee members to read through text responses in question 6. The Chair and Vice Chair are responsible for ensuring that people who join remotely are included. There may be ways to incentivize in-person attendance such as providing a light lunch a couple of times per year.

Members discuss the possibility of defining more deliberately what each meeting will look like to facilitate more open space discussions at some of the meetings.

A. Joshi asks about the University's position, if any, on this question. C. Graham responds that Senate continues to meet online. Attendance remains high because of it.

J. Clayton suggests that the social/open discussion/catered meetings are the kick-off meeting at the beginning of each term. Creating the conditions for people to socialize in person after the meeting would be welcome.

S. Trivedi asks how the resurgence of COVID cases potentially affects a decision on this issue for 2022-23.

T. Rashid comments that some people are still hesitant to come to campus. Even when the mask mandate ends, there will still be a segment of people who are not comfortable being near others. Having a hyflex or online component alongside the in-person meetings would be a solution, but it may inadvertently highlight people who are participating but not attending in person. Every possible decision has a consequence.

C. Graham notes that he will speak with the Dean about putting this topic on the agenda of the upcoming faculty retreat. E. Fischer suggests that the risk of putting this on the agenda for the retreat is that the whole retreat could be spent discussing the implications of this decision either way. All members can do is indicate a provisional decision because we know we are not post-pandemic yet. The direction should be to experiment and learn. A. Campbell comments that it is premature to have policy decisions now because of how easily COVID will spread at the end of the mask mandate and the relaxing of restrictions. Collectively, we need to think about the priorities and objectives of the in-person meetings. A. Kakkar reports that waves of people are already unable to meet or come to campus because of COVID infections.

4. Adjournment

The meeting adjourned at 12:19 pm.

The following item was approved by consent:

1. Minutes of the Last Meeting: 2022.02.25