

**EXECUTIVE COMMITTEE
SCHULICH SCHOOL OF BUSINESS**

A regular meeting of the Executive Committee of Faculty Council for the 2022-23 academic year will be held remotely (via Zoom) on Friday, January 20 at 11:30 am.

AGENDA

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1.	Welcome & Chair's Remarks	
2.	Student Appeal (1)	via email
3.	Review of February Faculty Council Agenda and Documentation	2-90
4.	Other Business	
5.	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 2022-2023:

Schulich Executive Committee:

Friday, February 24, 2023
Friday, April 14, 2023
Friday, May 19, 2023

Schulich Faculty Council:

Friday, February 3, 2023
Friday, March 10, 2023
Friday, April 28, 2023
Friday, June 2, 2023

**FACULTY COUNCIL
SCHULICH SCHOOL OF BUSINESS**

A regular meeting of the Schulich Faculty Council for the 2022-23 academic year
will be held via Zoom on **Friday, February 3** from **11:30 am - 1:00pm**.

AGENDA

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1. Welcome and Chair's Remarks (5 minutes)	
2. Dean's Remarks (10 minutes)	
3. PhD/GBC/UBS Updates (10 minutes)	
4. Consultation with the Associate Vice-President, Faculty Affairs (<i>L.Bay-Cheng</i>) (30 minutes)	3-8
5. Motion: Revised Online Course Evaluation (ONCE) Form with EDI Questions (<i>L. Zhu</i>) (30 minutes)	9-12
6. Other Business	
7. Adjournment	

CONSENT AGENDA

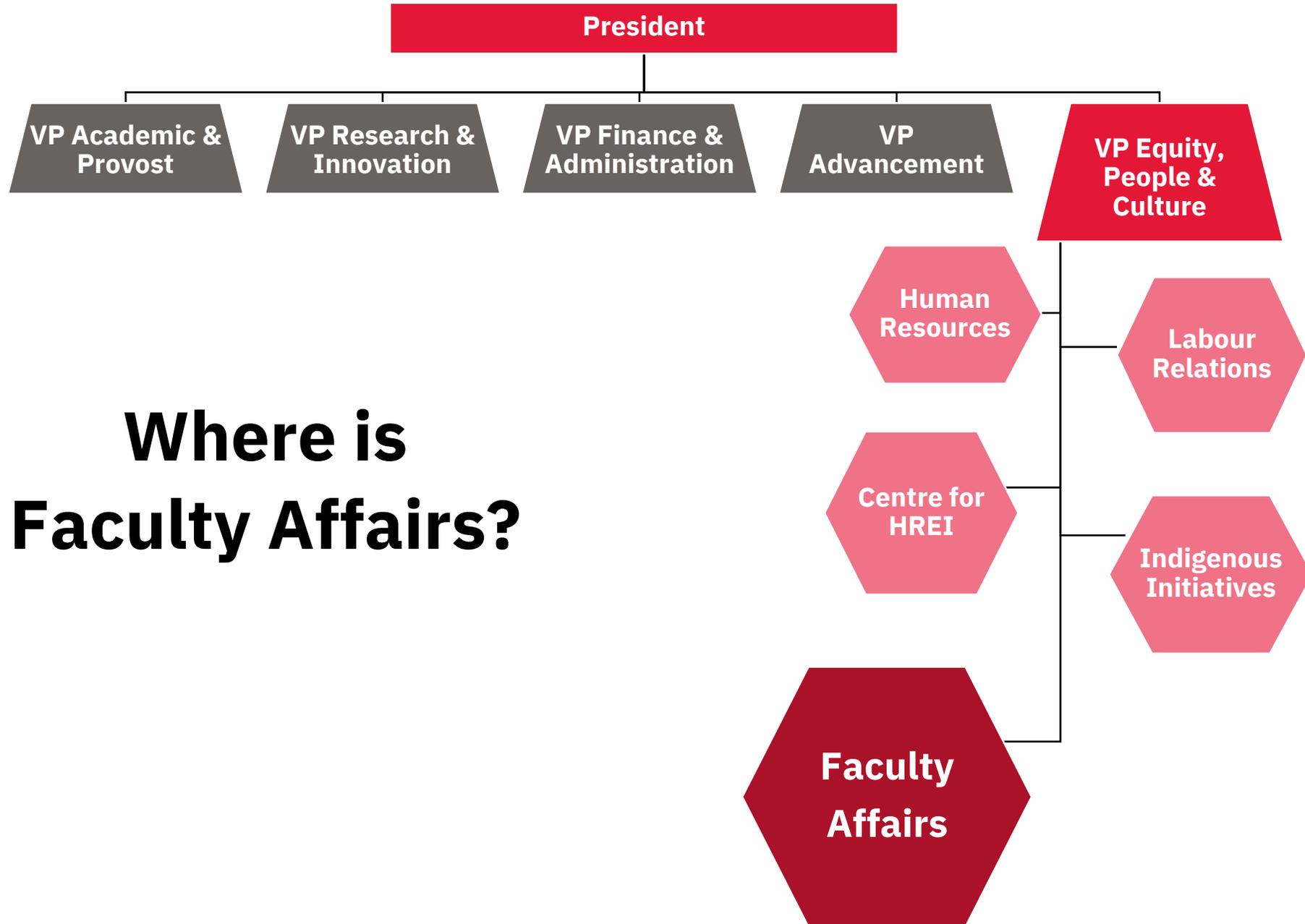
A consent agenda item is deemed to be approved unless, at any moment before or during the meeting, a member of the Faculty Council of the Schulich School of Business advises the chair of their request to debate it.

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Faculty Affairs

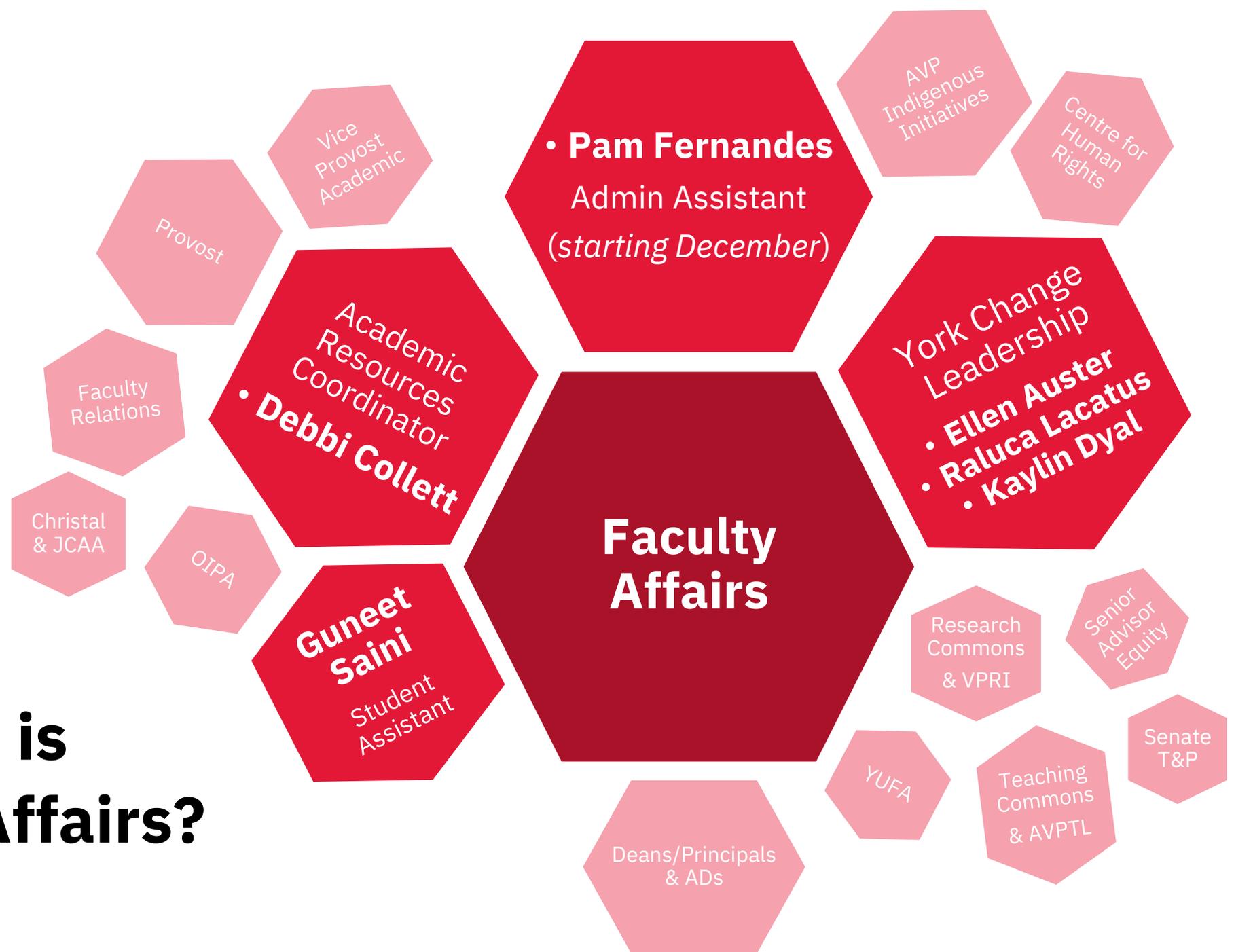
where / who / what / why / when / how





**Where is
Faculty Affairs?**

Who is Faculty Affairs?



What is Faculty Affairs?

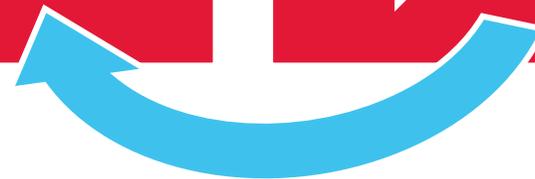
bringing new people
& ideas to York

helping them
thrive once here

Recruitment



Retention+



- Ads, website, signal-boosting
- Welcomes, orientation
- Search debriefs & prep

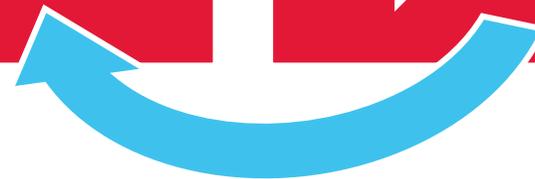
- Website & resources
- Collegial culture & skills
- Meet-ups & mentoring

**bringing new people
& ideas to York**

**helping them
thrive once here**

Recruitment

Retention+



ON A HIRING COMMITTEE?

- › Hiring Resources Folder
- › Teams
- › Zoom drop-in hours

NEW(ish) BLACK and/or INDIGENOUS COLLEAGUE?

- › Zoom meet-up: Nov 16
- › Lunch meet-up: Nov 23

NEW TO ADMIN? ADMIN CURIOUS? SEASONED ADMINISTRATOR?

- › YCL's Academic Leadership Program
 - Transitioning to Admin lunch: Nov 17
 - Striking a Research-Admin Balance: Dec 16

ON PATHWAY TO FULL?

- › Research Commons panel: Nov 2
- › December meet-up (in planning)

TEACHING STREAM?

- › January meet-up (in planning)

**What mentoring
meet-ups would
you like to see?**



<https://www.surveymonkey.com/r/meetupideas>

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Luke Zhu, Chair, Committee on Equity and Community
Date: January 4, 2023
Re: EDI Questions for ONCE Course Evaluation

Motion: That Faculty Council approve to update the ONCE (online course evaluation) form with the EDI questions as shown below.

Rationale:

To more thoroughly and objectively evaluate the degree of integration of fundamental EDI principles in teaching practices at Schulich, we suggest adding the following questions to the ONCE form. Our hope is that the answers to these questions will help us understand where we stand right now in terms of applying EDI concepts to our teaching practises, if we are doing so successfully, and where we may make improvements.

Course Evaluation Questions

U1	A comprehensive roadmap of the course (i.e. a syllabus or course outline, a breakdown with topics, assignments and exams etc.
U2	The roadmap provided was mostly followed.
U3	Important policies and procedures (e.g., attendance, participation, missed tests, late assignments, contacting instructors, etc.) were stated in the course outline.
U4	The course materials (e.g., course kits, textbooks, readings, audio visual materials, lab manuals, websites, etc.) helped me achieve the course objectives.
U5	The course activities (e.g., lectures, discussions, simulations, assignments, exercises, and presentations, etc.) helped me achieve the course objectives.
U6	The course tests/exams or final paper/essay were directly related to the course objectives.
U7	The course helped me grow intellectually.

Core Institutional Questions (Common for all courses)

Course type Specific Questions (same for LECT, ISTY, SEMR and FDEX)

C2	The COURSE encourages critical thinking skills such as problem-solving definition, decision making, judgment, analysis and
C4	The grading of assignments and exams was fair.
C5	When possible, the course materials and content represented a variety of perspectives reflecting diversity in context and literature.
I1	The INSTRUCTOR was organized and well prepared.
I2	The INSTRUCTOR presented ideas and concepts clearly.
I3	The INSTRUCTOR showed enthusiasm for the subject.
I4	The INSTRUCTOR dealt effectively with student's questions and comments
I5	The INSTRUCTOR gave adequate feedback about your progress in the course.
I6	The instructor created an equitable, diverse, and inclusive environment, where I felt safe to contribute to the course knowing that my perspectives were relevant and valued.
I7	The INSTRUCTOR created and maintained a classroom environment that was conducive to learning
I8	The INSTRUCTOR provided a reasonable amount of time outside of class to meet with students (e.g., appointments, office hour, etc.)

Course type Specific Questions (RESP)

C2	The project encourages critical thinking skills such as problem-solving definition, decision making, judgment, analysis and
C4	The grading of assignments and exams was fair.
C5	When possible, the course materials and content represented a variety of perspectives reflecting diversity in context and literature.
I1	The INSTRUCTOR was organized and well prepared.
I2	The INSTRUCTOR presented ideas and concepts clearly.
I3	The INSTRUCTOR showed enthusiasm for the subject.
I4	The INSTRUCTOR dealt effectively with student's questions and comments
I5	The INSTRUCTOR gave adequate feedback about your progress in the course.
I6	The instructor created an equitable, diverse, and inclusive environment, where I felt safe to contribute to the course knowing that my perspectives were relevant and valued.
I7	The INSTRUCTOR created and maintained an environment that was conducive to learning
I8	The INSTRUCTOR provided a reasonable amount of time to meet with students

Course type Specific Questions (FIEL)

C2	The study tour encourages critical thinking skills such as problem-solving definition, decision making, judgment, analysis and
C4	The grading of assignments and exams was fair.
C5	When possible, the course materials and content represented a variety of perspectives reflecting diversity in context and literature.
I1	The INSTRUCTOR was organized and well prepared.
I2	The INSTRUCTOR presented ideas and concepts clearly.
I3	The INSTRUCTOR showed enthusiasm for the subject.
I4	The INSTRUCTOR dealt effectively with student's questions and comments
I5	The INSTRUCTOR gave adequate feedback about your progress in the course.
I6	The instructor created an equitable, diverse, and inclusive environment, where I felt safe to contribute to the course knowing that my perspectives were relevant and valued.
I6	The INSTRUCTOR created and maintained an environment that was conducive to learning
I7	The INSTRUCTOR provided a reasonable amount of time to meet with students

Abbreviations:

FDEX - Field Experience (e.g. 601; IMBA6200) FIEL - Field Trip (e.g. MGMT6400)

ISTY - Individual Study (4900; 6900)

LECT - Lecture

RESP - Research Paper (e.g. MBAN6090; PhD) SEMR - Seminar (e.g. MFIN5000; MFIN5050)

Please write answers to the following questions about THE COURSE:

10) What aspects of the COURSE did you like or dislike?

11) How could this COURSE be improved? Please write answers to the following questions about THE INSTRUCTOR:

12) What aspects of the INSTRUCTOR did you like or dislike?

13) How could this INSTRUCTOR'S teaching style be improved?

14) What did the instructor(s) do well or not so well to maintain an equitable, diverse, and inclusive environment, to influence your comfort and safety in contributing to the class?



The Senate of York University

Synopsis

The 691st Meeting of Senate held on Thursday, 15 December 2022
via Zoom

Remarks

The Chair of Senate, Professor Mario Roy of Glendon College, welcomed Senators to the meeting.

On behalf of Senate, the Chair thanked members of the University Secretariat for their knowledge and support to Senate and welcomed new members to the Secretariat.

The Chair congratulated Vice-Chair, Poonam Puri, on receiving the *Peter Dey Governance Achievement Award* from The Governance Professionals of Canada. The Chair and the President congratulated Senator Sheila Embleton on her appointment as Interim President to Laurentian University.

The President's monthly "Kudos" report on the achievements of members of the York community can be accessed with other documentation for the meeting.

Inquiries and Communications

There were no inquiries and communications.

Reports

Under President's agenda items, the Vice-President Equity, People and Culture (VPEPC), Sheila Cote-Meek, provided an update on the Decolonization, Equity, Diversity and Inclusion (DEDI) strategy.

The VPEPC highlighted major changes to the DEDI early draft document, including addition of decolonization as a central component of the strategy, linking to the University Academic Plan (UAP) and to the United Nations Sustainable Development Goals (UNSDGs), and updated employee equity data. The draft DEDI document can be accessed in meeting document package.

Approvals

On the recommendation of its Executive Committee, Senate approved:

The Senate of York University Synopsis

the appointment of Professor Lauren Sergio, Faculty of Health for the position of Vice-Chair of Senate for the term of 1 January 2023– 30 June 2024, to be followed by a term as Chair of Senate of 1 July 2024 – 31 December 2025

Senate approved the recommendation of its Academic Policy, Planning and Research Committee to:

- Charter the Centre for Research on Earth and Space Science for a five-year period effective 1 July 2023 – 30 June 2028

Senate approved the recommendations of its Academic Standards, Curriculum and Pedagogy Committee to:

- establish the degree, Master of Health Industry Administration (MHIA), Schulich School of Business, effective FW2023-2024
- establish the Master of Health Industry Administration program, Schulich School of Business, effective FW2023-2024
- establish a diploma in accounting analytics (type 3), Schulich School of Business, effective FW2023-2024

Committee Information Reports

Executive Committee

Information items included the following:

- its approval of Senate Committee student members nominated by the Student Senator caucus
- its review of Senate Membership for the 2023-2025 period
- consideration of how to integrate representation from the Markham campus

Academic Policy, Planning and Research Committee (APPRC)

On behalf of the Committee, the Chair shared updates on the information items outlined in the written report, highlighting the Committee's priorities and initiatives in progress.

Academic Standards, Curriculum and Pedagogy Committee (ASCP)

ASCP provided Notice of Statutory Motion for the establishment of the degree type Master of Business Administration in Technology Leadership (MBA_t), Schulich School of Business.

The Senate of York University Synopsis

Tenure and Promotions

On behalf of the Committee, the Chair shared updates on information items outlined in the written report, highlighting the Committee's priorities and initiatives in progress.

Additional Information about this Meeting

Please refer to the full Senate agenda and supplementary material posted online with the **15 December 2022** meeting for details about these items.

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

January Meeting of Senate

Senate's next meeting will be held at **3:00 pm on Thursday, 26 January 2023**.

APPC's 2022/23 Budget Discussion

At both the November 10 and December 8 Council meetings in the Faculty of Liberal Arts & Professional Studies, the Dean provided members with the 2022/23 University and Faculty budget updates. In response, at both meetings, Faculty Council members expressed considerable concerns related, broadly, to matters of bicameral/collegial governance, budgetary decision-making, and the future sustainability of LA&PS' academic missions. After a full, participatory discussion at the December 8 Faculty Council meeting on these issues, these questions were referred back to the Academic Planning and Policy Committee (APPC), for consideration and action, in consultation with the Faculty Council Executive Committee.

Guided by its mandate, which includes making "recommendations to the Dean on budgetary matters that affect academic programs" and advising "the Dean on the interplay of academic and budget issues in the development of the Integrated Resource Plan," APPC hereby requests that the Executive formally ask the President, Provost, and Vice-President (Finance) to prepare a presentation that responds to the following questions when they present the university budget to the LA&PS faculty council in January.

1. Consultation, Transparency, Decision-Making

In light of the fact that SHARP was supposed to bring transparency, but there is no information or input on how much money goes from activity-generating Faculties/units to the central fund nor how it is spent, we ask the following:

- (a) Who at the University is recommending the growth of the central fund, and with what consultations?
- (b) What strategic initiatives are being contemplated to justify such a dramatic increase in Faculty contributions to a central fund? Do these initiatives include a plan for a medical school?
- (c) The proposed budget bears many unsettling similarities to events/decisions/processes that occurred at Laurentian (e.g., centralizing funds that flow out to external consultants, capital projects, etc.), all of which have been condemned by the most recent Auditor-General Report on the Laurentian bankruptcy. Will the proposed budget be analyzed through the recommendations of the Auditor-General and be reconsidered in light of those recommendations? How does the proposed budget anticipate and address those recommendations?
- (d) If money is to flow from the activity-generating units to a central fund, what role will/should those units have in determining the allocation of the central fund? How will priorities be set for allocation of the central fund resources, and how will these be governed?

2. Collegial and Bicameral Governance

We are further concerned about the potential impacts of the new centralized budgeting model for collegial governance and, specifically:

- (a) In what ways will the proposed budget shift decision-making from "academic" to "budgetary" decisions? Will the resulting centralized fund mean that fewer decisions at

the University will be part of the collegial governance model? If so, what is the imagined role for Faculty Councils in the broader decision-making processes concerning our academic mission and mandates?

- (b) More generally, what are the implications of the proposed budget for broader collegial decision-making and bicameral governance?

3. LA&PS Autonomy and Academic Mission

Finally, we are concerned about the ways that the centralized budget model may affect the academic autonomy and decision-making capacities of the Faculty of Liberal Arts and Professional Studies.

- (a) What are the specific benefits (or costs) for LA&PS in particular? How do the strategic initiatives imagined as supported by this new model directly affect LA&PS?
- (b) If revenue-generating Faculties such as LA&PS are put (back) in deficit, how do you expect Faculties to recover from or address these predicted deficits?
- (c) What are the implications of the proposed budget for resources and resource allocations in LA&PS, and how might the new budget affect Faculty autonomy?
- (d) Can York University establish a collegial decision-making body (i.e., inclusive of faculty) on budgets and resource allocation?
- (e) Is there still time, and a process by which, to change or impact (or even reverse) the current proposed budget? What are the implications of LA&PS members voting against the proposed budget, weighing in the answers to the questions above?

Amanda Glasbeek & Tokunbo Ojo
Co-Chairs, APPC

EMBA 6365 2.0 Launching and Leading Startups

1. **Program:** Kellogg-Schulich Executive MBA

2. **Course Number:** EMBA 6365

3. **Credit Value:** 2.0

4. **Long Course Title:** Launching and Leading Startups

5. **Short Course Title:** Launching and Leading Startups

6. **Effective Session:** Winter 2023

7. **Calendar (Short) Course Description:**

This is a broad survey course for innovative, entrepreneurially-minded students. It examines six of the biggest and most challenging topics that entrepreneurial CEOs must address and implement for their startups to succeed, from mitigating risk to determining effective go-to-market strategies to learning how to effectively manage the board and investors. This course does not cover how to develop startup ideas.

8. **Expanded Course Description:**

This course was designed for students who (1) want to be entrepreneurs, now or in the future; (2) are keenly interested in a career path in business innovation, whether it's working inside a new venture or innovating inside a larger firm (i.e., "intrapreneurs"); or (3) are curious about a career in entrepreneurship and innovation and want to better understand what it entails and explore if it fits well with their inherent personality traits and talents. This course does not cover how to develop your own startup idea or how to acquire a business. And while the course will touch on startup funding, it will not cover it in detail. This case-driven course examines the following six key areas that are crucial and constantly challenging aspects of launching and leading startups: (1) Determining and Mitigating Risks, (2) Product-Market Fit, (3) Go-to-Market Considerations, (4) Executing on Your Strategy, (5) Being the CEO, and (6) Startup Funding. Ultimately, the intent of this course is to give students an idea of what it's like to be in the hot seat as an entrepreneurial CEO.

9. **Course Learning Outcomes:**

Students will acquire knowledge and skills related to:

- Understanding the main challenges to be successfully addressed by entrepreneurial CEOs.
- Acquiring a set of tools to identify and analyze these challenges.
- Deciding whether such a career fits with their own talents and inherent personality traits.

10. **Rationale:**

This course is geared to those who are considering an entrepreneurial career, whether inside an existing organization or their own startup. This is the case of many of the Kellogg-Schulich Executive MBA students. We previously offered our own course on "New Venture Design" (NVD) as a compulsory capstone. However, not all our students were interested and those that were, expressed a strong interest in attending entrepreneurial courses at Kellogg or other partner schools, most of which they were unable to attend due to the

overlap with NVD. From the KS21 cohort onward, we therefore discontinued NVD and allowed our students to choose these courses as part of their global electives. Launching and Leading Startups allows them to look at the fundamental challenges associated with such a career and decide whether or not it is meant for them. This course complements the "Phase 0" course (EMBA 6545) which helps students develop and test a specific idea.

11. Evaluation:

Assessment will be based largely on the team-based performance on case assignments as well as pass-fail individual submissions (including case write-ups, exercises or short presentations) to be completed and turned in via Canvas, together accounting for 75% of the overall grade. The remaining 25% will be based on individual class contributions.

12. Integrated Courses:

NOT integrated

13. Crosslisted Courses:

NOT crosslisted

14. Faculty Resources:

This course is being offered as a global elective over two weekends during the Winter term by our partner, the Kellogg School of Management of Northwestern University. It is taught by Professor Andee Harris, Adjunct Lecturer in Entrepreneurship at the Kellogg School of Management. Professor Harris is the founder and CEO of Franklin Heritage, a private equity firm that invests in cutting-edge technology and manufacturing. Before, she was the CEO of HighGround Software, which she successfully sold to Vista Equity Partners in 2018. She was named as one of the city's most successful technology entrepreneurs by Crain's Chicago Business and nominated by the Illinois Technology as a Prominent Woman in Tech 2015, 2016, 2017 and Best Company Culture in 2018.

15. Physical Resources:

Classes for this course will be held over two weekends at the main campus of the Kellogg School of Management of Northwestern University in Evanston, IL. Kellogg will provide all the necessary physical resources.

16. Bibliography and Library Statement:

Participants are asked to prepare for the course by completing all the readings and watching all the videos (detailed in the course outline) before the corresponding class. All readings and videos will be provided to our students participating in this course through the Canvas Learning Management System of the Kellogg School of Management, to which they will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

MEMORANDUM
Peter F. Bronfman Business Library

SUBJECT: Library Statement for EMBA 6365:
Launching and Leading Startups

FROM: Kris Joseph
Business Librarian

DATE: September 21, 2021

EMBA 6365: Launching and Leading Startups is offered as a 2-credit elective for the Kellogg-Schulich EMBA program, with instruction provided by the Kellogg School of Management of Northwestern University over five intensive days of instruction. Materials for the course are offered by Kellogg, so York University Libraries' support for the course can be seen as being offered in a "backup" capacity.

1. Textbook Support

The course proposal does not recommend a specific textbook; instead, weekly readings are posted by the instructor to the course's Canvas site.

2. Additional Resources

Most readings for the course are being provided as part of Canvas posts or case pack content, but there are recommended readings suggested throughout the syllabus that have not been indicated as being provided.

- The following items are available in our collection:
 - The Sales Learning Curve is available through our Harvard Business Review subscription
- The following items are available through our consortial partners:
 - Kotler, P. and Keller, K. 2016. *A Framework for Marketing Management* [chapter 13]. Pearson: Boston.
- These are items are not currently in our collection but can be purchased at the request on the EMBA program:
 - Roberge, M. 2015. *The Sales Acceleration Formula*. Wiley & Sons: Hoboken, NJ.

Articles and other sources

YUL's *EBSCO Business Source Complete* and *ProQuest Business* databases provide access to a broad selection of major scholarly and trade publications related to entrepreneurship and the creation of startup companies.

3. Research Help & Consultation Support

Students will have access to research help and consultation services through the Bronfman Business Library. Drop-in research help services, which include telephone, email, instant messaging, and in-person help, are offered six days a week. Additionally, students can book an in-depth consultation with a business librarian. More information

about these services can be found on this webpage:
<https://www.library.yorku.ca/web/bbl/ask-a-question/>

EMBA/KIEI 470: Launching and Leading Startups

Syllabus

Winter 2022

Professor Andee Harris

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Summary:

Launching and Leading Startups (KIEI-470) is a broad survey course for innovative, entrepreneurially-minded students. It examines six of the biggest and most challenging topics that entrepreneurial CEOs must address and implement for their startups to succeed, from mitigating risk to determining effective go-to-market strategies to learning how to effectively manage the board and investors.

Ultimately, the intent of this course is to give you an idea of what it's like to be in the hot seat as an entrepreneurial CEO. The goal is to help you understand some of the critical challenges that come with the position and how to think through them.

Who should take this course:

This course was designed for students who either:

- 1) want to be entrepreneurs, now or in the future;
- 2) are keenly interested in a career path in business innovation, whether it's working inside a new venture or innovating inside a larger firm (i.e. "intrapreneurs");
- 3) are curious about a career in entrepreneurship and innovation and want to better understand what it entails and explore if it fits well with their inherent personality traits and talents.

This course does not cover how to develop your own startup idea or how to acquire a business . And while I will touch on startup funding, we will not cover it in detail.

Launching and Leading Startups is a case-driven course that examines the following six key areas that are crucial and constantly challenging aspects of launching and leading startups:

- **Determining and Mitigating Risks:** What assumptions, if they're wrong, could kill your new venture? We will examine this topic by: a) demonstrating the fast, iterative testing methods of the lean startup and b) looking at a startup's fundamental business model economics, using unit level economics to gauge and test where the biggest risk factors reside and the critical key performance indicators are for the startup.
- **Product-Market Fit:** Startup ventures often fail because the entrepreneur fails to achieve "product-market fit." They build a solution to a problem that doesn't exist, or they fail to build a solution that actually solves a real problem. We will examine areas such as: market attractiveness; market segmentation and competitive differentiation; the value proposition and what "product traction" looks like.
- **Go-to-Market Considerations:** Another key reason new ventures fail is because entrepreneurs are unable to get their product/service in the end user's hands in an economical and scalable way. We will examine: a) marketing and customer acquisition economics; b) selling and channel strategy and methods of revenue generation and c) how to sell your idea.
- **Executing on Your Strategy:** You now have a launch plan for your startup, but you know the saying from Robert Burns' poem that "The best laid plans of mice and men often go awry". What is required to successfully execute on your strategy? What happens when things change (as they inevitably do when competitors enter, customers are unhappy or vendors react)? When do you stick to your plan and when do you adapt? What partners, employees and other resources will be the difference between success and failure? We will examine the fundamentals of good business execution in a dynamic startup environment.

- **Being the CEO:** Successful entrepreneurial CEOs share a handful of traits and behaviors, which we will examine, including: self-understanding and self-regulation; grit and tenacity; optimism; flexible thinking and learning agility. Second, we will examine people and culture. Whether you like it or not, as an entrepreneurial leader you are the Chief People and Culture Officers of your startup. Third, we will discuss the importance of good board management. We will analyze successful board/mentor relationships and how to develop a process for selecting and successfully working with a board while augmenting those relationships with successful mentors.
- **Startup Funding:** We will finish the course by looking at how various investors, including angel investors and seed funds and venture capitalists examine start up opportunities and value them. We will look at the term sheet and the push and pull areas between investors and entrepreneurs. We will also touch on elements of a good pitch deck.

Course Format: *Launching and Leading Startups* is a case-driven course that contains team-based exercises. After select topics and cases, entrepreneurs, CEOs and venture capitalists will also come into the classroom (virtually, or in person, depending on our macro situation), offering their real-world perspectives on the topic of focus.

Grading will be based largely on the team-based performance on case assignments as well as the pass-fail individual submissions. Students enrolling in this class will be working in teams of 5 students.

Teams: **Please note: Teams will be randomly assigned.** You will learn who is on your team (of five) before the first class.

COURSE FORMAT AND EXPECTATIONS

Format:

Launching and Leading Startups consists of ten classes, each in a three-hour session. Classes will vary in format, from lectures to group discussions, cross-team collaborations and exercises to student presentations or guest speakers and panels. The environment will be dynamic and collaborative.

All case readings MUST be completed BEFORE the class. I will not be restating in detail what was covered in those readings or videos, but rather the goal will be to delve deeper into a particular topic area, by lecturing, through class discussion, and by bringing in virtual guests who have deep experience in the area. This format has been successful in top business schools, but it only works if everyone is prepared before class. **I will likely be cold-calling**, even over Zoom, so please come to each and every class prepared. It is important to be fully engaged to get the most out of the class so please try to keep your cameras on.

In each session, we will address a topic of relevance for starting, leading and growing a successful venture. You will use frameworks and tools that are useful in assessing the market potential of a new venture. You will learn from the experience of other entrepreneurs to understand the reasons why and how they succeeded or failed. Most importantly, you will discuss and debate your ideas with your fellow team members and classmates, building and refining them along the way.

Expectations:

First and foremost—come prepared to contribute in class. This class is effective to the extent that you speak up and benefit from each other's engagement. There are very few “right” answers in entrepreneurship, instead there are hard choices and tradeoffs that you and your team make. *The active debate in our class around these entrepreneurial tradeoffs will come from your preparation prior to class and engagement during class.* Your active listening, debate, constructive criticism and thoughtful brainstorming will help each other learn how to be more successful entrepreneurs. If you prepare, I promise you'll learn a lot and you'll give your entrepreneurial career the best possible chance of succeeding.

Specifically, **I have these expectations of each person in the class:**

- 1) **Come to class prepared to share** what you've learned from readings, personal experiences and fieldwork or research/experiments. Do your assignments and be prepared and ready to summarize and discuss key points from the readings, cases or videos. **Note: 25% of your grade is based on participation – I will cold-call, so please make sure you're prepared!**
- 2) **Attend every class, be on time** (which means be early - punctuality is a sign of commitment and respect) and stay for the entire session. If you have an unavoidable conflict and cannot attend class, please email me 24 hours in advance. **If you miss more than one class, it will likely affect your grade.** (If you are sick, please let me know. I will be understanding, give the unique situation in which we find ourselves this quarter.)
- 3) **Don't distract yourself with devices/Internet in class.** This will be particularly difficult in a virtual environment, but please don't surf the Internet while we're in class.
- 4) **Please do not record any of the classes without my approval.** Thank you.

This course adheres to the guidelines established in the Kellogg Honor Code and the Kellogg Code of Classroom Etiquette. **In summary, treat this class as you would an important business meeting.** This means you would arrive on time (probably early) and would be well prepared to engage in a meaningful way.

By the way, if some of the above seems somewhat severe, it's not meant to be. **I simply want to create the best possible environment in which you can learn.** And, I should mention, we will have fun in this class. Entrepreneurship is inherently fun and I for one will bring a lot of energy to the topic...

COURSE ASSIGNMENTS AND GRADING

Your final grade is composed of:

3 Graded Assignments	75%		Group / Individual
Class Contribution	25%		Individual
Total	100%		

ASSIGNMENTS - 75% (3 GROUP CASES)

On some days, you will receive an individual or group assignment (including case write-ups, exercises or short presentations) **to be completed and turned in via Canvas, by MIDNIGHT before our next class. If you turn it in after that time, it will not be counted.** Please prepare for every class session, with an eye to how the assignment and material will help you improve and refine your skills as a CEO or leader of an entrepreneurial organization.

Graded Group Assignments (are in addition to any other reading, case questions, etc.) and include:

1. Rent the Runway Assignment
2. Plastiq
3. Citywide Case

CLASSROOM DISCUSSION AND CONTRIBUTION - 25% (INDIVIDUAL)

All class sessions will thrive based on our active discussion of the readings, lectures, speakers & panelists as well as your completion of weekly assignments that will both further your new venture concept and allow you to participate in class more fully. It won't be as easy to participate virtually, but let's do our best. **Please come prepared to debate and share your best ideas**, and listen to and interpret the ideas presented by others. I keep track of all students' contributions to the classroom discussion throughout the quarter. While I expect that most participation will be voluntary, in order to ensure that everyone has the opportunity to be involved and comes prepared to class, I will cold-call on people.

PEER EVALUATIONS - SUBJECTIVE (INDIVIDUAL)

Each student will allocate 100 points to the members of his/her team describing the contribution that each member made including himself/herself. If there is a meaningful discrepancy in the contribution of team members, I reserve the right to adjust the team portion of their grade accordingly.

TURNING IN ASSIGNMENTS

Note that all **homework and case prep questions are due the day before our class, by midnight.**

OFFICE HOURS AND CONTACT INFORMATION

I will be available to talk on the phone. **Please contact me to make an appointment (I respond promptly to both emails and texts.)**

I can be reached at andee.harris@kellogg.northwestern.edu or on my cell at 773-251-9165.

And my T.A., Malvi Hemani can be reached at malvikhemani@gmail.com or her cell: 732-983-6611.

SUMMARY WEEKLY BREAKDOWN

Theme	Discussion & Assignment
Class 1 + 2 Jan 14	<p>Introduction, Entrepreneurial Risk, and Andee's Entrepreneurial Story</p> <p>If the definition of "entrepreneur" is someone who takes greater than normal risk, how can I effectively manage risk? What discovery tools can I use to reduce risk for my startup idea?</p> <p>Before Class:</p> <ol style="list-style-type: none"> Required Reading: "The Sure Thing", The New Yorker, Malcolm Gladwell (posted in Canvas) Required Reading: Blue Ocean Strategy: From Theory to Practice, W. Chan Kim; Renee A. Mauborgne (in case pack). Recommended listening: 'How I Built This' Podcast: Sara Blakely of Spanx.
Class 3 + 4 Jan 15	<p>Product / Market Fit (I): Needs, Markets and Value Prop</p> <p>How do I identify attractive markets and identify the customer need? What do I need to know about my target customer? How do I state my value proposition?</p> <p>Before Class:</p> <ol style="list-style-type: none"> Required Reading: e-Comics Case Required video: The Business Model Canvas (Blank). (https://www.youtube.com/watch?v=IP0cUBWTgpY) Recommended Reading: Why the Lean Startup Changes Everything, Blank. (in case pack) Recommended Reading: Distance Still Matters, Ghemawat (posted on Canvas); Managing Global Expansion, Gupta and Govindarajan (posted on Canvas). Recommended Reading: Forecasting the Adoption of a New Product (posted)
Class 5 + 6 Feb 10	<p>Product / Market Fit (II): Validation</p> <p>Go-to-Market Strategy (I): Demonstrating Traction</p> <p>We will examine the various components of the Business Model Canvas and examine how to compete inside a "Red Ocean."</p> <p>What does real market traction look like? What are key calculations you can use to gauge progress and demonstrate that you have product-market fit?</p> <p>Speaker: To be announced</p> <p>Before Class:</p> <ol style="list-style-type: none"> Read Rent the Runway Case and complete Q&A in Google Form by midnight on Feb 7th at midnight (in case pack). (Individual – Pass/Fail) Complete as a group, the Unit Economics Calculator Assignment for Rent the Runway Case in Google Form by midnight on Feb 8th. (Group – Graded). Note: this is a hard case! Set aside time for it. Recommended listening (after completing the assignment): 'How I Built This' Podcast: Jenn Hyman, Rent the Runway.

<p>Class 7 + 8 Feb 11</p>	<p>Go-to-Market Strategy: Marketing and Sales and Distribution</p> <p>Business Model Execution</p>	<p>I <i>think</i> I have product-market fit, now, how do I get my product into the hands of my targeted customers? How do I make decisions around marketing strategies and communication vehicles?</p> <p>What are my options around sales and channel strategies? How do I think about preparing and organizing my selling effort?</p> <p>I have a plan, now how do I deliver on it? What are critical aspects of early operational execution? How do I decide when to change my game plan when things aren't going so well?</p> <p>Guest Speaker: TBD</p> <p>Before Class:</p> <ol style="list-style-type: none"> 1. Read Plastiq Case and complete Q&A on Google Form by midnight on Feb 10th (in case pack). (Group - graded.) 2. Required reading: Entrepreneurial Selling. Deutsch & Wortmann. (Posted in Canvas.) 3. Recommended reading: a) The Sales Learning Curve. Leslie and Holloway; b) Designing and Managing Integrated Marketing Channels. Chapter 13. Coughlin; c) The Sales Acceleration Formula. Book by Roberge. 4. Recommended listening: Rocketship.fm: This is a five-part series (each episode ~20 minutes long) on different parts of the sales process. A) "Sales is Not a Dirty Word"; B) "The Secrets to Building a Sales Pipeline"; C) "The Art of the Pitch"; D) "Closing the Deal"; E) "Why You're Never Done Selling"
<p>Class 9 + 10 Feb 12</p>	<p>Being the CEO (I)</p>	<p>Your startup is taking off – you now need to hire, organize well and lead effectively in order to scale it. What are some of the key principles to doing this?</p> <p>Before Class:</p> <ol style="list-style-type: none"> 1. CityWide Building Services Case, read the case and prepare to deliver in class speeches (in case pack) 2. Required Reading: Collective Genius. Hill, Brandeau, Truelove and Lineback. (in case pack) 3. Required reading: a) Startups That Last. Gulati and DeSantola (in case pack); b) The Effective Executive. Drucker. (Posted in Canvas) 4. Recommended listening: a) 'Masters of Scale' with Reid Hoffman: Netflix's Reed Hastings in Culture Shock. b) Startup Podcast: Shadowed Qualities: this is one episode in a series on the founder of Gimlet Media and discusses his ups and downs as a startup CEO; c) The Reboot Podcast: "Heeding Life's Speed Bumps – with Matt Tara and Jerry Colonna" 5. Recommended readings: <ol style="list-style-type: none"> a) Leading Now: Critical Capabilities for a Complex World – HBR Publishing (Posted in Canvas) b) How to be a CEO – Adam Bryant (Posted in Canvas)

		<p>c) The Increasing Dominance of Teams in Production of Knowledge. Wuchty, Jones and Uzzi (TBD - posted on Canvas?) d) The Right - and Wrong - Stuff, chapter 7: "Understanding Your Motives." Cast. (Posted in Canvas).</p> <p>e) Why So Many Smart People Aren't Happy, Pinsker. (Posted in Canvas).</p> <p>f)The Execution Trap. Martin. (Posted on Canvas.)</p> <p>g) Geoff Smart on Hiring Talented Teams (Posted on Canvas.)</p> <p>h) Ten Marketing Blogs Every Startup Should be Following. Traywick.</p> <p>i) A Collection of the 'Best Marketing Articles of All-Time (a blogger's collection): https://ahrefs.com/blog/marketing-articles/. (Some of these articles contain good tactical advice about how to drive revenue using various marketing vehicles.)</p> <p>j) Raising Startup Capital, Bussgang (in case pack)</p> <p>k) How to Negotiate with VCs, Malhotra (in case pack)</p> <p>Recommended listening: 'Masters of Scale' with Reid Hoffman: The Money Episode — with Minted's Mariam Naficy</p>
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EMBA 6395 2.0 Leading Product Organizations

1. **Program:** Kellogg-Schulich Executive MBA
2. **Course Number:** EMBA 6395
3. **Credit Value:** 2.0
4. **Long Course Title:** Leading Product Organizations
5. **Short Course Title:** Leading Product Organizations
6. **Effective Session:** Winter 2023
7. **Calendar (Short) Course Description:**

This course is designed to prepare senior executives for product leadership roles. Students will learn how to (a) craft product-led strategies that align with the mission and core values of their organization, (b) use analytics to improve product portfolio performance and drive growth strategies while fostering a customer-centric culture, and (c) manage relationships and communicate effectively as a product leader.
8. **Expanded Course Description:**

This course is designed to prepare senior executives for product leadership roles. Students will learn how to craft product-led strategies that align with the mission and core values of their organization. They will understand how to use analytics to improve product portfolio performance and drive growth strategies while fostering a customer-centric culture in their organization. They will also learn how to manage relationships and communicate effectively as a product leader. The course has been designed to enhance students' leadership, analytical, and customer empathy skills as they prepare to lead product organizations. This course is designed to be a remote learning experience, featuring a set of eight asynchronous modules consisting of video content and exercises, complemented with four live virtual sessions. The asynchronous modules will focus on frameworks and technical concepts that are best learned in a self-paced, on-demand format. The live sessions will focus on application, interaction, and action learning. This combination of asynchronous and synchronous sessions makes for a richer learning experience than a purely in-person or a purely asynchronous experience. Participants will be expected to complete weekly asynchronous modules as well as to attend the live virtual sessions.
9. **Course Learning Outcomes:**

The overall goal of the course is to prepare students to become effective product leaders by developing their strategy, analytical and communication skills. The course will help them to:

 - Create and articulate a strong vision and align product strategy with their company's business objectives
 - Use data-driven customer insights to design better products and user experiences
 - Build product roadmaps and product portfolios that lead to customer and commercial success

- Improve communication and persuasion skills to advocate for their customers and products
- Hone their skills in financial analysis for product decisions.

10. Rationale:

Products are the lifeblood of growth and innovation, for large companies as well as for technology startups. There is a growing realization that enterprises need to create a product culture and an effective product organization. There is a growing demand for product leaders with the strategic, analytical and communication skills needed to drive product vision and product success. This course will therefore be very helpful to those among our students who are in product leadership roles or are planning to take on such roles.

11. Evaluation:

Assessment will be based on individual class participation (20%), a series of eight team-based assignments, one for each of the asynchronous content modules (worth either 5% or 10%, for a total of 60% of the course grade) as well as a capstone, consisting of a team-based simulation exercise (20%).

12. Integrated Courses:

NOT integrated

13. Crosslisted Courses:

NOT crosslisted

14. Faculty Resources:

This course will be taught by Professor Mohan Sawhney, Associate Dean, Digital Innovation, McCormick Foundation Chair of Technology, Clinical Professor of Marketing, and Director of the Center for Research in Technology & Innovation at Kellogg. Prof. Sawhney holds a Ph.D. in Marketing from the Wharton School of the University of Pennsylvania; an MBA from the Indian Institute of Management, Calcutta; and a B.Tech. in Electrical Engineering from the Indian Institute of Technology, New Delhi. He has written seven management books as well as dozens of influential articles in leading academic journals and managerial publications and has won several awards for his research and teaching. He is a pioneer in online executive education

15. Physical Resources:

This course is being offered remotely combining eight asynchronous weekly modules with four live virtual sessions of 90 minutes each by our partner the Kellogg School of Management of Northwestern University, which will provide all the necessary resources.

16. Bibliography and Library Statement:

Students are expected to be prepared with the assigned readings, pre-recorded lectures and cases for each module and participate in the four live sessions. All the videos and readings will be provided to our students through the Canvas Learning Management System of the Kellogg School of Management, to which they will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

MEMORANDUM

York University Libraries

To: Matthias Kipping

From: Stephanie Quail, Scholarly Communications Librarian, Digital Scholarship Infrastructure department

Date: November 14, 2022

Subject: Library Statement of Support – Leading Product Organizations (EMBA 6395)

Summary

York University Libraries (YUL) is well positioned to support the proposed course. EMBA students can make use of an array of remote library resources and services to meet their research and learning needs. This statement highlights offerings related to the product management themes of the course.

Collections

The Libraries' collections echo the curricular and research priorities of students and faculty. Care is given to select materials that reflect new courses taught at York, as well as research and publishing trends. Library personnel review reading lists supplied for proposed courses to address any potential gaps. Tailored purchasing profiles ensure new materials are regularly purchased on subjects such as:

- Product management, Product development, Management, & Project Management

This course is part of the Schulich Executive Management of Business Administration (EMBA) program; therefore, the students will be provided with the course learning materials at the beginning of the course. The cost of the materials is included in their course fees.

However, the Omni single-search interface provides students with access to a wide range of remote materials, including eBooks, book chapters, articles, dissertations, streaming media, etc. that students may wish to consult when completing the course. Library users may also request items from partner libraries through Omni.

A selection of electronic collections of particular interest are highlighted below.

Selection of Business Databases:

- Mergent Online
- IBISworld
- Gartner Intraweb
- Marketline Advantage
- SimplyAnalytics
- Complete listing of databases available on [Business Databases A-Z webpage](#)

Business Articles & Newspaper Collections:

- Business Source Complete
- Proquest Business Databases
- Factiva
- Nexis Uni

eBook Platforms:

- De Gruyter eBooks
- Oxford Scholarship Online
- Cambridge Core
- Taylor & Francis eBooks
- ProQuest eBook Central
- Scholars Portal Books

Services

Library Instruction

Librarians and archivists help students build research skills and digital fluencies through [workshops](#), online [research guides](#), and individual research assistance. Instructors can [arrange a research skills workshop](#) (or seminar) geared to a specific assignment, course, or competency.

Research Guides & eLearning Modules of Interest:

- [EMBA Program: Self-Paced Library Research Module](#)
- [Company Research Guide](#)
- [Industry Research Guide](#)
- [Market Research Guide](#)

Research Help

Online [research assistance](#) is available in both English and French via chat and email. In addition, students and faculty can book [one-hour research consultations](#) with a specialist librarian.

Accessibility Services

[Library Accessibility Services](#) (LAS) provides alternative content formats, as well as adaptive technologies and spaces. With a referral, York University faculty and students can request transcription services or reserve an accessibility lab workstation. Contact lashelp@yorku.ca with questions.

Northwestern | Kellogg

Leading Product Organizations
Blended Learning Elective for EMBA
Winter 2022
Prof. Mohan Sawhney

Reaching me: Prof. Sawhney:
+1 847-491-2713
mohans@kellogg.northwestern.edu

Assistant: Rahi Gurung (+1 847-467-1705, rgu131@kellogg.northwestern.edu)

COURSE OUTLINE

Overview

Products are the lifeblood of growth and innovation, for large companies as well as for technology startups. There is a growing realization that enterprises need to create a product culture and an effective product organization. There is a growing demand for product leaders with the strategic, analytical and communication skills needed to drive product vision and product success. This course is designed to prepare senior executives for product leadership roles. You will learn how to craft product-led strategies that align with the mission and core values of your organization. You will understand how to use analytics to improve product portfolio performance and drive growth strategies while fostering a customer-centric culture in your organization. You will also learn how to manage relationships and communicate effectively as a product leader. The course has been designed to enhance your leadership, analytical, and customer empathy skills as you prepare to lead product organizations.

This course is designed to be a blended learning experience, featuring a set of eight asynchronous modules consisting of video content and exercises, complemented with four live virtual sessions. The asynchronous modules will focus on frameworks and technical concepts that are best learned in a self-paced, on-demand format. The live sessions will focus on application, interaction, and action learning. This combination of asynchronous and synchronous sessions makes for a richer learning experience than a purely in-person or a purely asynchronous experience. Participants will be expected to complete weekly asynchronous modules as well as to attend the live virtual sessions.

Learning Objectives

The overall goal of the course is to prepare students to become effective product leaders by developing their strategy, analytical and communication skills. The course will help you to:

- Create and articulate a strong vision and align product strategy with your company's business objectives
- Use data-driven customer insights to design better products and user experiences
- Build product roadmaps and product portfolios that lead to customer and commercial success.

- Improve communication and persuasion skills to advocate for your customers and products
- Hone your skills in financial analysis for product decisions

Required Course Materials

The only required materials for the course are the materials posted on Canvas. Online materials contain all pre-recorded video content, exercises, cases and readings. Session slides and assignments will be posted to Canvas. ***All material and notes are the intellectual property of the instructors. You may not distribute or duplicate this material and notes without our written consent.***

Pedagogical Style

The pedagogical style will be a hybrid of pre-recorded lectures, live virtual sessions, cases, assignments, and a capstone simulation game. We will adopt a “flipped classroom” pedagogical model featuring a blended approach to learning. We will move the traditional “lecture” component of the course to an online delivery mode where students will watch short content videos in 8 modules (each module will contain 8 to 10 videos ranging from 5 minutes to 10 minutes in length), participate in online discussions and work in teams on assignments. We will complement this online learning with 4 live virtual sessions, where we will focus on action learning exercises, assignment debriefs, live case studies and team presentations. Each live session will be 90 minutes in duration and will be conducted via Zoom.

Student Expectations

Students are expected to be prepared with the assigned readings, pre-recorded lectures and cases for each module. This means you must view all pre-recorded lectures for modules leading up to the live session – each module contains 8 to 10 videos ranging from 5 minutes to 10 minutes in length. Plan your time judiciously so you can listen to these video lectures well in advance of a live virtual session. Leverage the discussion boards and teaching assistants to ask clarifying questions and submit your assignments timely. Each week, on Mondays you will get access to a new module with video lectures and corresponding assignments. Complete all assignments, discussions, and quizzes for the week before the due date, which is no later than Mondays of the following week.

Take note of the schedule of the live sessions so you can join the live sessions and interact with the faculty live. We expect every student to be *present, punctual, prepared, and participative* in all live sessions. Attendance is mandatory for all regularly scheduled live sessions. Absence from any live session without prior notification will severely affect your class participation grade. We will treat late arrivals and early departures from a live session with the same level of disrespect as an in-person session, so please arrive on time, and stay for the duration of the session.

We will “warm call” on you to present or defend your viewpoint based on the pre-recorded lectures, assigned readings or the case, so please save yourself from being embarrassed by being prepared with the material. A “warm call” means we will notify you at least 24 hours in advance of the live session that we will call on you or your team during the live session.

Overview of Course Modules

Asynchronous Modules

1. **The Chief Product Officer:** In this first module, we will understand the roles and responsibilities of the product leader, or the Chief product officer (CPO) within an organization. As a strategic leader, the CPO is responsible for developing a product vision that reflects the core values and mission of the organization, creating an effective product strategy that achieves that vision. We will discuss the evolution of the CPO role, when an organization needs to create such a role, and how the role interfaces with other functional leaders in an organization.
2. **Product Vision and Product Strategy:** The product leader is ultimately responsible for the ongoing management of their organization's product mix and guiding the decisions of future product pipelines and new product introductions. In this module, we will learn about the importance of product portfolio management, including its impact on an organization's key performance indicators (KPIs). We will discuss how to make trade-off decisions to open new markets, extend products into new adjacencies and/or discontinue product categories, optimizing the product portfolio to redistribute resources towards winning ideas, and thus driving both commercial and customer success.
3. **Customer Centricity and Jobs to Be Done:** Products start and end with the customer. In this module, we will explore how to build a customer-centric mindset and culture, the attributes of a customer-centric organization, defining the customer, and using the Jobs to be Done (JTBD) framework to build customer-centric products.
4. **Market Opportunity Analysis and Product Discovery:** As a product leader, you will be tasked with growing revenue and profits by finding and exploiting product opportunities. In this module, we will discuss how to find, evaluate, and prioritize growth opportunities, as well as how to properly structure and communicate opportunities and best practices in converting opportunities into product concepts through discovery.
5. **Taking Products to Market:** This module will focus on Go To Market (GTM) strategy – the process of taking products to market and ensuring their commercial and customer success. We will discuss the seven elements of GTM strategy, including the buyer persona, value proposition, customer acquisition strategy, routes to market, financial forecast, internal communication and operational readiness. We will discuss common pitfalls in product launches and how to ensure a successful product launch.
6. **Financial Analysis for Product Leaders:** In this module, we will focus on the financial analysis the product leaders need to conduct in making product, project and acquisition decisions. We will discuss the factors that go into pricing and packaging decisions, the key metrics stakeholders track to determine the valuation of a SaaS business, how to analyze the financial performance of a product or service, and how to analyze the profitability of a product line and product portfolio.
7. **Managing Relationships and Teams:** Product leaders need to manage relationships with many internal and external stakeholders. This module will focus on the challenges, strategies and tactics for managing relationships and leading product teams. We will discuss several challenging situations that product leaders might face, including internal stakeholder conflict and dealing with a “pet project” championed by a senior executive. We will learn strategies and tactics for influencing

- people without authority. We will conclude by understanding why product teams fail, how to manage conflict in product teams and how to improve team performance.
- 8. Managing Strategic Partnerships and Acquisitions: “Build, Buy, Ally” Decisions:** Ideally, your organization and products have all the required capabilities in place. In reality, there are gaps between actual capabilities and those needed for success. Product leaders must consider how to fill the capability gaps through build, buy or partnering strategies. We will explore how the product leaders interact with corporate business development (BD) functions; and the strategies and considerations in making build, buy or partner decisions. We will identify the key factors to consider when making a build, buy or partner decision; how build, buy and partner relationships evolve over time; and the challenges of preserving a coherent organization culture during acquisitions or partnerships.

Live Virtual Sessions

- 1. Product Leaders – Roles, Responsibilities and Challenges:** In the first part of this live virtual session, we will host a fireside chat with a few carefully selected product leaders, who will share their challenges and perspectives on leading product organizations. We will choose product leaders from startup companies as well as large technology companies like Microsoft, IBM, and Adobe. In the second part of the session, we will discuss questions related to product vision, strategy and product portfolio management.
- 2. Creating an Effective Customer Insights Program:** In the second live virtual session, we will invite a leader of a user and customer insights program (such as Dr. Nalini Kotamraju, the SVP of User Insights and Research at Salesforce) to share their perspectives on designing and leading a user insights program at a leading technology company. In the second part of the session, we will discuss recent advances in customer insight methods, such as the use of Artificial Intelligence to analyze video and focus group data, as well as product telemetry and remote user observation.
- 3. Executing with Excellence:** In this live virtual session, we will discuss the concept of flawless execution, and how to drive effective execution by simplification, delegation, and acceleration of decisions. We will also discuss how to become more effective personally by conducting a “calendar audit” of your priorities and allocation of time.
- 4. DigiStrat Capstone Simulation:** In the final live virtual session, we will discuss the results and take-aways from the DigiStrat simulation game. We will invite teams to present their strategies and we will conclude with a summary of learnings from the entire course.

Assignments and Grading

Your performance in this course will be evaluated based on a combination of assignments and participation. There are eight module-specific assignments and one final Capstone. All the assignments will be team-based.

Capstone Assignment: This assignment requires you to play the DigiStrat simulation game. DigiStrat is a state-of-the-art multiplayer simulation game that puts you in the shoes of a digital services company that provides wireless and wired data, voice, and video services to consumers as well as cloud-based services to business customers. You will compete against other teams to gain subscribers, revenues and profits in digital services. You will make decisions on service development, content development, pricing, platform development, marketing, and infrastructure development. In addition, you will bid for 5G wireless spectrum in a live auction, so that you can migrate your customers from 4G wireless services to the newer 5G services.

DigiStrat teaches you how to make strategic decisions for a subscription-based business, which is becoming the dominant business model for software-based industries. The DigiStrat simulation is available through Harvard Business School Publishing. Detailed instructions for using the simulation will be provided along with access to the simulation. The write-up for this assignment should be presented as a report not exceeding 7 single-spaced pages, excluding exhibits.

The allocation of points for each element of the evaluation is as follows:

Grade Component	Details	% of Course Grade
Module 1 Assignment	The CPO Canvas	5%
Module 2 Assignment	Portfolio X-Ray	5%
Module 3 Assignment	Defining the Customer	5%
Module 4 Assignment	Designing an Experience	10%
Module 5 Assignment	GTM Strategy audit for your product	10%
Module 6 Assignment	SaaS Economics – Unit Economics and Profitability Assessment	5%
Module 7 Assignment	The Product Leader’s Dilemma – Saying no to Engineering	10%
Module 8 Assignment	BrapoTech Case – Building to Scale	10%
Capstone Assignment (DigiStrat simulation)	N/A	20%
Class Participation and Attendance	N/A	20%

Attendance Policy

We would like you to attend all classes barring emergencies, but we understand that you may have pressing commitments. Keeping this in view, you are allowed to miss a **maximum of one live session**, after informing us in advance about your intended absence. You need to complete all of the 8 asynchronous modules. If you miss any sessions beyond the permissible one, you will lose 5% of your grade for each additional session missed. To allow us to monitor attendance, we will track your login to the live sessions.

Honor Code

All students are expected to abide by the following honor code:

- Respect the privacy of other participants
- Respect the diversity of opinions and cultures that will be present in your course
- Do not reproduce content from your course or from other participants unless expressly allowed under the copyright terms of the course
- Do not submit the work of others as your own work or engage in any activity that will improve or harm others' points

Participants are individually accountable for the work they submit. They must not submit the work of others as their own or engage in any activity that will improve or harm the others' points. Plagiarism is a form of academic dishonesty.

Session Schedule

Lectures and content will be released to Canvas weekly based on the start date for each module. You will have one week from the start date for each module to see the lectures and complete that module's assignment. The module and live session schedule is as follows (live sessions will take place at 8:00am Central):

Module	Modality	Topic	Start Date
1	Recorded Videos	The Chief Product Officer	Wednesday, January 11, 2023
	Live Session 1	Product Leaders – Roles, Responsibilities and Challenges	Wednesday, January 18, 2023
2	Recorded Videos	Product Vision and Strategy	Wednesday, January 25, 2023
3	Recorded Videos	Customer-Centricity and Jobs to be Done	Wednesday, February 1, 2023
4	Recorded Videos	Market Opportunity Analysis and Product Discovery	Wednesday, February 8, 2023
	Live Session 2	Building an Effective Customer Insights Program	Wednesday, February 15, 2023
5	Recorded Videos	Taking Products to Market	Wednesday, February 22, 2023
6	Recorded Videos	Financial Analysis for Product Leaders	Wednesday, March 1, 2023
	Live Session 3	Executing with Excellence	Wednesday, March 8, 2023
7	Recorded Videos	Managing Relationships and Teams	Wednesday, March 15, 2023
8	Recorded Videos	Managing Strategic Partnerships and Acquisitions: “Build, Buy, Ally” Decisions	Wednesday, March 22, 2023
	Live Session 4	DigiStrat Capstone Assignment	Wednesday, March 29, 2023

Course Change Proposal – Value Creation and Capture in Healthcare

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

Kellogg-Schulich Executive MBA Program

2. Course Number and Credit Value

EMBA 6285 2.00

3. Course Title

a) Long Course Title

Value Creation and Capture in Healthcare

b) Short Course Title

Value Creation and Capture in Healthcare

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
	other (please specify)

6. Effective Session of Proposed Change(s)

Winter 2023

7. Academic Rationale

8. Proposed Course Information

Existing Course Information (Change from)	Proposed Course Information (Change to)
<p><i>Long Title:</i> Value Creation and Capture in Healthcare</p> <p><i>Short Title:</i> Value Creation and Capture in Healthcare</p>	<p><i>Long Title:</i> Managing Healthcare Services in a Value-Based Setting</p> <p><i>Short Title:</i> Managing Healthcare Services</p>

9. Consultation

N/A

Originator

Griffin Myers

Signature

Date

Griffin Myers

Name

Area or Specialization

Approvals:

Area or Specialization

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

Matthias Kipping

Signature

Nov. 22, 2022

Date

Matthias Kipping

Name

Kellogg-Schulich Executive MBA

Area or Specialization

Degree Program

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

Matthias Kipping

Signature

Nov. 22, 2022

Date

Matthias Kipping
Name of Program Director

Kellogg-Schulich Executive MBA
Program

Program Committee

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

Kevin Tasa
Signature

Nov. 22, 2022

Date

Kevin Tasa
Name of Committee Chair

Kellogg-Schulich Executive MBA
Committee

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.

Northwestern University

Kellogg School of Management

[Value Creation and Capture in Healthcare](#)

HCAK-951-5 (0.5 Credit)

Winter 2022

Griffin Myers, M.D., M.B.A., F.A.C.E.P.

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Students can find useful resources for safety and security, academic support, and mental and physical health and well-being on the NU help [website](#) and [app](#).

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Course Introduction

A. Required Material

- a. Textbook: Kongstvedt, P. Essentials of Managed Health Care, 6th Ed., Jones & Bartlett Learning, 2012. ***N.B., This is a great text book. I realize that it is not short and this is a busy weekend with multiple courses. For the purposes of the course, it will be sufficient that you skim those readings, understanding the introductions and conclusions and focusing on the***

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figures. This is a great way to get the most out of the time you put into this textbook.

That said, for those intending to build and/or extend a career in healthcare management, you should invest some time before, after, or during the course to engage with this material. Success in this field requires an attention to detail that is described in this text.

- b. Articles: As noted below.

B. Course Overview

- a. Overview
 - i. Value in healthcare is the quality and experience of the health outcome divided by the price. This course is a study of value creation and capture in U.S. healthcare delivery. As such, the focus of the course is on healthcare services and the provision of care to patients, primarily focusing on the American context but with applicability to global markets. We will not, beyond the occasional mention, be discussing ancillary industries or other inputs/products such as pharmaceuticals, durable medical equipment, or long-term care. Our objective is to understand how the healthcare system is organized (or not) and managed (or not) so that we can create and capture value through the delivery of care.
- b. Organization
 - i. The course is organized into two parts: value creation and value capture. We will begin with an overview of the U.S. healthcare system to understand the underlying economics of the industry and the dynamics that exist in a complex market. From there we will explore the infrastructure and mechanics that drive the industry throughout the value chain. Much of this is strategic, though we will explore, in specific examples, the minutia to highlight opportunities for innovation in the market. The last section of the course will focus on value capture and new business models that are changing the landscape of care delivery.
- c. Requirements
 - i. The course applies to the case situations some of the concepts and techniques learned in Competitive Strategy (Business 42001), thus that course is required. This course also places a strong emphasis on presentation and discussion skills. It will be important to explain your positions or arguments to each other and to try to argue for the

implementation of your recommendations. Believe it or not, we will talk a bit about risk management and thus some familiarity with the techniques or concepts of option pricing may be helpful.

C. Course Procedures

- a. This course is designed to be a time-consuming and challenging course. Unless you have the time to do 3-5 hours of reading per week, I strongly recommend not taking the course. For each week's reading assignment we will have an in-class quiz over the entirety of the week's required reading. This includes the first meeting. The quizzes will focus on the important concepts and implications of the reading, therefore memorization is unlikely to help; you must have read the material and thought about it to perform well on the quizzes.

D. Grading

- a. Grading will be based upon:
 - i. Final Exam (50%): The final examination will count for 50% of the final grade. The final examination will be an individual, take home exam. The final exam will be available after the final class session. It will be due by 11:59 PM CT on Friday, March 4, 2022. There will be no exceptions to this schedule for anyone.
 - ii. Individual case assignment (details posted on Canvas) (15%)
 - iii. Class Participation (35%): Class attendance is expected, and students are encouraged to contribute to class discussion. Participation is the key to a lively class. Class participation provides the opportunity to practice speaking and persuasive skills, as well as the ability to listen. Comments that are vague, repetitive, unrelated to the current topic, disrespectful of others, or without sufficient foundation will be evaluated negatively. What matters is the quality of one's contributions to the class discussion, not the number of times one speaks. It is my hope that all students in the course are judged to be outstanding contributors as below. The following are Guidelines for evaluating class participation:
 1. Outstanding Contributor: Contributions in class reflect exceptional preparation. Ideas offered are always substantive, and provide one or more major insights as well as direction for the class. Challenges are well substantiated and persuasively presented. If this person were not a member of the class, the quality of

discussion would be diminished markedly. (Contribution at this level earns the full 50% of the 50% possible.)

2. Good Contributor: Contributions in class reflect thorough preparation. Ideas offered are usually substantive, provide good insights, and sometimes direction for the class. Challenges are well substantiated and often persuasive. If this person were not a member of the class, the quality of discussion would be diminished. (Contribution at this level earns 45% of the pm 50% possible.)
 3. Adequate Contributor: Contributions in class reflect satisfactory preparation. Ideas offered are sometimes substantive, provide generally useful insights but seldom offer a new direction for the discussion. Challenges are sometimes presented, fairly well substantiated, and are sometimes persuasive. If this person were not a member of the class, the quality of discussion would be diminished somewhat. (Contribution at this level earns 35% of the 50% possible.)
 4. Non-Participant: This person says little or nothing in class. Hence, there is not an adequate basis for evaluation. If this person were not a member of the class, the quality of discussion would not be changed. (Contribution at this level earns 25% of the 50% possible.)
 5. Unsatisfactory Contributor: Contributions in class reflect inadequate preparation. Ideas offered are seldom substantive, provide few if any insights, and never a constructive direction for the class. Integrative comments and effective challenges are absent. If this person were not a member of the class, valuable air-time would be saved. (Contribution at this level earns 0% of the 50% possible.)
- iv. Requests for regraded may be submitted and considered, however students should be aware that new grades based upon a regrading assessment may go up or down.
 - v. *Note: Students cannot take this course pass/fail.*

E. Guests

- a. It is my policy to invite guests with relevant expertise to class in occasional course meetings. This is subject to change.

F. Office Hours

- a. I will do my best to accommodate requests for office hours, including virtual office hours. Please email me with at least 5 days notice. Please be flexible in meeting over the phone or via Skype/video call.

G. Use of Devices in Class

- a. While I welcome the use of technology to support learning, the mere presence of devices tends to negatively affect the quality of discussion. Please do your best to use devices to the benefit of the discussion and not for other priorities. If you are expecting a call, be sure your device is on silent. Better yet, reschedule the call. As a courtesy and out of respect for patient privacy, I can assure you that other healthcare professionals in the room who, like myself, may receive an urgent/emergent call from a patient, will do the same.

H. Attendance

- a. Attendance in all sessions is expected. Given the nature of the participation grade, missing a session, especially in such a short course, is likely to materially negatively impact a student's grade.

Class Schedule

Schedule is given by week with required reading and cases as noted.

Schedule

	Title	Day	Date	Time	Location
1a	Introduction to Value Creation in Health Care	Saturday	15 Jan 2022	1:00 PM CT	Chicago
1b	Economics of Care Delivery	Saturday	15 Jan 2022	2:45 PM CT	Chicago

2a	Introduction of Health Insurance and Managed Health Care & Network Contracting and Provider Payment	Tuesday	25 Jan 2022	6:00 PM CT	Zoom
2b	Management of Utilization and Quality & Sales, Finance, and Administration	Tuesday	25 Jan 2022	7:45 PM CT	Zoom
3a	Special Markets & Laws and Regulations	Tuesday	8 Feb 2022	6:00 PM CT	Zoom
3b	New Models of Value Creation	Tuesday	8 Feb 2022	7:45 PM CT	Zoom
4a	New Models of Value Creation (Continued)	Friday	11 Feb 2022	1:00 PM PT	San Francisco
4b	Introduction to Value Capture in Health Care	Friday	11 Feb 2022	2:30 PM PT	San Francisco
5a	Economics of Value-based Care Models	Saturday	12 Feb 2022	9:00 AM PT	San Francisco
5b	New Models for Value Capture	Saturday	12 Feb 2022	10:45 AM PT	San Francisco

Readings & Discussion Topics

	Title	Readings	Discussion Topics
1a	Introduction to Value Creation in Health Care	- Course Syllabus	<ul style="list-style-type: none"> - Course Introduction - How to Be Successful in This Course & Later - Objectives of a Healthcare System - Value in Healthcare - Healthcare Value Chain - Aggregates - Price Mechanisms & Market Failures

The information contained in these documents is confidential, privileged and only for the information of the intended recipient and may not be used, published or redistributed without the prior written consent of the faculty member(s) teaching the course.

1b	Economics of Care Delivery	- Kongstvedt, Preface	<ul style="list-style-type: none"> - Prices & Costs - Employment (Provider Deep Dive) - Payers, Providers, and the Distinction - "Is health insurance?" - On Market Failures and the Affordable Care Act
2a	Introduction of Health Insurance and Managed Health Care & Network Contracting and Provider Payment	<ul style="list-style-type: none"> - Kongstvedt, Part I - Kongstvedt, Part II - Kongstvedt, Part III, Chapters 7-8 	<ul style="list-style-type: none"> - History of Managed Care - Insurance Markets - Types of (Actuarial) Products - Governance & Management - Delegated Services - Fee-for-service: A Deep Dive - Variation - Utilization & Prices - Benefit Design - Demand Management - Utilization Management - Clinical Care - PICO Model - Disease Management - (Complex) Case Management - MLR
2b	Management of Utilization and Quality & Sales, Finance, and Administration	<ul style="list-style-type: none"> - Kongstvedt, Part III, Chapters 9-15 - Kongstvedt, Part IV 	<ul style="list-style-type: none"> - Principles of Working with or Managing Physicians - Provider Quality Measurement: Theory & Practice - Part D (Quickly) - Behavioral Health - Quality Improvement - Accreditation - Marketing & Sales (Retail & Consumer Trends) - Persistency - Claims 201: IBNR & Timing
3a	Special Markets & Laws and Regulations	<ul style="list-style-type: none"> - Kongstvedt, Parts V & VI - Kongstvedt, Glossary - Mirror, Mirror 2017: International Comparison Reflects Flaws and Opportunities for Better U.S. Health Care (https://interactives.commonwealthfund.org/2017/july/mirror-mirror/) 	<ul style="list-style-type: none"> - Introduction to Medicare Advantage - Medicare Advantage Bidding & Payments - Risk Adjustment - Global Managed Care - Values & Healthcare "System" Design

The information contained in these documents is confidential, privileged and only for the information of the intended recipient and may not be used, published or redistributed without the prior written consent of the faculty member(s) teaching the course.

		<p>- Carroll, A. Frakt, A. The Best Health Care System in the World: Which One Would You Pick?, The New York Times, September 18, 2017 (https://www.nytimes.com/interactive/2017/09/18/upshot/best-health-care-system-country-bracket.html)</p>	
3b	New Models of Value Creation	<p>- Gawande A. The Cost Conundrum. The New Yorker. June 1, 2009. (https://www.newyorker.com/magazine/2009/06/01/the-cost-conundrum)</p> <p>- Gawande A. The Hot Spotters. The New Yorker. January 24, 2011. (https://www.newyorker.com/magazine/2011/01/24/the-hot-spotters)</p> <p>- Schroeder, S. We can do better--improving the health of the American people. New England Journal of Medicine, 2007;357:1221-8. (https://www.nejm.org/doi/full/10.1056/NEJMsa073350)</p>	<ul style="list-style-type: none"> - A Framework for Value Creation - Service Innovation
4a	New Models of Value Creation (Continued)	<p>- Gawande A. Letting Go. The New Yorker. August 2, 2010. (https://www.newyorker.com/magazine/2010/08/02/letting-go-2)</p> <p>- Gawande A. Big Med. The New Yorker. August 13, 2012. (https://www.newyorker.com/magazine/2012/08/13/big-med)</p>	<ul style="list-style-type: none"> - Service Integration - Operational Enhancement - Performance - Incentive Optimization
4b	Introduction to Value Capture in Health Care	<p>- Quinn, K. The 8 Basic Payment Methods in Health Care, Annals of Internal Medicine. 2015;163:300-306. (https://mfprac.com/web2019/07/literature/literature/Health_Costs/Payment_Quinn.pdf)</p>	<ul style="list-style-type: none"> - Pricing & Value Capture - Histogram of Spend & Linear Model & Implications

5a	Economics of Value-based Care Models	<ul style="list-style-type: none"> - Medicare Payment Advisory Commission. Report to the Congress, 2020. See pages 365-402. (http://medpac.gov/docs/default-source/reports/mar20_entirereport_sec.pdf?sfvrsn=0) - “Medicare Advantage Achieves Cost-Effective Care and Better Outcomes for Beneficiaries with Chronic Conditions Relative to Fee-for-Service Medicare,” Avalere, July 2018. (https://img04.en25.com/Web/AvalereHealth/%7B914072d2-41c3-4645-84e0-2ac8f761be2e%7D_BMA_Report.pdf) - Mandal AK, et al. “Value-Based Contracting Innovated Medicare Advantage Healthcare Delivery and Improved Survival,” Am J manag Care, 2017;23(2). (https://www.ajmc.com/journals/issue/2017/2017-vol23-n2/value-based-contracting-innovated-medicare-advantage-healthcare-delivery-and-improved-survival) - Huckfeldt PJ, “Less Intense Postacute Care, Better Outcomes For Enrollees In Medicare Advantage Than Those In Fee-For-Service,” Health Affairs 36, no.1 (2017):91-100. (https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5521268/) - Curto V, et al. “Healthcare spending and utilization in public and private Medicare,” NBER 23090, January 2017. (https://www.nber.org/papers/w23090) 	<ul style="list-style-type: none"> - Medicare Advantage as a Laboratory: FFS, PPO, HMO, Capitation - Match Capture with Creation - Bundles & IPUs - Medicare for All: Solving for the Hospitals 123% - Direct Contracting - Principles of Value-based Care
5b	New Models for Value Capture	<ul style="list-style-type: none"> - Harvard Business School Case: Oak Street Health: A New Model of Primary Care - Porter, M. What is value in healthcare? New England Journal of Medicine, 23 December 2010. (http://vbhcprize.com/wp-content/uploads/2014/03/Porter-What-is-value-in-health) 	<ul style="list-style-type: none"> - Case Discussion: Oak Street Health - Covid-19 - Implications of Value-based Models - Course Wrapup

	care.pdf	
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Course Change Proposal – Social Dynamics and Networks

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

Kellogg-Schulich Executive MBA Program

2. Course Number and Credit Value

EMBA 6510 2.00

3. Course Title

a) Long Course Title

Social Dynamics and Networks

b) Short Course Title

Social Dynamics and Networks

4. Existing Pre-requisites/Co-Requisites

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
	other (please specify)

6. Effective Session of Proposed Change(s)

Winter 2023

7. Academic Rationale

While the course itself has not been changed, the revised title better reflects the actual course content and its focus on networks as a key success factor for individuals and organizations.

8. Proposed Course Information

Existing Course Information (Change from)	Proposed Course Information (Change to)
<i>Title: Social Dynamics and Network</i>	<i>New Title: Winning with Networks</i>

9. Consultation

N/A

Originator

_____ Signature	_____ Date
_____ Name	_____ Area or Specialization

Approvals:

Area or Specialization

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

_____ Signature	_____ Date
_____ Matthias Kipping Name	_____ Kellogg-Schulich Executive MBA Area or Specialization

Degree Program

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

_____ Signature	_____ Date
_____ Matthias Kipping Name of Program Director	_____ Kellogg-Schulich Executive MBA Program

Program Committee

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

Signature

Date

Kevin Tasa

Name of Committee Chair

Kellogg-Schulich Executive MBA

Committee

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.

Winning with Networks

MORSX 945

2023*

Professor Dashun Wang

Phone: 847-491-8070

E-mail: dashun.wang@kellogg.northwestern.edu

Office hour: By appointment

Teaching Assistant

Yian Yin

Office hour: By appointment

* This syllabus is subject to change

Description

Leaders face new levels of connectivity, complexity, and unpredictability. This course prepares leaders to use the powerful tools of computational thinking and network science to better anticipate, understand, and respond to these challenges. The content involves in-depth training within vis-a-vis diverse use cases, including network effects, managing personal and professional networks, innovation adoption, influentials, social contagion, crowdsourcing, hot streaks, and prediction markets. Content delivery is lecture-based with in-class experiential exercises. Students leave the course with a practical toolkit for leadership vision enhancement, value creation and capture, and the contagious adoption of your ideas and innovations.

Course Requirements and Assignments

Your final grade is composed of:

1. Course Contribution 20%+30%
2. Group project 35%
3. Course assignments 15%

Course Contribution (20%+30%):

Individual Attendance (20%): Regular attendance is expected. If you must miss a class, notify the instructor at least 24 hours in advance via email to make sure the one-time absence will not affect your overall attendance grades. This is also essential for the teaching team to make arrangements for any in-class exercises and so that you can be certain to get the materials that will be distributed during the class.

Note that there are classes where your presence is not only important to yourself but to your fellow classmates. There are sessions that you must attend, which are indicated in the schedule section of this syllabus. If you will have to miss any of these classes, you must email the professor by the beginning of the 2nd week. Otherwise I will assume you will be in class.

Individual Participation (30%): Most class sessions involve active discussions, with an emphasis both on theoretical questions and practical implications. You should be prepared to share your ideas and to listen to and interpret the issues presented by others. Most participation will be voluntary; however, in order to ensure that everyone has the opportunity to be involved, individuals will often be called upon “cold.” We recommend you turn on your video when you’re on Zoom and when it is appropriate to do so.

Quality discussion comments possess one or more of the following attributes:

- Offer a relevant perspective on the issue.
- Provide careful analysis.
- Apply the theory and concepts offered in the readings and lectures.
- Move the discussion forward by building on previous contributions with new insights; do not repeat points already made by others.

Group Project (35%):

This group-based project helps students apply network toolkits to tap into new market opportunities. Students are expected to work in teams, which are assembled by a random algorithm that takes into account the diversity in backgrounds and expertise within the team. The final deliverables of the project are due two weeks after the class.

Course Assignments (15%)

Short assignments will equip you with practical experience applying the tools from class.

All assignments are due by 11:59 pm on the day indicated.

Late assignments will be penalized 10% for the first 24 hours, and 20% for the first 48 hours

Assignments more than 48 hours late will not be accepted.

This policy will be strictly enforced. No exceptions will be granted.

Honor Code

As with all Kellogg courses, by enrolling in this course you agree to abide by the Kellogg Honor Code (http://www.kellogg.northwestern.edu/stu_aff/policies/honorcode.htm). In this course you may (and are encouraged to) discuss both the individual assignments and group assignment with your fellow students; however, the finished product that you submit must be entirely your own work. If you have any questions regarding how the honor code applies to this course, please see the instructor.

Readings

All readings are available on Canvas. There is no textbook for the course. Readings are *optional* unless noted otherwise - they are intended for you to refer to if you need to revisit a concept. Readings marked as (Advanced) are more difficult and are provided only for those interested in exploring a specific topic in more depth.

Schedule

Warning: This schedule is subject to change

Day 1 — Hidden Principles of Success

Too often, accomplishment does not equate to success. We did the work but didn't get the promotion; we played hard but weren't recognized; we had the idea but didn't get the credit. We've always been told that talent and hard work are the key to success, but in today's world these efforts by themselves rarely yield results. In a world of growing complexity and interconnectedness, success and recognition seem to have only a tenuous link to effort, skill or inherent excellence. Instead, they are determined by less obvious factors of human behavior that influence how attention flows through social networks. This lecture will introduce several recent groundbreaking research revealing the hidden principles of success, which uses big data to pull back the curtain on the social dynamics that govern success. These science-based principles that drive success offer a new understanding of the very foundation of the how people excel in today's society.

Samuel J. Palmisano, "A Note to Fellow CEOs," *Capitalizing on Complexity: Insights from the Global Chief Executive Officer Study*, IBM, 2010.

Robert M. May, Simon A. Levin, and George Sugihara (2008) "Complex systems: Ecology for bankers," *Nature* 451, 893-895. (advanced)

Chris Anderson, "The Long Tail," *Wired*, 2006.

W. B. Arthur, "Competing technologies, increasing returns, and lock-in by historical events," *The Economic Journal* 1989. (Advanced)

Assignment 1 out

Day 2 — Networks, and their Organizing Principles

Networks are pervasive—from the human brain to the Internet to the economy to our group of friends. These linkages, it turns out, aren't random. All networks have an underlying order and follow simple laws. This class will introduce several foundational concepts of network science, including Small World; Six Degrees of Separation; Scale free network. Late comers; Network Robustness; Navigating a network; Friendship paradox, and more. Understanding the organizing principles of these networks will help us do some amazing things, from designing the optimal organization of a firm to stopping a disease outbreak before it spreads catastrophically.

Recommended “reading”: Watch *The social dilemma* on Netflix: <https://www.netflix.com/title/81254224>
Nicholas A. Christakis and James H. Fowler. “Changing What We Do, or Changing What We Think?” *Connected*, 2011.

Barabasi. *Network Science*. Chapter 1

M. E. J. Newman. *Networks: An Introduction*. Chapter 1 and Sections 6.1 and 6.2. (Reference)

Malcolm Gladwell, “Six Degrees of Lois Weisberg,” *The New Yorker*, January 11, 1999.

Day 3 — Network Effects

Although software has become easier to build, launching and scaling new products and services remains difficult. Teams launching new products must consider the advantages of “the network effect,” where a product or service’s value increases as more users engage with it. Apple, Google, Microsoft, and other tech giants utilize network effects, and most tech products incorporate them, whether they’re messaging apps, workplace collaboration tools, or marketplaces. Network effects provide a path for fledgling products to break through, attracting new users through viral growth and word of mouth. But, what exactly are network effects? How do teams create and build them into their products? How do products compete in a market where every player has them? This class draws from examples of BMW, Slack, LinkedIn, Zoom, Dropbox, Tinder, Uber, Airbnb, and more, to provide practical frameworks and principles that can be applied across products and industries and offer unique insights into what is becoming the number one principle for scaling business and defending against competitors: The Network Effects.

“Managing Our Hub Economy: Strategy, ethics, and network competition in the age of digital superpowers” by Marco Iansiti and Karim R. Lakhani, Harvard Business Review

“Why Some Platforms Thrive and Others Don’t: What Alibaba, Tencent, and Uber teach us about networks that flourish. The five characteristics that make the difference.” by Feng Zhu and Marco Iansiti, Harvard Business Review

Day 4 — Going Viral: Persuasion through connections

Why do some things take-off while others don't? The classic mythology of success conveniently ignores the “chicken-egg” problem, skipping the part of the story when the network is sparse and lacks activity. But, in reality, crossing the tipping point is easier said than done, and if leaders don't solve the “chicken-egg” problem, the result is failure. Drawing from examples of Facebook, Google, Slack, Tinder, Uber, Bank of America, and more, this class will take a rigorous look at the fundamental forces that shape the word-of-mouth dynamics. What exactly is the tipping point? How do we create contagions and cascades? What is the optimal type of network to start with? How do you design viral features so you can let your network do the work for you?

Jill Lepore, “It's Spreading,” *The New Yorker*, June 1, 2009.

Damon Centola and Michael Macy, “Complex contagions and the weakness of long ties,” *American Journal of Sociology*, 113(3): 702–34, 2007. (Advanced)

Sinan Aral and Dylan Walker, “Creating Social Contagion Through Viral Product Design: A Randomized Trial of Peer Influence in Networks,” *Management Science*, 2011, 57(9): 1623–1639. (Advanced)

Assignment 2 out

Day 5 — Crowd Intelligence

Eric Schimdt once said, “The Next \$100 Billion dollar company will be driven by crowd-based solutions.” This class will explore a deceptively simple idea—the wisdom of crowds—and how it is dramatically impacting the way in which leaders and companies search for tomorrow's biggest ideas. Indeed, studies after studies have shown that large groups of people are smarter than an elite few, no matter how brilliant—better at solving problems, fostering innovation, coming to wise decisions, even predicting the future. We will explore the basic principles behind crowd intelligence, evaluate the relative benefits of accuracy and diversity in forecasting, understand when to use experts or crowds, and how to engage crowds for solving complex problems and discovering innovations. We will visit cases from Netflix, Fold-It, Top Coder to equip you with the toolkit to analyze when and why diverse groups outperform high ability groups.

✳ *In Class Activity. The Wisdom of the Class.*

Sharad Goel, Daniel M. Reeves, Duncan J. Watts, and David M. Pennock, “Prediction Without Markets,” 2010, *Proceedings of the 11th ACM Conference on Electronic Commerce*, 357–366. (Advanced)

Eliot Van Buskirk, “How the Netflix Prize Was Won,” *Wired*, September 22, 2009.

Scott E. Page, “Making the Difference: Applying a Logic of Diversity,” *The Academy of Management Perspectives*, 21(4): 6-20, 2007.

K.R. Lakhani and J.A. Panetta, “The Principles of Distributed Innovation,” *Innovations: Technology, Governance, Globalization* 2, no. 3 (2007): 97-112.

Jeff Howe, “The Rise of Crowdsourcing,” *Wired*, June, 2006.

Course Change Proposal – Beyond Diversity – The Fundamentals of Inclusive Leadership

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

Kellogg-Schulich Executive MBA Program

2. Course Number and Credit Value

EMBA 6755 2.00

3. Course Title

a) Long Course Title

Beyond Diversity: The Fundamentals of Inclusive Leadership

b) Short Course Title

Beyond Diversity

4. Existing Pre-requisites/Co-Requisites

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 checked="" 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 type="checkbox"/>	other (please specify)

6. Effective Session of Proposed Change(s)

Winter 2023

7. Academic Rationale

This revision goes back to the original title when the course was first approved. The current title ("Beyond Diversity") is less reflective of the actual focus on leading and managing diverse organizations.

8. Proposed Course Information

Existing Course Information (Change from)	Proposed Course Information (Change to)
<p><i>Long Title:</i> <i>Beyond Diversity: The Fundamentals of Inclusive Leadership</i></p> <p><i>Short Title:</i> <i>Beyond Diversity</i></p>	<p><i>Long Title:</i> <i>Leading and Managing Diverse Organizations</i></p> <p><i>Short Title:</i> <i>Managing Diverse Organizations</i></p>

9. Consultation

N/A

Originator

Signature

Date

Name

Area or Specialization

Approvals:

Area or Specialization

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

Nicholas Pearce

Signature

Date

Nicholas Pearce

Name

Kellogg-Schulich Executive MBA

Area or Specialization

Degree Program

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

Matthias Kipping

Signature

Date

Matthias Kipping
Name of Program Director

Kellogg-Schulich Executive MBA
Program

Program Committee

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

Kevin Tasa

Signature

Date

Kevin Tasa

Name of Committee Chair

Kellogg-Schulich Executive MBA

Committee

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.

Northwestern

Kellogg

School of Management

LEADING & MANAGING DIVERSE ORGANIZATIONS

MORS 462-5

SYLLABUS

PROFESSOR NICHOLAS A. PEARCE, PH.D.

 **@NAPPHD**

WINTER 2018
SECTION 81



DEPARTMENT OF MANAGEMENT & ORGANIZATIONS (MORS)

MORS 462-5: LEADING & MANAGING DIVERSE ORGANIZATIONS

Winter 2018 (2nd 5 weeks) • Section 81

Wednesday 6:30pm – 9:30pm

Evanston Campus – Global Hub 2420

PROFESSOR:

Nicholas A. Pearce, Ph.D.

 @NAPPHD

+1 (847) 467-3468

n-pearce@kellogg.northwestern.edu

Office hours: Wednesdays 4:30–5:30pm (GH 5181)

TEACHING ASSISTANT:

Anna McKean, Management & Organizations doctoral candidate

anna.mckean@kellogg.northwestern.edu

COURSE OVERVIEW

The **Leading & Managing Diverse Organizations** course will focus on developing the cross-cultural competence you need to lead effectively in the modern collaboration-powered global marketplace – one that is more diverse than ever before on multiple dimensions. This course is designed to provide leaders with evidence-based insights, as well as proven individual, interpersonal, enterprise-level strategies to successfully harness the power of diversity and inclusion in teams, organizations, markets, and societies.

This course considers the rapidly increasing levels of workplace diversity and marketplace globalization as opportunities for individual & organizational growth, and as potential catalysts for game-changing innovation & sustainable competitive advantage – not as problems to be solved. To be successful in the contemporary knowledge economy, leaders must develop the ability to understand, engage, and integrate people of different backgrounds & worldviews – whether in terms of gender, race or ethnicity, age or generation, religion or creed, educational or functional background, or socioeconomic status. Leaders must also learn to build sustainable organizational architectures that leverage diversity, promote inclusion, and enable productive collaboration in these increasingly complex cross-cultural contexts.

In addition to developing greater self-awareness and cross-cultural competence, this course will also build your confidence to more thoughtfully interact in culturally diverse contexts, address the (often subtle) barriers of prejudice that inhibit people's ability to learn, grow, and contribute their highest and best every day, and ultimately, to champion inclusive strategies & practices that will enable you to more fully leverage the diverse talent that exists within and beyond your organization.

COURSE FORMAT & ATTENDANCE POLICY

Each week, we will focus on a different dimension of the cross-cultural competence and organizational intelligence needed to lead & manage diverse organizations in the multicultural marketplace, starting with your personal diversity journey as an individual, scaling up to the level of teams, organizations, markets, and society. This course is built on the philosophy that we learn from one another – consequently, there will be a strong emphasis on actively engaging in self-reflection, discussing assigned readings and real-world scenarios, sharing experiences, and participating in experiential learning exercises.

Discussions regarding sociocultural diversity often address topics that can engender a degree of controversy and disagreement, and challenge group members to stretch beyond their comfort zones. This is normal and should be expected within the context of our course. Your learning and that of your classmates will be enhanced by **your** willingness to honestly share your perspectives & experiences as you also actively listen to those of others. I respect – and expect everyone else to respect – the diversity of viewpoints that you will have to share on these topics. In the end, the success of the class depends on your willingness to thoughtfully, respectfully, and actively engage in these difficult conversations.

Because this course relies so extensively on the consistent active engagement of the entire class, it is absolutely essential that you attend all five class sessions. There is a strict no-miss attendance policy for all sections of MORS 462-5 – missing 20% of the course (one session) is unacceptable. **If you miss one class, the highest grade you can earn in the course is a C; if you miss two classes, you will fail the course.*** Moreover, this course does not offer a pass/fail option, as there is no way to get the true value out of the course unless you fully invest yourself in it – both inside and outside of the classroom.

*Exceptions may be made in truly extreme circumstances, such as a major unexpected health challenge, but only if (1) it is clear that you simply had no other choice than to miss class and (2) you provide clear documentation of the extreme circumstances. In fairness to all, the standard for making an exception is very high.

COURSE MATERIALS

All assigned readings can be found in the study.net course pack or our Canvas course page.

You should come to each class prepared to summarize key points from the readings and to actively contribute to the conversations and experiential exercises. As you complete each reading, ask yourself:

- What is the basic argument in the article? What are the key concepts/principles?
- So what? How does this matter for me as an individual? For my team/organization? For society?
- What are the implications for the kinds of challenges I might face as a leader?

Please note that no audio or visual recordings (including photos or copies) can be made of the class or course materials (including slides) without the permission of the professor. All exercises and their solutions are confidential. Copyrighted materials cannot be circulated, (micro) blogged about, posted, or shared in any form. If you are unsure as to the application of this guidance, please ask me.

EVALUATION

Your performance in this course will be based upon the following four components:

COURSE CONTRIBUTION (15%) – Class will begin each day promptly at the start time – your on-time attendance, full preparedness, and complete engagement are both expected and appreciated by your classmates and your professor. In each session, you should be prepared to discuss the readings and/or case(s), share your ideas, and thoughtfully interpret & engage the insights and issues presented by others.

Your on-time attendance to all class sessions and the consistency & quality of your contributions are vital to everyone's learning experience and will factor in to the evaluation of your performance in this class.

Your contribution to class discussions will be evaluated more by the *quality* of your comments than their *quantity*. Quality discussion comments possess one or more of the following attributes:

- Offer a relevant perspective with clear reasoning & careful analysis.
- Apply the theory and concepts offered in the readings and lectures correctly.
- Advance the discussion forward by building on previous contributions with original insights and/or **powerful, provocative questions** – do not merely restate points already made by others.

DIVERSITY REFLECTION ESSAYS (30%) – An important objective of this class is to bridge the gap between theory and practice. Translating insight into action is not always easy, but is essential for effective leadership. In order to facilitate this, you will be asked to complete three “Diversity Reflection Essays.” These individually-authored essays will be of 1-2 pages in length (12-pt. font size, double-spacing, and 1” margins) and will ask you to reflect on the readings and in-class discussion of the previous week by sharing your key takeaways, “aha” moments, as well as your thoughts on how you can apply these lessons to your own practice of leadership. These short essays will be graded on a check-plus, check, check-minus basis. Outstanding essays will go beyond a simple restatement of the in-class highlights/summary of readings to demonstrate a nuanced synthesis of the ideas and a thoughtful explanation of how they can/will be applied to your life and leadership. An additional benefit of these assignments is that they will help you to reflect upon, internalize, and deepen your understanding of key course concepts and how to apply them as you prepare for your final course deliverables.

Each of the three essays will be **due** via Canvas at the beginning of the following classes:

- Diversity Reflection Essay #1 (*based on Session 1*): **Wednesday, February 21** (Session 2)
- Diversity Reflection Essay #2 (*based on Session 2*): **Wednesday, February 28** (Session 3)
- Diversity Reflection Essay #3 (*based on Session 3*): **Wednesday, March 7** (Session 4)

DIVERSITY & INCLUSION CAPSTONE PROJECT (30%) – This final project will provide an opportunity for you to collaborate with a small team of your classmates to deeply investigate a culturally distinct subgroup within the larger context of American culture – you must select a subgroup that is unrepresented on your team. Using the concepts learned in the course, each team will prepare a report of approximately 10 pages in length introducing us to what we need to know to effectively do business with people in the subculture, including important considerations for employing (e.g. attracting, retaining, and promoting talent within organizations) and collaborating with people in the subculture in a cross-culturally competent manner, as well as penetrating the markets represented by the subculture.

Some ideas for categories that represent subcultures that you might consider (this list is **not** exhaustive):

- Gender: Women, Men
- Race: African-Americans (Blacks), Caucasians (Whites), Latinos, Asians, multiracial people
- Immigrant status (e.g. Green Card, undocumented, full citizen, etc.)
- Sexual orientation: Straight, Gay, Lesbian, Bisexual, or Transgender people
- People who are primarily responsible for the physical & emotional care of one or more dependents
- Religion/creed: Orthodox Jews, evangelical Christians, Muslim, Amish, etc.
- Age/generation: Gen Z (Digital Natives), Gen Y (Millennials), Gen X, Baby Boomers, Traditionalists
- Military veterans
- Disability (including physical, cognitive, mental, sensory, developmental or emotional impairments)
- Many other subcultures not listed above

In your analysis, you might consider addressing some of the following questions (*when applicable*):

- What are some of the demographic shifts on the horizon within this subculture? How might these shifts inform and influence workplace and marketplace diversity & inclusion strategy?
- What are common experiences people from this subculture have doing business within Corporate America/with majority American businesses? Beyond Corporate America?
- What are some of the common stereotypes of people from this subculture? Who holds these stereotypes? How does that impact organizational behavior and business outcomes?
- How would you describe this subculture using the 8 Dimensions of Culture framework? What insights does your assessment give you as someone who might potentially lead/collaborate with individuals from this subculture? What are some of the “dos & don’ts” for collaborating with individuals in this subculture in a cross-culturally competent manner?
- What do individuals from this subculture wish their organizational leaders/managers knew about how to understand, respect, and leverage the difference they bring to the table?
- What should leaders and organizations (both B2B & B2C) do with the insights generated by your team’s analysis? How can they implement some of these ideas within their teams & organizations, as well as with their partners and customers/clients?

This final project is an important exercise to further solidify the lessons learned from the course and lay an important foundation for you beyond the course. **You must first propose a subculture to investigate and have your choice approved by the professor no later than Session 3. Your final paper should be approximately 10 pages in length and is due by class time via Canvas on the day of Session 5 – Wednesday, March 14.** As a part of this course capstone project, you will also be asked to evaluate the performance of each of your group’s members (including yourself). You will find the evaluation form later in this syllabus.

CROSS-CULTURAL COMPETENCE GROWTH PLAN (25%) – This course is predicated on the belief that you can grow in your cross-cultural competence. Throughout the course, I would like you to record growth goals in relationship to the content areas we discuss in class and those covered in your Intercultural Development Inventory (IDI) report. This assignment is comprised of a two-page essay capturing your key takeaways and lessons learned from the class along with a 1-2 page to-do list of actions that you can and will take to make yourself a more culturally-competent collaborator and leader. I would like you to prepare and submit that essay and “to-do” list – your “Cross-Cultural Competence Growth Plan,” prioritized and dated. This means that you should have identified not only what you will do, but also when and how you will do it. This exercise is mostly for you, but it will also help me see how you are converting the course content into a real action plan for your own growth as a leader.

Your Growth Plan is **due** via Canvas **no later than 11:59pm Central Time on Wednesday, March 21.**

CONSIDERATIONS FOR OUR CLASS COMMUNITY

The Kellogg Honor Code and Kellogg Code of Etiquette both fully apply to this course and represent our shared set of community expectations and values to promote the optimal learning environment for everyone in our School (see http://www.kellogg.northwestern.edu/stu_aff/policies/honorcode.htm and http://www.kellogg.northwestern.edu/stu_aff/policies/etiquette.htm). Academic dishonesty on any submitted work will be reported to the Dean’s Office and will result in a failing grade.

Moreover, your fellow classmates and I expect you to:

- Arrive to all class sessions on-time and well-prepared.
- Engage actively and thoughtfully in all class discussions and exercises.

- Not sabotage your colleagues' learning experience by discussing your prior knowledge of any cases/exercises with other students, showing confidential role information to others before/during exercises, and/or not fully engaging in exercises.
- **Not communicate with others (*outside of your section*) regarding your experience with course cases/exercises – this would constitute a Kellogg Honor Code violation.**
- Not borrow/share notes, handouts, cases, or exams from/with people outside of this class.
- Not use recording devices, cameras, computers, tablets, etc. without permission during class.
- **Not use course handouts, exercises, cases, discussion questions, presentation slides, or any other materials used in this class for purposes other than this class without the express written consent of the professor.**

ACCESSIBILITY – Any student requiring accommodations related to a disability or other condition is required to register with AccessibleNU (accessiblenu@northwestern.edu or 847-467-5530) and provide professors with an accommodation notification from AccessibleNU, preferably within the first week of class. All information will remain confidential.

Who Am I?: The Power of Social Identity

Wednesday, February 14

Session 1

Objectives:

- Understand the complex interplay between social identity and self-presentation for leaders
- Learn the historical evolution of the rationale for diversity & inclusion in the USA & globally
- Discuss course objectives, philosophy, format, and evaluation criteria
- Develop individual & collective learning goals for the course

Read:

- *How Diversity Makes Us Smarter* (Phillips, 2014) **C**
- *Fear of Being Different Stifles Talent* (Yoshino & Smith, 2014)
- BONUS READING: *Dear White Boss* (Caver & Livers, 2002)
- BONUS READING: *The Pressure to Cover* (Yoshino, 2006) **C**
- BONUS READING: *Disentangling the Meanings of Diversity and Inclusion* (Roberson, 2004) **C**



C – DENOTES READING AVAILABLE ON CANVAS

Who Are They?: Navigating Cross-Cultural Interactions

Wednesday, February 21

Class 2

DUE: (1) Diversity Reflection Essay #1 & (2) Intercultural Development Inventory (IDI)

Objectives:

- Learn frameworks for comparing & contrasting cultures and diagnosing cultural differences
- Learn how to work more effectively with people from different cultures
- Gain insight into how cross-cultural (in)competence impacts global business

Read:

- *Building Better Global Managers* (Rifkin, 2006)
- *Navigating the Cultural Minefield* (Meyer, 2014)
- *The Intercultural Development Inventory* (Hammer, 2009) **C**
- BONUS READING: *Lost in Translation* (Trompenaars & Woolliams, 2011)



C – DENOTES READING AVAILABLE ON CANVAS

Who Is Us?: The Science of Implicit Bias & Mindful Inclusion

Wednesday, February 28

Class 3

DUE: (1) Diversity Reflection Essay #2 & (2) Complete the [Implicit Association Test \(IAT\)](#)

Objectives:

- Discuss the impact of bias on individuals, teams, and organizations
- Understand the impact of diversity & inclusion in organizations on workplace environment and individual & team performance
- Learn strategies for practicing mindful inclusion in teams and organizations

Read:

- *Buried Prejudice* (Carpenter, 2008) **C**
- *Rethinking Political Correctness* (Ely, Meyerson & Davidson, 2006)
- *The Measuring Sticks of Racial Bias* (Mullainathan, 2015) **C**
- BONUS READING: *Women Rising: The Unseen Barriers* (Ibarra, Ely & Kolb, 2013)
- BONUS READING: *The Teddy-Bear Effect* (Livingston & Pearce, 2009) **C**
- BONUS READING: *Microinequities: When Small Sights Lead to Huge Problems in the Workplace* (Hinton, 2003) **C**



C

– DENOTES READING AVAILABLE ON CANVAS

Diversity & Inclusion as Organizational Strategy

Wednesday, March 7

Class 4

DUE: Diversity Reflection Essay #3

Objectives:

- Learn about the strategic approaches that organizations use to foster workforce diversity & leverage difference as a source of sustainable competitive advantage
- Understand the impact of diversity & inclusion in organizations on firm strategy, organizational performance, and market leadership

Read:

- *Diversity as Strategy* (Thomas, 2004)
- *Making Differences Matter* (Thomas & Ely, 1996)
- BONUS READING: *From Affirmative Action to Affirming Diversity* (Thomas, 1990)
- BONUS READING: *Why Make Diversity So Hard to Achieve?* (Rice, 2012)
- BONUS READING: *Hacking Tech's Diversity Problem* (Williams, 2014)



Where Do We Go From Here?

Wednesday, March 14

Class 5

DUE TODAY: Diversity & Inclusion Capstone Project
DUE ON MARCH 21: Cross-Cultural Competence Growth Plan

Objectives:

- Learn about the impact and future of D&I in organizations from current executives
- Synthesize key learnings from the course & plan action steps for continuing development
- Discuss concrete steps you can take to advance the work of diversity & inclusion in teams, organizations, and society

Read:

- *Great Leaders Who Make the Mix Work* (Groysberg & Connolly, 2013)
- *Voices from the Front Lines* (Minguet et al., 2014)
- *Leadership in Your Midst* (Hewlett et al., 2005)
- BONUS READING: *How Hard Should You Push Diversity?* (Davidson, 2012)
- BONUS READING: *Executive Women and the Myth of Having It All* (Hewlett, 2002)



About Dr. Nicholas Pearce



Dr. Nicholas Pearce serves as an award-winning Clinical Associate Professor of Management & Organizations at the Northwestern University Kellogg School of Management, where he was named MSMS Professor of the Year in 2015. He is also the founder and chief executive officer of The Vocati Group, a global executive advisory consultancy. He is a leading scholar, lecturer, and trusted strategic adviser on values-driven leadership, collaboration, and change in organizations. He has served leaders of corporations, social impact organizations, governments, and communities of faith on six continents, including Abbvie, Advocate Health Care, Allstate Foundation, Aon, Archdiocese of Chicago, Boston Scientific, BP, Capital Group, Chicago Public Schools, Chicago United, Chicago Urban League, Council of State Governments,

Deluxe, DiversityInc, The Episcopal Church, Exelon, FMC, Google, Hearst, JLL, JPMorgan Chase, KIPP Foundation, McDonald's, Monsanto, NASA, Nike, Northwestern Medicine, Novartis, Pentecostal Assemblies of the World, Perkins Coie, Philanthropy Club of Chicago, The PrivateBank, Ronald McDonald House Charities, Surge Institute, Teach for America, USG, U.S. Olympic Committee, Wheaton College, Whirlpool, WomenHeart, Young Presidents' Organization, and ZS Associates.

Dr. Pearce is committed to philanthropy & civic engagement, serving on the boards of Access Community Health Network, the Chicago Children's Museum, and the Chicago Community Trust's African American Legacy Fund. He has been a Fellow of Leadership Greater Chicago since 2015 and has also been named one of Chicago's *40 Game Changers (under 40)* by WVON/Ariel Investments, a Galbraith Scholar by Harvard University's Kennedy School of Government, and a Public Voices Faculty Fellow by The OpEd Project. He has been honored for excellence and promise as a leader and scholar by several organizations, including the Coca-Cola Scholars Foundation, Congressional Black Caucus Foundation, Mustard Seed Foundation, National Black MBA Association, and Union League Club of Chicago. He and his work have been featured in global media outlets including *Bloomberg Businessweek*, *Chicago Tribune*, *CNBC.com*, *Fast Company*, *Forbes*, *Fortune*, *The Huffington Post*, *The Los Angeles Times*, *Marketplace*, *MSNBC*, *The New York Times*, *Newsweek*, *Strategy+Business*, *Time*, *Univision*, *UrbanFaith.com*, and *The Washington Post*.

Dr. Pearce currently serves as Assistant Pastor of Chicago's historic Apostolic Church of God, where he is responsible for overseeing the spiritual education and discipleship of Apostolic's 18,000-member congregation. He is an internationally sought-after speaker, and is emerging as one of his generation's most trusted and influential voices, with a ministry that has already impacted tens of thousands of lives across cultural, generational, and denominational boundaries.

Dr. Pearce holds the Ph.D. in Management & Organizations from Northwestern University's Kellogg School of Management and the S.B. in Chemical Engineering & Management from the Massachusetts Institute of Technology, with a concentration in Religious Studies earned in conjunction with Harvard Divinity School. A Chicago native, Dr. Pearce currently resides in his hometown with his family.

TEAM EVALUATION

Please use this form to evaluate all of the members of your team, **including yourself**, based on your Diversity & Inclusion Capstone Project and any other group work done together throughout this course.

Evaluate each person on (1) the quality of his/her contribution(s), (2) their dependability/reliability, and (3) the extent to which they demonstrated leadership/initiative using the *comparative* scale below.

Please submit this group evaluation via Canvas no later than the due date of your final project.

Do not forget to include yourself!

SCORE	QUALITATIVE DESCRIPTION
-1	Efforts were clearly not up to par with the other team members
-0.5	Efforts were somewhat less substantial than most of the other team members
0	Efforts were about equal to most of the other team members
+0.5	Efforts were somewhat more substantial than most of the other team members
+1	Efforts were exceptionally above & beyond the other team members

Team Member Name	Quality of Contribution	Dependability	Leadership

Course Change Proposal – Family Enterprises: Success and Continuity

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

Kellogg-Schulich Executive MBA Program

2. Course Number and Credit Value

EMBA 6890 4.00

3. Course Title

a) Long Course Title

Family Enterprises: Success and Continuity

b) Short Course Title

Family Enterprises

4. Existing Pre-requisites/Co-Requisites

N/A

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

<input type="checkbox"/>	in course number
<input checked="" 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 type="checkbox"/>	other (please specify)

6. Effective Session of Proposed Change(s)

Winter 2023

7. Academic Rationale

The decrease from 4 to 2 credits is justified by a reduction in the scope of the course, the number of sessions and the corresponding readings and assignments.

8. Proposed Course Information

Existing Course Information (Change from)	Proposed Course Information (Change to)
<i>Course Credits: 4</i>	<i>Course Credits: 2</i>

9. Consultation
N/A

Originator

Justin Craig _____
Signature Date

Justin Craig _____
Name Area or Specialization

Approvals:

Area or Specialization

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

Matthias Kipping _____
Signature Date

Matthias Kipping _____
Name Kellogg-Schulich Executive MBA
Area or Specialization

Degree Program

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

Matthias Kipping _____
Signature Date

Matthias Kipping _____
Name of Program Director Kellogg-Schulich Executive MBA
Program

Program Committee

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

Kevin Tasa
Signature

Nov. 22, 2022
Date

Kevin Tasa
Name of Committee Chair

Kellogg-Schulich Executive MBA
Committee

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.

COURSE SYLLABUS

Assigned Text: *Leading a Family Business: Best Practices for Long-Term Stewardship*. Justin Craig & Ken Moores, Praeger Publishing, 2017.

Please complete the [course survey](#) on our class website (CANVAS) due by **Friday, April 6, 2018**.

Session #1: Family Business: The Same as Any Other Business Except...

Thursday, April 12, 2018 (8:30 am-11:45 am)

Topics, Reading Assignments, and Case Study [Please complete these readings prior to Session 1.]

- Introduction.** Craig & Moores: Chapter 1, pp. 1-10.
 - **Three Circles Model and Continuity Planning.** Craig & Moores: Figure 1.1, p. 6.
- Learning Leadership Roles.** Craig and Moores: Chapter 6, pp. 11-26.
 - **Learning Family Business (4Ls Framework).** Craig & Moores: Figure 6.1, p. 72.
- Dempsey Case.** Craig and Moores: Appendix, pp. 147-166.

Supplemental Readings (optional):

- “**Thomas Mann’s Buddenbrooks**” Ward and Zsolnay, Kellogg case 7-404-750, 2009, p. 1-9.
- “**The Dynamics of Family Controlled Firms**” by Manfred Kets de Vries, 1996, Organizational Dynamics, p. 59-71.

Session #2: Structures and Systems Overview

Friday, April 13, 2018 (8:30 am-11:45 am)

Topics, Reading Assignments, and Case Study [Prepare to discuss case in-class]

- Architecture.** Craig & Moores: Chapter 2, pp. 11-26.
- The Architect.** Craig & Moores: Chapter 8, pp. 101-110.
- Lee Kum Kee Case: “How to Motivate the 5th Generation? Balancing Engagement and Entitlement at Lee Kum Kee”** John L. Ward, Kellogg, case #5-214-251, 2016, 21 pp.

Required Reading:

- “**Tests of a Prince**” by I. Lansberg, HBR, Sept. 2007, p. 1-9.

Supplemental Readings (optional):

- “**Leveraging the Mission in Family Business**” by D. Miller and I. Le Breton-Miller, *HBR Working Knowledge*, 2005, 5 pages.
-

Session #3: Business and Family Governance

Saturday, April 14, 2018 (8:30 am-11:45 am)

Topics, Reading Assignments, and Case Study

- Governance.** Craig & Moores: Chapter 3, pp. 27-42.
 - The Governor.** Craig & Moores: Chapter 9, pp. 111-128.
 - Bush Brothers Case: The Future of Bush Brothers and Company: Developing a Shared Vision for a Complex Family Enterprise**” I. Lansberg, *Kellogg*, case #5-414-754, 2016, 20 pp.
-

Session #4: Continuing Differently Jim Ethier (Chairman Emeritus of Bush Brothers and Kellogg Adjunct Professor) will jointly deliver this session.

Sunday, April 15, 2018 (8:30 am-11:45 am)

Topics and Reading Assignments

- Entrepreneurship.** Craig & Moores: Chapter 4, pp. 43-54.
 - The Entrepreneur.** Craig & Moores: Chapter 10, pp. 129-140.
-

Session #5: Family and Business Stewardship

Monday, April 16, 2018 (8:30 am-11:45 am)

Topics, Reading Assignments, and Case Study

- Stewardship,** Craig & Moores: Chapter 5, pp. 55-70.
 - The Steward,** Craig & Moores: Chapter 7, pp. 87-100.
 - Herschend Family Case: Herschend Enterprises: The Quest to be “Family-held Forever”.**
-

Additional Course Readings/Resources

- ["What It Takes for a Family Business to Innovate."](#) J.B. Craig, [Kellogg Insight](#), May 2016, 1 p.
- "Family Companies: Relative Success" [Economist](#), Nov. 2014, p. 12-13.
- "Family Firms: Business in the Blood" [Economist](#), Nov. 2014, p. 59-60, 63.
- "Joining the Family Business: An Emerging Opportunity for Investors" A. Bjornberg, et.al., [McKinsey on Investing](#), Summer 2015, 5 p.
- "Family Businesses" T. Gjelten, Chpt. 20, [Bacardi and the Long Fight for Cuba](#), 2009, 9 pp.
- "Governance for Family Businesses: Sustaining the 'Magic' for Years to Come" C. Egloff & V. Bhalla, [BCG Perspectives](#), Oct. 20, 2014, 5 pp.
- "The Invisible Organization" [2007 Family Business Invitational Conference](#), Kellogg School of Management, May 2007, pp. 45-61.
- "Grandfather" Chapter 1 (excerpts), "Childhood" Chapter 3 and "Brotherly Conflicts" Chapter 23, [David Rockefeller: Memoirs](#), 2002, pp. i, 3, 33-38 and 336-355.
- "Five Steps to Better Family Negotiations" J.A. Davis and D. Malhotra, [Working Knowledge for Business Leaders](#), Harvard Business School, Jul. 9, 2007, pp. 1-4.

GRADED ASSIGNMENT: FINAL PAPER

Please write a case study of your family's business -- about 5-9 pages. Include as exhibits a family tree and the company organizational chart -- including the ownership structure and makeup of the board. Please make sure that you identify the key issues for the future, propose an action plan for addressing the most important one or two issues, and effectively apply course concepts and readings. Ensure you reference readings and frameworks that were introduced in the class.

Assignment Deadline: **Please upload your paper onto the course electronic website (Canvas) by Monday, May 21, 2018, 11:59 pm CDT.**

COURSE EVALUATION

Course assessment is based on 50% for class participation and 50% for the graded paper.

COURSE CODE OF CONDUCT

The course embraces the Kellogg Honor Code. In addition, a code of confidentiality is expected for the benefit of sharing of personal experience.

Please see our website for additional publications.

- www.kcfe.net

Non-Voting Members of Faculty Council Present:

M. Cernea	A. Ferreira	C. Niederwanger	F. Zandi	Guests
M. Collyer	B. Kha	C. Sullivan	C. Zhuang	C. McAulay
S. Calahan	L. Lakats	N. Sutherland		
C. Carder	N. Machado (guest)	S. Tenn		
J. Fayt	Y. Massop	D. Woticky		

Non-Voting Members of Faculty Council Absent:

N. Alexandrian	A. Fisher	J. Mapa	S. Pulver	
W. Al-Hussaini	S. Friedman	R. Mayer	E. Roman (Ex in Res)	
S. Babra	B. Gallagher	T. Medcof	R. Ross (Ex in Res)	
D. Barret	A. Garber	G. Milavsky	C. Sachs	
P. Barter	L. Ginsberg	J. Morgan	V. Shanmuganathan	W. Craddock
S. Browne	T. Gosse	M. Morriello	C. Sicoli	A. Gravel
J-M. Clark	P. Grant	R. Moy	S. Sigel (Ex in Res)	L. Jackson
M. Collyer	A. Harris	K.R. Na	H. Sinker	J. Jeyakumaran
M. De Luca	M. Hastings	A. Narbe	C. Sullivan	D. Mak
L. De Wilde	C. Hui	Z. Necas	T. Stubbs	E. Maizel
G. Deans	G. Klar	B. Pasquali	A. Thomson	E. Vanderheyden
P. Dillon	A. Konson	L. Pan	T. Tolia	N. Verma
K. Elliot	H. Koren-Cohen	C. Partland	H. Turesson	
K. Ellis	D. Lennox	G. Pau	K. Vandezande	
D. Elsner	R. Lynn	J. Pinto	A. Visram	
E. Farrell	P. Macdonald	P. Pivato	A. Welsh	
		J. Pokrajac	R. Young	

1. Welcome and Chair's Remarks (5 minutes)

Chair calls the meeting to order at 10:34 am. Reads the Land Acknowledgement.

2. Dean's Remarks (5 minutes)

Thanks to the ADA team, Giri, Murat, Ashwin for ushering the MBAt proposal going to Senate on December 15. Thanks to Pauline and Minerva who created an exciting initiative- signed an MOU with CFA, organizations committed to taking lots of our students for internships and opportunities. To come in for recruiting events and panel sessions going forward.

3. PhD/GBC/UBS Updates (10 minutes)

No updates from the student associations due to final exams.

4. Major Modification to the Master of Marketing (G. Packard) (10 minutes)

G. Packard moves the motion. Seconded by M. Cernea.

After 3 years of successful operating of the MMKG, we decided to do a holistic review of the program—including focus groups with students, faculty and instructors, and external partners. Typically diverse student body in the program—differently positioned to be successful in the program (ragged input). Another challenge around implementing sustainable experiential education opportunities. To level the playing field, there is a proposed change to the admissions requirements to encourage non-standard applicants to have at least one year of work experience. Shifting to start in the summer term to be aligned with other one-year master programs at Schulich. This gives students an extra term of lead time before they start competing/interviewing for internships and other opportunities. Replacing second term field project which typically relied on small companies and entrepreneurs which were not always well positioned to implement student recommendations. Replaced field project with a placement course and the EE Office's professional development hives. Reduce core credit from 42 to 36 to be more competitive with closest comparators in the sector.

Discussion:

L.Hillcoat- we sometimes struggle to recruit for programs with a summer start. Could be a challenge for prospective Master of Marketing students who we would typically see at fairs in the fall. How will we balance this issue with the need to continuing improvement for program quality. Visa processing times are also long; we currently have deferrals for winter intakes.

G.Packard: 90 students per year, about 500 applications per year. Timing issue. If the recruiting cycle aligns more to fall/winter schedule, we need to figure this out tactically. Does it mean we have to go a year ahead to India if we anticipate that international students will be less present at fairs and events. How do we adapt to that potential loss- are there other approaches or strategies? Given that half of our one-year programs are moving to this timeline, should we establish a task force to understand the impact of this change?

A.Devine: Are all the core credits exclusive or any shared with MBAs? How is enrolment managed—is it equal access for both programs?

G. Packard: there are four MBA courses that are in the elective pool. Two exclusive master of marketing sections for all shared core courses. In terms of enrolment management, we also survey the MMKG students every year.

A.Joshi- to Lindsay's comments, can we treat this as an empirical issue and see how this change goes? Commit to monitoring it.

L.Hillcoat- I just checked and we're down 30 percent in applications. And the proposed changes are a negative change to applications.

The Chair closes the speakers list and calls the question. Motion moved with removal of point 2 from the original motion as presented- friendly amendment.

Motion carries.

5. Minor Modification to Organizational Studies PhD field (R. Shao) (10 minutes)

R. Shao moves the motion. Seconded by L.Zhu.

1. OT doctoral seminar will be encouraged but not compulsory.
2. Summer research paper after first year will be a requirement.

Discussion:

M.Valente: I still think we need to fill the gap in OT. We shouldn't consider the removal of the requirement a solution to the changing identity of the area. OT is still an important area in management education.

W.Sheremata: echo Mike's concern. I defer to ORGS—you know how you want to develop your PhD program.

The Chair calls the question. Motion carries.

6. University Budget Consultation (L. Philipps & C. McAulay) (50 minutes)

L. Philipps starts presentation at 11:05 am. See slide presentation on Faculty Council tab of Teaching and Learning site for details.

L. Philipps There hasn't been even an inflationary increase in the provincial transfer amount to institutions. Visa processing is slow- we're impacted by this. I know Schulich is one of the Faculties most affected by this.

I want to save time for discussion as much as possible. I encourage people to look at slide deck presentation for additional information.

To continued net increase in faculty complement renewal. Achieved major strides in diversifying faculty complement. Major investment in student financial aid- both domestic and international. Not just quantity but also quality so that York's strategy is more competitive within the sector. Enhanced efforts around decolonization, indigenization, equity, diversity, and inclusion. Enhancing capacity- new equity officers and new division of equity, people, and culture.

Heavily funded by the university fund- infrastructure investments and deferred maintenance to fix and replace older facilities on campus. Washrooms, classrooms, residence. Lots of things behind the walls to ensure health and safety.

Markham Campus- we're pouring the top floor of the building, so on track to open in time for fall 2024.

Revised SHARP model- this is the year we're implementing 2.0. Increasing contribution of revenue generators (Continuing Studies) into the University Fund. In the spring, when we see how things are working out for faculties- we'll see whether that increase (to 8%) is sustainable. Need to support faculties that need operational support because of big negative carry-forwards. AMPD, EUC, and Glendon. Business plan for recovery and sustainability going forward. Tuition fees are not always well aligned to the cost of delivering different programs.

C. McAulay: Draw attention to highlighted numbers in the slide deck. Budgets for the operating fund- day-to-day operating. Budget for ancillary services separately. We ask the Board to approve a three year budget but focus mostly on the year to come. Set aside large contingencies in the last few years not knowing what effect the pandemic would have longer time- those were largely not needed and have combined with surpluses around line items related to travel, hospitality, events to produce large carry-forwards in some units and faculties.

A major cost is compensation- a recent turnover of Bill 124 may impact our assumptions about budgeting and carry-forwards. Could also have a retroactive impact, as well.

Some of the large contingencies in 2020 for pandemic impact on enrolment have been needed to some degree this year, at least based on what we've seen in the fall term. There has been some variation in domestic enrolments, but we've seen a larger difference in terms of international students.

Discussion:

C.Graham: plan for Faculty budget was to run down the surplus by more than what we actually did.

L.Philipps: one source of surplus is often failed searches, turnover in staff roles, vacancies.

C.McAulay: on the salary line, to the extent we would be hiring casual staff to replace staff on leave or vacation, casual staff needs were less during remote work. Facilities staffing needs were also reduced while campus was shut down.

Member on Zoom: to what extent should we expect to see some money back for infrastructure improvements to classrooms, teaching technology?

C.McAulay: there are less obvious costs that the university fund supports such as plumbing and electrical, fire safety. Any building that predates SHARP is in a common group of shared costs. Newer buildings such as McKewen needs to have their own deferred maintenance budgets set aside for future costs.

A member asks a question about the funding of the new building for Continuing Studies.

C. McAulay: there is some internal borrowing, but no University Fund money was used for that build.

T.Peridis asks about how the different aspirations reconcile with each other- Markham, Vaughan Health Precinct, Continuing Studies building.

C.McAulay: the numbers I'm showing are the approved budget. For the next budget, we will have to re-test assumptions. We have capital projects that we want to be shovel ready so that if/when approved, we can break ground while the current government is still in power, but those capital projects on the slide are not yet approved by the Board to begin.

A member asks a question about plans to prioritize deferred upgrades to teaching spaces and infrastructure, classroom technology.

L.Philipps: We've put our LMS into the cloud which has helped us make it more efficient. Hyflex kits for classrooms. There's anxiety about the direction of improving these spaces without a clear understanding of changes to anticipate in terms of in-person versus other delivery modes. What spaces will we need? It will be an iterative process and we want to hear from all faculties about their needs for the future of learning and pedagogy. We will need to be able to keep up with technological changes.

The Chair closes the speakers list to accommodate returning to the previous agenda item before the end of the

meeting.

L.Hillcoat: in some cases we're double paying because we pay into central services but then pay to provide a more tailored service within the Faculty when our needs are not met centrally. Is there a plan to adopt or explore a use-based model for SHARP?

L.Philipps: there's no plan for that now. It's in Schulich's best interest that the central services are properly funded and supported so that York does well.

D.Zwick: One thing I'm concerned about the increased payment from the Faculty to the University Fund is our ability to fund our strategic projects. The pressure to fund change initiatives is increasing, but they're not funded and we don't have the ability to fund everything ourselves. On the undergraduate side, the revisioning of enrolment will help. From our perspective, the area we're underfunded in is the undergraduate tuition. Could we get the government to open a conversation about opening to the market level.

7. Other Business

None.

8. Adjournment

Motion to adjourn- A. Joshi. Chair adjourns meeting at 12 pm.

EXECUTIVE COMMITTEE SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Executive Committee of Faculty Council for the 2022-23 academic year was held remotely (via Zoom) on Friday, November 25 at 11:30 am.

Minutes

1. Welcome & Chair's Remarks

The Chair calls meeting to order at 11:32 am. Confirms quorum. Offers overview of items as proposed in the draft agenda for Faculty Council.

2. Review of November Faculty Council Agenda and Documentation

The Chair introduces discussion of the presentation items on the FC agenda.

G.Packard provides overview of proposed changes and proposal development process for the Master of Marketing Major Modification proposal. Explains the edits to the proposal following review at MPC based on recommendations from SSIR. Changes are based on information and experience gathered from running the program for three years. Changing the sequencing to prioritize the development of the skills academic colleagues believe are core to the program.

M.Kipping expresses support for the proposal, especially core credit reduction. Will the removal of the opportunity for students to implement a project deter applicants because of how valuable the real-world experiences are to prospective students now? G. Packard explains that the simulation course will preserve some of the experiential learning in the program.

E.Tabatabaei asks if it would be more valuable to prioritize relevant work experience as an admission requirement, rather than keeping it broad. G. Packard delineates a few different common applicant profiles to the program—some with very novel professional backgrounds and they succeed overwhelmingly if they have any work experience that demonstrates they understand the conventions and demands of working on a team and/or as part of an organization.

M.Cao asks about the current composition of the program's student body re: proportion of domestic and international students. G. Packard states that this year, the program is about 55% international students and 45% domestic. Last year, about 50/50.

M.Cao asks about the timing of the internships and shares insight about timing the internship within the Master of Finance.

S.Trivedi asks if there is a difference in graduation time of students who take the internship and those who don't? G. Packard: no. Graduate placement replaces an elective course. Some consideration given to visa extension issue for international students.

The Chair closes the discussion of the Master of Management proposal and asks the proponent of the Minor Change to the PhD in Organizational Studies proposal, R.Shao, to summarize the proposed changes.

R.Shao elaborates on the synopsis and brief rationale from the proposal documents. Members ask about the addition of the summer research paper as a requirement. R.Shao explains that the summer paper does not have to be empirical in nature. The timing is at the end of the first year, so there is flexibility in terms of the scope.

M.Kipping asks why the specialization is not renamed Organizational Behaviour. K.Tasa explains that the area name was changed to Organizational Studies from Organizational Behaviour and Industrial Relations; the name change was aspirational.

T. Noseworthy comments that the students are totally different now than they were before. It's much more experimental than it was before. Some students seem confused about the program identity. R.Shao: we will consider the suggestion.

Chair asks if anything on the consent agenda needs to be placed on the regular agenda. No requests are made.

3. Other Business

None.

4. Adjournment

D.Johnston moves to adjourn. The Chair adjourns the meeting.