FACULTY COUNCIL
SCHULICH SCHOOL OF BUSINESS

AGENDA (by e-vote)

1. Motion to approve the transfer of summer authority from Schulich Faculty Council to the Executive Committee (m: A.Joshi | s: K. Tasa)
2. Motion to approve the consent agenda items as listed below. (m: A.Joshi | s: K. Tasa)

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.

The Senate of York University

Synopsis

The 695th Meeting of Senate held on Thursday, 27 April 2023 via zoom

Remarks

The Chair of Senate, Professor Poonam Puri, welcomed Senators to the meeting.

Consent Agenda items deemed to be approved as no requests were received to move any of the items to the regular business.

Inquiries and Communications

There were none.

Reports

Under President's items, President Lenton spoke to the following:

- The higher education sector is being disrupted by a number of factors, including globalization, pandemic, etc., with which is resulting in a negative impact on enrolments at post-secondary institutions, including specifically international enrollments at York.

- The provincial government has frozen tuition fees for the 2023-2024 academic year, with no additional funding for institutions announced. Enrolment shortfalls will have a significant budgetary impact for the coming year at York. Between now and June, Faculties are focused on converting applications to enrolments and increasing revenue, while trying to slow down expenditures at the same time.

- The three-year operating budget will be presented to the Board of Governors for approval in May or June.

- Congratulations were extended to the outstanding researchers recognized recently at the President's Research Awards ceremony.

- York's strategy on sustainability is receiving positive media attention.

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

Approvals

Senate approved the recommendation of its Executive Committee to:

- approve the membership of Senate for the period 1 July 2023 - 30 June 2024 with a maximum of 169 and distribution as set out below, with the School of Arts,

The Senate of York University Synopsis

Media, Performance & Design, the Faculty of Liberal Arts & Professional Studies, the Lassonde School of Engineering and the Faculty of Science, as the anchor Faculties for Markham campus programming, encouraged to consider for the 2023-2024 interim year allocating one of their Faculty seats to be filled by a faculty member who will be based at the Markham campus.

Senate approved the following recommendations of its Academic Standards, Curriculum and Pedagogy Committee, all effective FW 2023-2024:

- closure of the Certificat en rédaction professionelle, housed in the French Studies Department, Glendon
- establishment of a Jewish Studies Certificate, to be housed in the Department of Humanities, Faculty of Liberal Arts and Professional Studies
- establishment of a Cross Disciplinary Certificate in Children's Literature, to be housed in the Department of Humanities, Faculty of Liberal Arts and Professional Studies
- establishment of a new Specialization in Construction Law in the Professional LLM program, Osgoode
- minor changes in the BBA and iBBA degree programs housed in the Schulich School of Business
- minor changes to degree requirements for the PhD degree program in Law, Osgoode

Committee Information Reports

Executive Committee

Information items included the following:

- the annual call for service on Senate Committees has been released and is on the Senate website. Senators are encouraged to self-nominate and to encourage colleagues to submit their interest in participating in a Senate Committee.

Academic Policy, Planning and Research Committee (APPRC)

The Chair of APPRC facilitated a discussion at the meeting, on the *School of Medicine: Planning Prospectus*, included in the agenda package.

An update on the academic planning for the Markham Campus was provided.

Academic Standards, Curriculum and Pedagogy Committee (ASCP)

The Chair of ASCP reported that the Committee received a draft report, from the AVP Teaching and Learning, on *Common Language for Modes of Learning*. The AVP T&L will share the document with community members for feedback.

The Senate of York University Synopsis

APPRC and ASCP Joint Sub-Committee on Quality Assurance

APPRC and ASCP conveyed:

- a report from the Joint Sub-Committee on Quality Assurance which included Final Assessment Reports for completed Cyclical Program Reviews and covered other matters

- an update on the Taskforce on the Future of Pedagogy

Senate Committee on Awards

The Chair of SCA transmitted the Committee's report and congratulated the recipients of the 2023 President's Research Awards:

President's Research Excellence Award
Linda Peake, Faculty of Environmental and Urban Change

President's Research Impact Award
Karen Burke, School of Arts, Media, Performance & Design

President's Emerging Research Leadership Award
Jude Kong, Faculty of Science
Taien Ng-Chan, School of Arts, Media, Performance & Design

Additional Information about this Meeting

Please refer to the full Senate agenda and supplementary material [posted online](#) with the **27 April 2023** meeting for details about these items.

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

May Meeting of Senate

Senate's next meeting will be held at **3:00 pm on Thursday, 25 May 2023.**

SCHULICH SCHOOL OF BUSINESS
EXECUTIVE COMMITTEE

The following meeting dates are proposed for the Executive Committee and Faculty Council in the 2023-2024 year. All meetings will begin at 11:30am.

Executive Committee	Faculty Council
Friday, September 15, 2023	October 6, 2023
Friday, October 20, 2023	Friday, November 3, 2023
Friday, November 24, 2023	Friday, December 8, 2023
Friday, January 19, 2024	Friday, February 2, 2024
Friday, February 23, 2024	Friday, March 8, 2024
Friday, April 5, 2024	Friday, April 19, 2024
Friday, May 24, 2024	Friday, June 7, 2024

SCHULICH SCHOOL OF BUSINESS
Master Programs Committee

The following meeting dates are proposed for the Master Programs Committee
in the 2023-2024 year. All meetings will begin at 11:30am.

Master Programs Committee Meeting Dates
Thursday, September 7, 2023
Thursday, October 12, 2023
Thursday, November 16, 2023
Thursday, January 11, 2024
Thursday, February 15, 2024
Thursday, March 28, 2024
Thursday, May 16, 2024

Closure of an Undergraduate or Graduate Program

I.   Program Information

Name and Type of Program	International Bachelor in Business Administration, Undergraduate Program
Home Academic Unit	Schulich School of Business
Year Program Established	2000

II.   Enrolment Data

Insert in the table below the enrolments in the program the past three academic years.

2019/2020	100
2020/2021	75
2021/2022	55
2022/2023	46

III.   Reasons and Impact

1.   Provide the rationale for the closure of the program.

The International Bachelor of Business Administration (iBBA) program was established at a time when international business was perceived as a distinct topic of study from a regular business degree, which, in our case, is our Bachelor of Business Administration (BBA). Over time, iBBA's distinction from the regular BBA began to wane as the topic of international business became more integrated into business programs as a result of the reality that business has become a global field. On top of this, because the iBBA is more constrained in curriculum requirements, students were feeling disadvantaged relative to their BBA peers. Finally, and relatedly, applications to the iBBA program have been on a steady decline for the last several years so much so that we decided recently to reduce intake into the program from 110 students to 55 students. The above table details from the Integrated Academic Program Report of the decline in intake to the iBBA program starting from 2018-19

This all said, our goal is not to remove international business as a focus of study from Schulich but instead to integrate it into the existing BBA program. The end result is that we will move toward one undergraduate degree program – the BBA – and give all Schulich undergraduate students the option of completing a new, leading-edge specialization in International Business that will contain many of the key benefits of the iBBA. This will give students more freedom of choice and more flexibility when it comes to designing their career paths. Thus, the goal is to restructure how international business is pursued at Schulich from a separate program to a stream of study as part of our traditional business degree.

2. Comment on the alignment between the closure and Faculty and/or University academic plans.

The general spirit embedded in the above rationale is to provide all students with the opportunity to pursue a degree with a focus on international business. This is very much in line with two university priorities: **21st Century Learning** and **From Access to Success**. The closure of the program and the integration of international business in the BBA program strengthens our partnership with our 70 partner schools around the world because all BBA students will have the opportunity to pursue an international business focus. What is more, the into the BBA program may provide incentive to further partnerships with other business schools around the world. This is in line with the university's **Work in Partnership** priority. Finally, making international business a key part of the entire undergraduate program at Schulich is in line with the university's efforts to **Advance Global Engagement** as Schulich students will have a greater aptitude to understand how global cooperation leads to positive change.

3. **Does the closure affect other programs / units? If yes, describe the impact of the closure on them.**

Wide consultation took place at Schulich with other programs, student bodies and functional departments. Extensive discussion about the decline in demand and the need to formally close the program were engaged at the school's BBA/iBBA Committee—Schulich's collegial governance body for decision-making about all aspects of curriculum and programming at the undergraduate level. The BBA Committee is comprised of representatives from across disciplinary areas within the school as well as elected undergraduate student representatives and administrative service units such as Student Services and International Relations, the Office of the Associate Dean, Academic, and the Centre for Career Design.

When considering the impact on York faculties, the iBBA program is small thus the impact of program closure is not significant. That said, because iBBA students were required to study a language as part of their degree, the program closure could impact the Languages, Linguistics and Literatures (LLL) faculty and the French Studies faculty at York. The latter is identified because up to 50% of our iBBA students chose French as their language of study. After informing these faculties of our intentions, they indicated that the program closure would not have a material impact on their operations.

As part of their degree requirements, iBBA students are also required to take elective courses that focus on a particular geographic region (called regional focused courses). Students choose 12 credits from a pool of 180 courses across several York faculties. Because of the small program size and the large pool of electives, we do not anticipate a material impact of the program closure on these faculties. That said, as indicated above, our intention of bringing the international

business stream into the BBA program will include requiring students to take these regional focused courses.

Finally, because of the exclusive nature of the iBBA program, no non-Schulich students were permitted to take courses in the iBBA program.

4. **Are there courses that were established specifically to support the learning outcomes of the program? If so, describe the status of those courses after the closure of the program.**

Below is the list of courses that were designed specifically to achieve learning outcomes of the iBBA program:

INTL 1200 3.0 0 - Microeconomics for Managers
INTL 1210 3.0 0 - Macroeconomics for Managers
INTL 1400 3.00 – Responsible Business in an International Context
INTL 2200 3.00 - International Economics
INTL 2300 3.00 – Organizational Behaviour Across Cultures
INTL 3000 3.00 – Strategic Management for International Business
INTL 4300 3.00 – International Business Simulation

These courses will be retired.

5. **Describe the impact of the closure on students currently enrolled in the program, including an outline of the provisions for students to complete it, the timelines and availability to transfer credits to other programs.**

Students who are currently in the first year of the iBBA program will continue to pursue the degree over the next four years and will graduate with an iBBA degree, just as they had originally planned to do when they enrolled in the program. iBBA students who are currently in their second or third years will also be able to continue in the program to complete their degree. In other words, all courses in the iBBA program will continue to run until the 2022/2023 cohort of students have completed the program. But no new students will be admitted for the 2023/2024 academic year and going forward. This means that the program will be officially closed by the fall of 2026.

6. **What is the impact on faculty members affiliated with the program?**

The impact of the program closure on faculty will be minimal. As mentioned, while we will not be enrolling students into the iBBA program, we will increase the enrollment of BBA students to an equivalent amount to what would have been enrolled in the iBBA program. This means that the faculty resources used for the iBBA program will likely be transitioned to accommodate the increased enrollment in the BBA program.

7. **What are the general implications for the diversity and availability of academic programming?**

   Recall that the primary reason to close this program is less about the relevance of the field of study but more about how it was structured (i.e. a separate program versus integrated as a stream within the BBA). Because all Schulich students are exposed to international business as a natural part of their business degree, it makes more sense to offer international business as a field of study through a specialization or certificate where BBA students elect to pursue deeper study in the field of international business in the same way that they elect to pursue deeper study in other fields like accounting, finance and marketing. Put another way, our core undergraduate program (the BBA) will increase in diversity by absorbing the elements of the iBBA as a retired program and allowing all students to pursue a focus on international business rather than an exclusive few.

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
Schulich iBBA Program

2. Responsible Unit:
Economics

3. Subject Code (Rubric) and Course Number:
INTL 1200

4. Credit Value:
3.00

5. **Long Course Title:** *Microeconomics for Managers*

6. **Short Course Title:** *Microeconomics for Managers*

7. Type of Course Change(s) (indicate all that apply):

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

8. Effective Term/Calendar Year of Proposed Change(s):
Fall 2026

V. July 2021

9. **Rationale:**

This course is a core course in the iBBA program. The iBBA program is scheduled to be officially closed in the fall of 2026. With the program closure, this course will no longer be required.

10.Proposed Course Information:
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

11. Enrolment Notes:
Not Applicable

12. Consultation:
 Consultations with the Economics Area Chair

Existing Course Information (Change From):	Proposed Course Information (Change To):
Existing Long Course Title: Microeconomics for Managers Short Course Title: Microeconomics for Managers Calendar Description: This core course provides students with analytical tools useful for dealing with microeconomics from a manager's perspective. The course focuses explicitly on the application of economic concepts and theories, including market behaviour, price determination, and theories of competition. Note: Not open to BBA students for credit. Not available to exchange students visiting Schulich. Course Credit Exclusion: AP/ECON 1000 3.00.	

Originator:

Mike Valente	April 22, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

Approvals:

Area or Specialization

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

Irene Henriques	April 22, 2023
Signature	Date

Irene Henriques	Economics
Name	Area or Specialization

Degree Program:

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Programs
Name of Program Director	Program

Program Committee:

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

V. July 2021

Mike Valente

Signature

April 28, 2023

Date

Mike Valente

Name of Committee Chair

BBA/iBBA Program Committee

Committee

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
Schulich iBBA Program

2. Responsible Unit:
Economics

3. Subject Code (Rubric) and Course Number:
INTL 1210

4. Credit Value:
3.00

5. **Long Course Title:** *Macroeconomics for Managers*

6. **Short Course Title:** *Macroeconomics for Managers*

7. Type of Course Change(s) (indicate all that apply):

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

8. Effective Term/Calendar Year of Proposed Change(s):
Fall 2026

9. **Rationale:**

This course is a core course in the iBBA program. The iBBA program is scheduled to be officially closed in the fall of 2026. With the program closure, this course will no longer be required.

10. Proposed Course Information:
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

11. Enrolment Notes:
Not Applicable

12. Consultation:
Consultations with the Economics Area Chair

Existing Course Information (Change From):	Proposed Course Information (Change To):
Existing Long Course Title: International Economics Short Course Title: International Economics Calendar Description: This core course provides students with an overview of the aggregative performance of the economy with emphasis on policy application and implications for business. Topics discussed include the determination of key macroeconomic variables such as real GDP, the inflation rate, the unemployment rate, interest rates, and the effect of governments' monetary and fiscal policies. Note: Not open to BBA students for credit. Not available to exchange students visiting Schulich. Course Credit Exclusion: AP/ECON 1010 3.00.	

Originator:

Mike Valente	April 22, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

Approvals:

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

Irene Henriques	April 22, 2023
Signature	Date

Irene Henriques	Economics
Name	Area or Specialization

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Programs
Name of Program Director	Program

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

V. July 2021

Mike Valente

Signature

April 28, 2023

Date

Mike Valente

Name of Committee Chair

BBA/iBBA Program Committee

Committee

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
  Schulich iBBA Program

2. Responsible Unit:
  Sustainability

3. Subject Code (Rubric) and Course Number:
  INTL 1400

4. Credit Value:
  3.00

5. Long Course Title: *Responsible Business in an International Context*

6. Short Course Title: *Responsible Business in an Intl. Context*

7. Type of Course Change(s) (indicate all that apply):

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

8. Effective Term/Calendar Year of Proposed Change(s):
  Fall 2026

V. July 2021

9. **Rationale:**

This course is a core course in the iBBA program. The iBBA program is scheduled to be officially closed in the fall of 2026. With the program closure, this course will no longer be required.

10. **Proposed Course Information:**
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

11. Enrolment Notes:
Not Applicable

12. Consultation:
Consultations with the Sustainability Area Chair

Existing Course Information (Change From):	Proposed Course Information (Change To):
Existing Long Course Title: Responsible Business in an International Context Short Course Title: Responsible Business in an International Context Calendar Description: Students will be challenged to think critically about the role of business in a sustainable world by considering some of the positive and negative impacts international business can have on society. Students will also be exposed to international companies that take a more integrated approach to responsible business and represent leaders in developing solutions to society's most difficult problems. Prerequisites/Corequisites/Course Exclusions: This course is not open to BBA students for credit, nor is it available to exchange students visiting Schulich.	

V. July 2021

![Schulich School of Business, York University logo]

Originator:

Mike Valente	April 22, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

Approvals:

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

Geoff Kistruck	April 22, 2023
Signature	Date

Geoff Kistruck	Sustainability
Name	Area or Specialization

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Programs
Name of Program Director	Program

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

V. July 2021

Mike Valente

April 28, 2023
_____
Signature   Date

Mike Valente

BBA/iBBA Program Committee
_____
Name of Committee Chair   Committee

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
Schulich iBBA Program

2. Responsible Unit:
Economics

3. Subject Code (Rubric) and Course Number:
INTL 2200

4. Credit Value:
3.00

5. Long Course Title: *International Economics*

6. Short Course Title: *International Economics*

7. Type of Course Change(s) (indicate all that apply):

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

8. Effective Term/Calendar Year of Proposed Change(s):
Fall 2026

9. **Rationale:**

This course is a core course in the iBBA program. The iBBA program is scheduled to be officially closed in the fall of 2026. With the program closure, this course will no longer be required.

10. Proposed Course Information:
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

11. Enrolment Notes:
Not Applicable

12. Consultation:
Consultations with the Economics Area Chair

Existing Course Information (Change From):	Proposed Course Information (Change To):
Existing Long Course Title: International Economics Short Course Title: International Economics Calendar Description: This core course examines international economics from the viewpoint of the firm and the nation. International trade, foreign investment, tariffs and other trade barriers, economic integration, the balance of payments, the foreign exchange market, and the international monetary system are among the topics studied. Note: Not open to BBA students for credit. Not available to exchange students visiting Schulich. Prerequisites: SB/INTL 1200 3.00 and SB/INTL 1210 3.00. Course Credit Exclusion: SB/ECON 3510 3.00.	

V. July 2021

Originator:

Mike Valente	April 22, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

Approvals:

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

Irene Henriques	April 22, 2023
Signature	Date

Irene Henriques	Economics
Name	Area or Specialization

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Programs
Name of Program Director	Program

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

V. July 2021

Mike Valente
_____
Signature

April 28, 2023
_____
Date

Mike Valente
_____
Name of Committee Chair

BBA/iBBA Program Committee
_____
Committee

V. July 2021

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
Schulich iBBA Program

2. Responsible Unit:
Organization Studies

3. Subject Code (Rubric) and Course Number:
INTL 2300

4. Credit Value:
3.00

5. Long Course Title: *Organizational Behaviour Across Cultures*

6. Short Course Title: *Organizational Behaviour Across Cultures*

7. Type of Course Change(s) (indicate all that apply):

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

8. Effective Term/Calendar Year of Proposed Change(s):
Fall 2026

9. **Rationale:**

This course is a core course in the iBBA program. The iBBA program is scheduled to be officially closed in the fall of 2026. With the program closure, this course will no longer be required.

10.Proposed Course Information:
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

Existing Course Information (Change From):	**Proposed Course Information (Change To):**
Existing Long Course Title: Organizational Behaviour Across Cultures Short Course Title: Organizational Behaviour Across Cultures Calendar Description: The purpose of this core course is to introduce students to organizational behaviour - a discipline that studies organizations and the individuals and groups within them. Furthermore, the course stresses the importance of developing an international perspective and cross-cultural sensitivity to organizational behaviour issues. Interpersonal and group skills and new ways of dealing with issues ranging from ethical use of organizationally based power to technological change to work-force diversity are introduced. Through cases, exercises, and experiential activities, skills in stress management, conflict, leadership, motivation, and other work-related issues will be introduced. The central objective of the course is to create a knowledge base from which students can develop organizational competence. The course is grounded in an assessment that the changing demands on managers imply a need for intellectual flexibility and an increasingly broad range of managerial skills.	

Note: Not open to BBA students for credit. Not available to exchange students visiting Schulich. Course Credit Exclusion: SB/ORGS 1000 3.00 and SB/ORGS 2010 3.00 (or equivalent)	

11. Enrolment Notes:
Not Applicable

12. Consultation:
Consultations with the Organization Studies Area Chair

Originator:

Mike Valente	April 22, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

Approvals:

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

V. July 2021

Ruodan Shao   April 22, 2023
Signature   Date

Ruodan Shao   ORGS
Name   Area or Specialization

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

Mike Valente   April 28, 2023
Signature   Date

Mike Valente   BBA/iBBA Programs
Name of Program Director   Program

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

Mike Valente   April 28, 2023
Signature   Date

Mike Valente   BBA/iBBA Program Committee
Name of Committee Chair   Committee

V. July 2021

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
Schulich iBBA Program

2. Responsible Unit:
Strategic Management Area

3. Subject Code (Rubric) and Course Number:
INTL 3000

4. Credit Value:
3.00

5. **Long Course Title:** Strategic Management for International Business

6. **Short Course Title:** Strategic Management for Intl Business

7. Type of Course Change(s) (indicate all that apply):

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

8. Effective Term/Calendar Year of Proposed Change(s):
Fall 2026

V. July 2021

9. **Rationale:**

This course is a core course in the iBBA program. The iBBA program is scheduled to be officially closed in the fall of 2026. With the program closure, this course will no longer be required.

10.Proposed Course Information:
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

Existing Course Information (Change From):	Proposed Course Information (Change To):
Existing Long Course Title: Strategic Management for International Business Short Course Title: Strategic Management for Intl Business Calendar Description: This core course focuses on the fundamental concepts of strategy and strategic management and explores the task of developing, implementing, executing and monitoring an organization's strategy, with particular focus on firms operating in international markets. The emphasis is on the problems and issues that affect the success of an entire organization. Examples are drawn from all sizes and types of organizations, although the majority of content and cases deal with profit-oriented enterprises operating in the competitive global business environment. The course uses readings, lectures, case discussions and role playing to expose students to a wide range of concepts and to the many type of situations that face managers and bear directly on an organization's ultimate success.	

Note: Not open to BBA students for credit. This course cannot be completed on Exchange. Prerequisites: Successful completion of all Year 1 and 2 core courses.	

11. Enrolment Notes:
Not Applicable

12. Consultation:
Consultation took place with the Strategic Management area chair.

Originator:

Mike Valente	April 24, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

Approvals:

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

V. July 2021

Willow Sheremata   **April 24, 2023**
Signature   Date

Willow Sheremata   SGMT
Name   Area or Specialization

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

Mike Valente   April 28, 2023
Signature   Date

Mike Valente   BBA/iBBA Programs
Name of Program Director   Program

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

Mike Valente   April 28, 2023
Signature   Date

Mike Valente   BBA/iBBA Program Committee
Name of Committee Chair   Committee

V. July 2021

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
Schulich iBBA Program

2. Responsible Unit:
BBA/iBBA Program Director

3. Subject Code (Rubric) and Course Number:
INTL 4300

4. Credit Value:
3.00

5. **Long Course Title:** *International Business Simulation*

6. **Short Course Title:** *International Business Simulation*

7. Type of Course Change(s) (indicate all that apply):

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

8. Effective Term/Calendar Year of Proposed Change(s):
Fall 2026

9. **Rationale:**

This course is a core course in the iBBA program. The iBBA program is scheduled to be officially closed in the fall of 2026. With the program closure, this course will no longer be required.

10.Proposed Course Information:
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

11. Enrolment Notes:
Not Applicable

12. Consultation:
Consultation took place with the Strategic Management area chair.

Existing Course Information (Change From):	Proposed Course Information (Change To):
Existing Long Course Title: International Business Simulation Short Course Title: International Business Simulation Calendar Description: Student teams use a sophisticated business simulation program to manage a firm through multiple years of operation in a competitive industry. All teams must integrate their knowledge of functional areas of business and ethics to develop a mission and strategy for their firm and implement the strategy in a dynamic market and consistently revise their strategy in response to the strategic moves of competing firms. At the same time, students must analyze and reflect upon the dynamics of expanding their operations to successfully compete in an international market. Prerequisites: SB/SGMT 3000 3.00 or INTL 3000 3.00 (previously offered as SB/INTL 4400 3.00) Not open to exchange students. Course Credit Exclusions: SB/SGMT 4150 3.00	

V. July 2021

Originator:

Mike Valente	April 22, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

Approvals:

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

Mike Valente	April 22, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Programs
Name of Program Director	Program

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

V. July 2021

Mike Valente
Signature

April 28, 2023
Date

Mike Valente
Name of Committee Chair

BBA/iBBA Program Committee
Committee

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

The following information is required for all proposals involving a minor modification to undergraduate and graduate program/ diploma/certificate academic requirements. Provide evidence of consultation, where appropriate. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

1. Program/ Diploma/Certificate:

Schulich BBA/iBBA programs

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

Fall 2023

3. Proposed Change(s) and Rationale:

a. A description of the proposed modification(s) and rationale, including alignment with academic plans.

With the addition of a new 6-credit work placement course, it is now possible for students to take up to 12 credits of work placement. While we are very supportive of student pursuit of work placement opportunities, we feel that we should, for the time being, cap work placements to 9 credits in total. This motion will ensure that this is the case.

We therefore propose that the following be inserted in the program:

Students may take a maximum of 9 credits of work placement courses chosen from the following list:

MGMT 4850 3.0: Work Placement
MGMT 4860 6.0: Extended Work Placement
IBUS 4100 3.0: Work Placement in the Global Context

b. An outline of the changes to requirements and the associated learning outcomes/objectives, including how the proposed requirements will support

(Revised: October 20, 2022)

the achievement of program/ diploma/certificate learning objectives.

The changes proposed do not change any requirements or associated learning outcomes. By making sure that students can only take so many work placement courses, we ensure that they are not compromising on some of their academic learning objectives.

c. An overview of the consultation undertaken with relevant academic units and an assessment of the impact of the modifications on other programs/ diplomas/certificates.

Consultation took place with a number of staff members at Student Services and the ADA 's office along with a preliminary discussion with the undergraduate program committee.

d. A summary of any resource implications and how they are being addressed.

There would be no resource implications.

e. A summary of how students currently enrolled in the program/ diploma/certificate will be accommodated.

Because this change is being made alongside the introduction of a new course that students haven't yet taken, there are no students to accommodate.

4. Calendar Copy:
Using the following two-column format, provide a copy of the relevant undergraduate, graduate program/diploma/certificate requirements as they will appear in the Schulich Undergraduate and Graduate Academic Handbooks.

*Please note: Senate requires that **FULL** Calendar copy be provided. Please include the entire program/ diploma/certificate section, not just text that is being revised. Please clearly and visibly indicate how the information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).*

Existing Program/ Diploma/Certificate Information (Change From):	Proposed Program/ Diploma/Certificate Information (Change To):
WORK PLACEMENT: IBUS 4100 3.00 & MGMT 4850 3.00	**WORK PLACEMENT:** IBUS 4100 3.00, MGMT 4850 3.00, MGMT 4860 6.0

(Revised: October 20, 2022)

IBUS 4100 3.00: Work Placement in the Global Context provides BBA and iBBA students who have completed at least first year with an opportunity to earn credit while gaining relevant international work experience.

MGMT 4850 3.00: Work Placement provides BBA and iBBA students who have completed at least first year with an opportunity to earn credit for gaining relevant work experience that need not have a global focus.

Work Placement courses develop competencies and skills in organizational work environments that augment the theories learned in an academic program setting. Students will apply concepts from their coursework in a practice-based work environment and reflect upon their actions.

The Schulich Startups Program Team-Up with Professor Farrokh Zandi unlocks exciting work placements that match handpicked Schulich BBA students with a collection of top Schulich Startups companies!

This special stream of the MGMT 4850 Course (managed jointly by Chris Carder, Executive Director, Office of Innovation & Entrepreneurship, and Professor Zandi) offers students the opportunity to gain relevant work experience while developing critical thinking and reflecting on the startup's theories and initiatives.

Student Eligibility: Work Placement and/or Work Placement in the Global Context can start after the completion of first year core courses, subject to approval obtained from the Undergraduate Program Director or Associate Director, and completion of liability requirements prior to start of the

IBUS 4100 3.00: Work Placement in the Global Context provides ~~BBA and iBBA~~ students who have completed their first year with an opportunity to earn credit while gaining relevant international work experience. This opportunity takes place in either the winter or fall semester at a minimum of 180 work hours or in the spring/summer term at a minimum of 240 work hours.

MGMT 4850 3.00: Work Placement provides ~~BBA and iBBA~~ students who have completed their first year with an opportunity to earn credit for gaining relevant work experience ~~that need not have a global focus.~~ This opportunity takes place in either the winter or fall semester at a minimum of 180 work hours or in the spring/summer term at a minimum of 240 work hours.

MGMT 4860 6.00: Extended Work Placement: Provides students with an opportunity to earn six credits of work-based experiential learning either across both fall and winter semesters or over the spring/summer semester. Students must complete a minimum of 360 hours of work if the placement takes place across the fall and winter semesters and a minimum of 480 hours of work if the placement takes place in the spring/summer term. This work-focused component of experiential education requires that students reflect on and apply content from academic coursework into a practical work environment.

Important Note: Enrolling in any combination of MGMT 4850 3.0, MGMT 4860 6.0, and IBUS 4100 3.0 must not exceed 9 credits.

(Revised: October 20, 2022)

placement. In addition, students must have a GPA of 5.0 or greater.

Note: International students may have to meet with International Relations if intending to undertake a work placement in Canada.

Student Application Process: Students will be given access to an online Work Placement course on their learning management system Canvas, after they have successfully completed Year 1 of the i/BBA program. Full application instructions and details can be found in the Work Placement course on Canvas. Applications are reviewed by the Associate Director, Undergraduate Programs. If eligible, students will be notified by Student & Enrolment Services and their enrolment in either MGMT 4850 3.00 or IBUS 4100 3.00 confirmed at that time.

For questions regarding Work Placement courses, students should contact undergraduate@schulich.yorku.ca.

Work Placement courses develop competencies and skills in organizational work environments that augment the theories learned in an academic program setting. Students will apply concepts from their coursework in a practice-based work environment and reflect upon their actions.

The Schulich Startups Program Team-Up ~~with Professor Farrokh Zandi~~ unlocks exciting work placements that match handpicked Schulich BBA students with a collection of top Schulich Startups companies!

This special stream of the MGMT 4850 Course (managed jointly by ~~Chris Carder,~~ the Executive Director, Office of Innovation & Entrepreneurship, and the Associate Program Director ~~Professor Zandi~~) offers students the opportunity to gain relevant work experience while developing critical thinking and reflecting on the startup's theories and initiatives.

Student Eligibility: Work Placement, ~~and/or~~ and Work Placement in the Global Context can start after the completion of first year core courses while Extended Work Placement can start once students have achieved 3rd year academic standing. All options are subject to approval obtained from the Undergraduate Program Director or Associate Director, and completion of liability requirements prior to start of the placement. In addition, students must have a GPA of 5.0 or greater.

Note: International students may have to meet with International Relations if intending to undertake a work placement in Canada.

Student Application Process: Students will be given access to an online Work

(Revised: October 20, 2022)

	Placement course on their learning management system Canvas, after they have successfully completed Year 1 of the i/BBA program. Full application instructions and details can be found in the Work Placement course on Canvas. Applications are reviewed by the Associate Director, Undergraduate Programs. If eligible, students will be notified by Student & Enrolment Services and their enrolment in MGMT 4850 3.00, MGMT 4860 6.00 or IBUS 4100 3.00 confirmed at that time. For questions regarding Work Placement courses, students should contact undergraduate@schulich.yorku.ca.

(Revised: October 20, 2022)

To: Faculty Council, Schulich School of Business
From: Farrokh Zandi, International Business
Date: April 14, 2023
Re: SB/MGMT 4860 6.00 Extended Work Placement - New Course Proposal

MOTION:

That faculty council approve the creation of a new course entitled SB/MGMT 4860 6.00: Extended Work Placement.

RATIONALE:

Currently, undergraduate students are able to take a maximum of 6 credits of work placements by taking two 3-credit courses (MGMT 4850 and IBUS 4100), one domestic and one global. This prevents students from pursuing work placement opportunities that are longer in duration and span more than one semester. The undergraduate program has seen an increase in employers that have been interested in placing students in such a scenario where the total hours required is beyond what is available in a 3-credit course and/or the employment period stretches beyond one semester.   As a result, the purpose of this course is to provide students with the opportunity to earn 6 credits with one work placement. With the introduction of this course, students will be permitted to take a maximum of 9 credits of work placement.

New Course Proposal Form
Schulich School of Business

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

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

1. Responsible Program:
   BBA/ iBBA Programs

2. Responsible Unit:
   Undergraduate Program Director

3. Subject Code (Rubric) and Course Number:
   MGMT 4860

4. Credit Value:
   6.00

5. Long Course Title:
   Extended Work Placement

6. Short Course Title:
   Extended Work Placement

7. Effective Term/Calendar Year:
   Fall 2023

8. Language of Instruction:
   English

9. Calendar (Short) Course Description:
This six-credit work-focused component of experiential education requires that students reflect on and apply theories and concepts learned from other courses to professional activities students engage in at a work environment. A minimum number of hours of work placement is required.

Enrolling in any combination of MGMT 4850 3.0, MGMT 4860 6.0, and IBUS 4100 3.0 must not exceed 9 credits.

10. Expanded Course Description:

"Tell me and I will forget.
Show me and I will remember.
Involve me and I will understand.
Step back and I will act."

This course provides undergraduate students with an opportunity to earn six credits of work-based experiential learning. The course must be taken either across both fall and winter semesters at a minimum of 360 hours of work or over the spring/summer semester at a minimum 480 hours of work. This work-focused component of experiential education requires that students reflect on and apply content from academic coursework into a practical work environment.

Acquiring an extended full-time work experience over two-terms (8 months) will enable students to develop the necessary competencies and skills such as collaboration, communication, and problem-solving that will prepare students to thrive in a challenging world. Such as experience will also allow students to gain exposure to different departments within the company and solve more complex projects and will complement students' areas of specialization with valuable work experience and career readiness supports.

Learning by doing represents a key strategy for impactful management education. Learning consists of four stages: (1) concrete experience ("DO"), (2) reflective observation ("OBSERVE"), (3) abstract conceptualization ("THINK")! and (4) knowledge transfer or active experimentation ("PLAN"). It is through the sequencing of these four activities that the dual outcome of learning course material as well as developing critical thinking can be attained. As a "work placement", this opportunity can represent paid or unpaid work by a sponsoring organization. In addition, students may elect to undertake a work placement that comes available through York University resources, or they may secure on their own.

11. Course Learning Outcomes:

It is expected that, after completing the placement course, students will have the following knowledge, skills, and general competencies:

Knowledge

- Knowledge about how their academic competence can be used in a practical work environment.
- Knowledge about how development, change and leader tasks are initiated and carried out in a work context.
- Knowledge of one's perspectives, assumptions, biases and knowledge deficiencies and how this knowledge contributes to personal growth, integrity and humility.

Skills

- The ability to apply academic knowledge to an employment environment.
- The ability to integrate theory and experience-based learning
- The ability to understand how businesses organize their work and relate academic questions to employment-related situations and contexts.
- The ability to reflect upon their own role and ability to act in relation to others as well as discuss the use of academic competence in practice.
- The ability to identify and speak against injustices in the workplace and to exemplify values of social justice by standing up for equity, diversity and inclusion
- The ability to critically assess their own work placement.
- The development of decision-making and critical thinking skills.

General competence

- Adjust to tasks, work-context and place in a given business.
- Draw on academic knowledge to contribute to employer's needs.
- Gain knowledge of a specific company/industry and learn specific common job functions such as marketing, management, customer service, accounting, security, PR, and production.
- Inculcate strong work habits, model ethical behaviour and incorporate knowledge of sustainability into work practices.

12. Rationale:
Currently, undergraduate students are able to take a maximum of 6 credits of work placements by taking two 3-credit courses (MGMT 4850 and IBUS 4100), one domestic and one global. This prevents students from pursuing work placement opportunities that are longer in duration and span more than one semester. The undergraduate program has seen an increase in employers that have been interested in placing students in such a scenario where the total hours required is beyond what is available in a 3-credit course and/or the employment period stretches beyond one semester. As a result, the purpose of this course is to provide students with the opportunity to earn 6 credits with one work placement. With the introduction of this course, students will be permitted to take a maximum of 9 credits of work placement.

13. Evaluation:

Assignment/Task	Task	Quantity	Weight
o **Academic Deliverables:**			
Mid-Term Report:	Activity log,	**1**	**10%**

Written deliverables:	Job description,	1	10%
	Reflective paper	1	15%
Final Report: Written deliverables:	Activity log,	1	10%
	Job description,	1	10%
	Reflective paper	1	25%
	Site analysis	1	20%
Total			**100%**
2) Supervisor's evaluation			
Mid-term evaluation	Satisfactory/Unsatisfactory		
Final evaluation	Satisfactory/Unsatisfactory		

14. Integrated Courses:
Not applicable

15. Cross-listed Courses:
Not applicable

16. Enrolment Notes:
This course is available only to students who have successfully completed their second year of study at Schulich.

Enrolling in any combination of MGMT 4850 3.0, MGMT 4860 6.0, and IBUS 4100 3.0 must not exceed 9 credits.

17. Faculty Resources:
Generally speaking, faculty resources needed to run this course are limited. The Associate Director of the Undergraduate program oversees and supervises all work placements. There is no class time in this course.

18. Physical Resources:
None required.

19. Bibliography and Library Statement:
Attached

V. July 2021

New Course Proposal Template
(Part B - Schulich Use Only)

20. Instructors and Faculty Coordinator

Initial instructor:
F. Zandi

Alternative instructors:
M. Valente

Course coordinator:
This course is coordinated by Associate Director or Director of Undergraduate Programs

21. Specializations

Primary area or specialization:
This course falls under the jurisdiction of the Undergraduate Program Committee

Secondary areas or specializations:
Not applicable

22. Student Contact and Enrolment

Contact hours:
Minimum of 360 hours of work placement for fall-winter term and a minimum of 480 hours of work placement for spring/summer term

Maximum enrolment:
200

Expected enrolment:
20

Evidence for enrolment expectations:
Enrollment in 3 credit work placements tends to be about 200 per year. We have seen an increase in supply of longer work placement opportunities by employers and an interest of undergraduate students in pursuing them.

Equity, Diversity, Inclusion, Decolonization and Indigenization Action Plan

We have included a number of elements in the syllabus that require students to reflect on these issues in their work placement. Students are required to reflect on their personal biases and assumptions, how they might see social injustices in the work placement and how their role as an employee in challenging injustices in the workplace.

23. Human Participants Research
Not applicable

24. Conditions for Approval

Provide a convincing case for the proposed course.
Currently, undergraduate students are able to take a maximum of 6 credits of work placements by taking two 3-credit courses (MGMT 4850 and IBUS 4100), one domestic and one global. This prevents students from pursuing work placement opportunities that are longer in duration and span more than one semester. The undergraduate program has seen an increase in employers that have been interested in placing students in such a scenario where the total hours required is beyond what is available in a 3-credit course and/or the employment period stretches beyond one semester. As a result, the purpose of this course is to provide students with the opportunity to earn 6 credits with one work placement. With the introduction of this course, students will be permitted to take a maximum of 9 credits of work placement.

Originator:

F. Zandi	April 15, 2023
Signature	Date

	International Business
Farrokh Zandi	
	Area or Specialization

Supporting Faculty Members

The faculty members whose names appear below (minimum 6) confirm that they have examined this course proposal. They feel it is a worthwhile addition to the SSB curriculum and does not, to their knowledge, significantly duplicate the content of existing courses. We have also consulted with various administrative departments at Schulich, particularly Student Services and International Relations and the ADA's office.

Linda Thorn   *Accounting*

V. July 2021

Irene Enriques   *Economics*

Theo Paridis   *Strategic Management*

Bukard Eberlein   *Responsible Business*

Minerva Cernea   *Development & Experiential Education Office*

Atipol Bhanich Supapol   *Economics*

Approvals

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

Signature	Date

Name of Coordinator or Director	Area or Specialization

Degree Program:
I support the addition of the course to the SSB curriculum.

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Programs
Name of Program Director	Program

V. July 2021

Program Committee:

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Course Outline
Academic year 2023-2024

This is a 6-credit pass/fail Schulich elective course.

Instructor
Dr. Farrokh Zandi
SSB N205
Tel: 416-736-2100, ext. 77959
fzandi@schulich.yorku.ca

Assistant
Jennifer Fernandez
Tel: 416-736-2100, ext. 66057
jfernandez@schulich.yorku.ca

Professor Zandi is a faculty member in the Economics Area, specialized in International Economics and Macroeconomics, and Associate Director of Undergraduate Programs at Schulich. He has taught at Schulich since 1991.

Brief Description:

This six-credit work-focused component of experiential education requires that students reflect on and apply theories and concepts learned from other courses to professional activities students engage in at a work environment. A minimum number of hours of work placement is required.

Enrolling in any combination of MGMT 4850 3.0, MGMT 4860 6.0, and IBUS 4100 3.0 must not exceed 9 credits.

Extended Description:

"Tell me and I will forget.
Show me and I will remember.
Involve me and I will understand.
Step back and I will act."

This course provides undergraduate students with an opportunity to earn six credits of work-based experiential learning. The course must be taken either across both fall and winter semesters at a minimum of 360 hours of work or over the spring/summer semester at a minimum 480 hours of work. This work-focused component of experiential education requires that students reflect on and apply content from academic coursework into a practical work environment.

Acquiring an extended full-time work experience over two-terms (8 months) will enable students to develop the necessary competencies and skills such as collaboration, communication, and problem-solving that will prepare students to thrive in a challenging world. Such as experience will also allow students to gain exposure to different departments within the company and solve more complex projects and will complement students' areas of specialization with valuable work experience and career readiness supports.

Learning by doing represents a key strategy for impactful management education. Learning consists of four stages: (1) concrete experience ("DO"), (2) reflective observation ("OBSERVE"), (3) abstract conceptualization ("THINK")! and (4) knowledge transfer or active experimentation ("PLAN"). It is through the sequencing of these four activities that the dual outcome of learning course material as well as developing critical thinking can be attained. As a "work placement", this opportunity can represent paid or unpaid work by a sponsoring organization. In addition, students may elect to undertake a work placement that comes available through York University resources, or they may secure on their own

Prerequisites/Eligibility/Preparation

(a) Student Eligibility Requirement:

To qualify for this course, year 3 standing is required with a minimum of grade point average of 5.0.

(b) Work Placement Eligibility Requirements

A placement opportunity is assessed and approved on an individual basis as a 6.00 credit Schulich elective course under the following conditions:
1. The host organization is located inside Canada.
2. The placement provides the student with academically meaningful and mentored relevant employment that potentially enables students to gain exposure to different departments within the company and solve complex projects.
3. The host organization provides the student with a letter of offer/contract specifying employment conditions, an accurate and informative job description, start and end dates, expected hours of work and the reporting supervisor's contact information.
4. The placement takes place across the fall and winter semesters at a minimum of 360 hours or in the spring-summer term at a minimum of 480 hours. Placements scheduled outside of this time period need to be approved by the Faculty Supervisor or Program Associate Director
5. The approval to enrol in this course by the Faculty Supervisor or Program Associate Director.

(c) Work Placement Preparation

In order for the work placement to be approved as a credit course, THE FOLLOWING STEPS MUST BE TAKEN. Students must submit a formal letter of placement offer from a qualified organization along with a TWO–PAGE proposal in support of their placement application. This proposal will contain:

1. site description,
2. description of work placement responsibilities and duties as specified in the offer letter,
3. students' academic, personal, and professional goals (expected learning outcome) for this experience, and
4. the list of skills, experiences and reflections students expect to gain from this experience, and how these skills are expected to meet their goals through the assigned tasks.

In addition to meeting academic requirements as stated above, students are required to complete the risk management procedures with Student Services.

Contents

Course Learning Outcomes

It is expected that, after completing the placement course, students will have the following knowledge, skills, and general competencies:

Knowledge

*   Knowledge about how their academic competence can be used in a practical work environment.
*   Knowledge about how development, change and leader tasks are initiated and carried out in a work context.
*   Knowledge of one's perspectives, assumptions, biases and knowledge deficiencies and how this knowledge contributes to personal growth, integrity and humility.

Skills

- The ability to apply academic knowledge to an employment environment.
- The ability to integrate theory and experience-based learning
- The ability to understand how businesses organize their work and relate academic questions to employment-related situations and contexts.
- The ability to reflect upon their own role and ability to act in relation to others as well as discuss the use of academic competence in practice.
- The ability to identify and speak against injustices in the workplace and to exemplify values of social justice by standing up for equity, diversity and inclusion
- The ability to critically assess their own work placement.
- The development of decision-making and critical thinking skills.

General competence

- Adjust to tasks, work-context and place in a given business.
- Draw on academic knowledge to contribute to employer's needs.
- Gain knowledge of a specific company/industry and learn specific common job functions such as marketing, management, customer service, accounting, security, PR, and production.
- Inculcate strong work habits, model ethical behaviour and incorporate knowledge of sustainability into work practices.

Deliverables at a Glance

Students' passing grade for this course is based on successful completion of the Work Placement which will be evaluated on submission and acceptance of the academic deliverables, listed below, as well as on completion of the Placement contract as verified by the site supervisor's letter of evaluation.

Mid-Term Report: At the half-way point of the placement, students are required to submit their midterm report that consists of (1) Time and Activity log completed during this period, (2) Description of their position- technical and non-technical work, skills learned, training received, special assignments and projects, (3) Reflective Paper, and (4) Supervisor's evaluation. The undergraduate work placement form, to be found on Canvas course, must be filled out by the site supervisor and sent directly to the Faculty Supervisor via email attachment.

Final Report: At the completion of work placement, students are required to submit the second and final report. This report will consist of (1) Time and Activity log completed in the second part of the placement, (2) Description of their new assignments and projects, positions, additional training received, etc., (3) an integrated Reflective Paper, and (4) Site analysis, and (5) the final Supervisor's evaluation, to be found on Canvas course, must be filled out by the site supervisor and sent directly to the Faculty Supervisor via email attachment.

For details, see "Written Assignments/Projects and Exam[s]: Descriptions" and "Evaluation …" (p. 5).

Written Assignments/Projects and Exam[s]: Descriptions

The academic deliverables must be uploaded on the Canvas course. **The supervisor's evaluation form, to be found on the Canvas course, must be emailed directly to the course coordinator.**

Assignment/Task	Task	Quantity	Weight
o **Academic Deliverables:**			
Mid-Term Report:	Activity log,	1	10%
Written deliverables:	Job description,	1	10%
	Reflective paper	1	15%
Final Report:	Activity log,	1	10%
Written deliverables:	Job description,	1	10%
	Reflective paper	1	25%
	Site analysis	1	20%
Total			100%
2) Supervisor's evaluation			
Mid-term evaluation	Satisfactory/Unsatisfactory		
Final evaluation	Satisfactory/Unsatisfactory		

Students who fail to produce a satisfactory letter of evaluation will not receive credits for this course.

Evaluation of Written Assignments/Projects and Exams

Time and Activity Log:

The Time and Activity log allows you to keep track of all the tasks, duties and assignments you perform during your placement. For each week, you must record in sufficient detail your primary activities in an activity log. Describe in each entry what you did in and learned about the organization, the work environment, your colleagues, customers, etc. during that week. Each log has a word limit of 200. All logs will be submitted as one document. This combined time and activity log is due two weeks after the completion of the placement.

Mid-Term Reflective Paper

There is a lot to learn in the professional sphere beyond purely analytical skills and a work placement is an excellent opportunity to prepare students for this challenge. An interim placement reflection paper is a type of reflection paper that focuses on how some students have adjusted and processed the difference between a classroom and a real job. You are to reflect on

where you are half-way through your work, and how you got there. As well, the question you need to answer is whether you have identified changes that need to be made in order to complete this work. What have you learned that might affect the way you continue? What have your learned about yourself at this point in the placement? How does this learning inform how you will continue with the placement? You should also determine some of the work-related goals and interests that you would like to build on in the second part of your placement. What things could you do before you leave that could help you pursue your career aspirations? Are there other comments or concerns you would like to discuss with you supervisor before the end of my internship?

The word limit for this reflective paper is 2000. Please indicate the word count on the cover page of the paper. The assignment is to be written in size 12 Times Roman font, double-spaced with one inch margins.

Final Reflective Paper:

Reflection means to complete the four stages of learning. It is an exercise that allows you to think about what you experienced and observed during your work placement and by doing so generate unique and lasting insights that make a positive difference in your personal and professional life. Through reflective activities, you are encouraged to analyze your actions and the material you are learning. As you go through your work placement you are encouraged to define your experience (answer the "what" question), then to illustrate its significance with respect to personal experience and professional practice (answer the "so what" question), and finally to plan the next steps (answer the "what now" question). You are encouraged to reflect thoughtfully upon and respond to the specific work environment, professional responsibilities, and your own role at your Placement location. Consider the best and worst parts of the Placement, why you liked/not liked certain activities and duties, and what you learned from the activities.

The Final Reflective Paper should be based on the entire Placement experience and should incorporate the following points of discussion:

(a) The method by which you secured the Placement opportunity. What worked well, and what would you do differently next time?
(b) The expected learning outcomes you had of the Placement when you chose it and whether those expectations have been met or changed as a result of the actual experience.
(c) The most important skills you developed and the most critical knowledge you gained during your Placement.
(d) Your own objective assessment of your work, performance, and contributions at the site. In what areas did you excel? In what areas did you struggle? Did anything you learned about yourself surprise you?

(e) A conflict or disappointment you experienced through your Placement and how you managed it?

(f) What perspectives, assumptions, biases and knowledge deficiencies did you have going into this work placement and how did your experience contribute to personal growth in these areas?

(g) What did it mean in this placement to exhibit strong work habits, model ethical behaviour and incorporate knowledge of sustainability into work practices?

(h) What does social justice mean in this work context and how did you exemplify values of social justice by standing up for equity, diversity and inclusion

The word limit for this reflective paper is 3000. Please indicate the word count on the cover page of the paper. The assignment is to be written in size 12 Times Roman font, double-spaced with one inch margins. This assignment is due two weeks after the completion of the placement.

Work Placement Site Analysis

The internal and external analysis of the organization. This report may include (but is not limited to):

(i) A description of the organization, its history, its core activities and how they may have changed over time, and an organizational chart,

(ii) A brief overview of the industry and its players (competitors, suppliers, customers, etc.),

(iii) A SWOT analysis,

and other relevant information and insights you gained about your site.

The word limit for the portfolio is 2000. Please indicate the word count on the cover page of the portfolio. The assignment is to be written in size 12 Times Roman font, double-spaced with one inch margins. This assignment is due two weeks after the completion of the placement.

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

For more details on the index, grading policy, and grade point average (GPA) requirements, see the Student Handbook or the Student Services & International Relations website:

http://schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Academic+Policies+BBA?OpenDocument

Academic honesty is fundamental to the integrity of university education and degree programs and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found on the Schulich website: http://schulich.yorku.ca/current-students/academic-honesty/

MEMORANDUM
York University Libraries

To: Farrokh Zandi, Associate Director of Undergraduate Programs, Schulich School of Business

From: Stephanie Quail, Scholarly Communications Librarian / Business Librarian, Digital Scholarship Infrastructure Department, York University Libraries

Date: April 17, 2023

Subject: Library Statement of Support – Extended Work Placement (MGMT 4860)

Summary

York University Libraries (YUL) is well positioned to support the proposed course. Students can make use of an array of library resources and services to help them complete their Work Placement Site Analysis, as well as the Final Reflective Paper in this course. This statement highlights offerings related to the major 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:

- Management, Project Management, Careers, and Career Development.

Historically, textbook publishers have not made their electronic content available for purchase by libraries. This remains an ongoing challenge. Library personnel can assist with locating Open Access alternatives. Furthermore, the Libraries' Open Scholarship department offers [support to researchers on digital publishing](#), open repositories, and Creative Commons licensing.

The Omni single-search interface provides students with access to a wide range of materials, including books, book chapters, articles, dissertations, streaming media, etc. Library users may also request items from partner libraries through Omni.

The below list highlights a selection of specialized business databases and article databases that students in this course can use to research the industry, the competitors, and the target markets / consumers for their selected work placement company. These databases should help them with their Work Placement Site Analysis assignment in the course. Finally, the A-Z list on the Libraries' website provides a complete list of electronic offerings, including all of the business databases YUL subscribes to.

Relevant Company & Industry Research Databases:
- IBISworld
- Marketline Advantage
- Mergent Online
- Passport

Business Article Databases:

- Proquest Business
- Business Source Complete

Newspaper/ Magazine Collections:

- Factiva
- Nexis Uni
- PressReader

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 of Interest:

- Career Research for Business Students
- Company Research
- Industry Research
- Market Research

Research Help

Online research assistance is available in both French and English via chat, text, and email. In addition, students and faculty can book one-hour research consultations with a specialist librarian. The Libraries also offer in-person drop-in research help services.

Accessibility Services

Located on the first floor of the Scott Library (Keele Campus), 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.

To: Faculty Council, Schulich School of Business
From: Mike Valente, BBA/iBBA Program Director
Date: April 21, 2023
Re: SB/MGMT 4100 3.0 - Course Retirement

MOTION: That Faculty Council approve the retirement of SB/MGMT 4100 3.0 – Integrative Business Simulation

RATIONALE:

This course is a core course in the BBA program. Effective Fall 2026 MGMT 4100 will no longer be available to students as a core course as it no longer significantly contributes to the overall program objectives. Instead, an elective of the same name, different rubric (SGMT 4150) will be offered to those students who wish to expand their education in the area of strategic management.

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
Schulich BBA Program

2. Responsible Unit:
BBA/iBBA Program Director

3. Subject Code (Rubric) and Course Number:
MGMT 4100

4. Credit Value:
3.00

5. Long Course Title: *Integrative Business Simulation*

6. Short Course Title: *Integrative Business Simulation*

7. Type of Course Change(s) (indicate all that apply):

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

8. Effective Term/Calendar Year of Proposed Change(s):
Fall 2026

9. Rationale:

This course is a core course in the BBA program. Effective Fall 2026 MGMT 4100 will no longer be available to students as a core course as it no longer significantly contributes to the overall program objectives. Instead, an elective of the same name, different rubric (SGMT 4150) will be offered to those students who wish to expand their education in the area of strategic management.

10. Proposed Course Information:
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

11. Enrolment Notes:
Not Applicable

Existing Course Information (Change From):	Proposed Course Information (Change To):
Existing Long Course Title: Integrative Business Simulation Short Course Title: Integrative Business Simulation Calendar Description: In this core course, student teams use a sophisticated business simulation program to manage a firm through multiple years of operation in a competitive industry. All teams must integrate their knowledge of functional areas of business and ethics to develop a mission and strategy for their firm, implement the strategy in a dynamic market and consistently revise their strategy in response to the strategic moves of competing firms. Note: Not available to exchange students visiting Schulich. Prerequisites: SB/SGMT 3000 3.0 or SB/INTL 3000 3.0 (Previously offered as SB/INTL 4400 3.00). Course Credit Exclusions: SB/SGMT 4150 3.00	

12. Consultation:

Consultation took place with the Strategic Management area chair

Originator:

Mike Valente	April 22, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

Approvals:

Area or Specialization

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

Mike Valente	April 22, 2023
Signature	Date

Mike Valente	Program Director
Name	Area or Specialization

Degree Program:

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Programs
Name of Program Director	Program

Program Committee:

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

V. July 2021

Mike Valente   April 28, 2023
_____   _____
Signature   Date

Mike Valente   BBA/iBBA Program Committee
_____   _____
Name of Committee Chair   Committee

To: BBA/iBBA Program Committee, Schulich School of Business
From: Moren Lévesque, Co-director, Entrepreneurial Studies
Date: March 16th, 2023
Re: A change in the calendar description of ENTR 3400 3.00 Business Essentials for Technology Entrepreneurs I

Motion:

Request that the BBA/iBBA Program Committee approves a change in the calendar description of ENTR 3400 3.00 Business Essentials for Technology Entrepreneurs I, whereby the "completion of 30 engineering credits" is replaced by the "completion of 30 credits from the Lassonde School of Engineering".

Rationale:

This course is specifically designed for students from the Lassonde School of Engineering. Students must have 30 credits from Lassonde as a prerequisite to take this course. The current calendar description is confusing because it specifies that students must take 30 engineering credits. Yet Lassonde also has other programs such as computer science that do not necessarily require engineering courses. Because this course is meant to be for all students enrolled at Lassonde, it is important that we simplify the prerequisite such that students must have 30 credits from the Lassonde School of Engineering rather than 30 specific credits in engineering.

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich BBA/iBBA

2. Responsible Unit:
   ENTR (Entrepreneurial Studies)

3. Subject Code (Rubric) and Course Number:
   ENTR 3400

4. Credit Value:
   3.00

5. Long Course Title:
   Business Essentials for Technology Entrepreneurs I

6. Short Course Title:
   Business Essentials for Technology Entrepreneurs I

7. Type of Course Change(s) (indicate all that apply):

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

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

9. Rationale:

Please indicate how the proposed change will contribute to the academic objectives of the course/program. Please provide a description of the amended learning outcomes/objectives for the course, if applicable. Additionally, please indicate if the course is presently inactive, active, or retired. Finally, please append the program's existing learning outcomes as a separate document.

This course is specifically designed for students from the Lassonde School of Engineering. Students must have 30 credits from Lassonde as a prerequisite to take this course. The current calendar description is confusing because it specifies that students must take 30 engineering credits. Yet Lassonde also has other programs such as computer science that do not necessarily require engineering courses. Because this course is meant to be for all students enrolled at Lassonde, it is important that we simplify the prerequisite such that students must have 30 credits from the Lassonde School of Engineering rather than 30 specific credits in engineering.

10. Proposed Course Information:

Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title: ENTR 3400 3.00 Business Essentials for Technology Entrepreneurs I	**Title: ENTR 3400 3.00 Business Essentials for Technology Entrepreneurs I**
This course has three modules: Organizational Behavior develops skills/knowledge of leadership, teamwork, negotiations and motivation. Marketing presents marketing strategy fundamentals. Operations Management reviews business processes to maximize supply under resource constraints.	This course has three modules: Organizational Behavior develops skills/knowledge of leadership, teamwork, negotiations and motivation. Marketing presents marketing strategy fundamentals. Operations Management reviews business processes to maximize supply under resource constraints.
Prerequisite: completion of 30 engineering credits.	Prerequisite: completion of 30 credits from the Lassonde School of Engineering.
Note: Open to students in the Lassonde School of Engineering or by permission of the Instructor and Lassonde Student Services.	Note: Open to students in the Lassonde School of Engineering or by permission of the Instructor and Lassonde Student Services.

strikethrough (left column), bold, underlining, colours, etc. (right column).

11. Enrolment Notes:

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

Yes. Open to students in the Lassonde School of Engineering or by permission of the Instructor and Lassonde Student Services.

12. Consultation:

For changes in integrations and cross-listings, as well as changes to courses that are integrated and/or cross-listed, please provide evidence that appropriate consultation has taken place.

Not applicable.

Originator:

(signature)	16 March 2023
Signature	Date

Moren Lévesque	Entrepreneurial Studies
Name	Area or Specialization

Approvals:

Area or Specialization

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

(signature)	16 March 2023
Signature	Date

Moren Lévesque	Entrepreneurial Studies
Name	Area or Specialization

Degree Program:

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA
Name of Program Director	Program

V. July 2021

Program Committee:

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

Mike Valente	April 28, 2023
Signature	Date
Mike Valente	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Business Essentials for Technology Entrepreneurs I
Course Outline
Fall 2022

Blended Delivery

Instructor
Mr. Narbe Alexandrian
nalexandrian@schulich.yorku.ca
Office hours: By email appointment only

Assistant
Clara Kan
N305A SSB
416-736-2100 x77960
ckan@schulich.yorku.ca

Narbe Alexandrian is the President and CEO of RIV Capital, a private equity and venture capital fund traded on the Canadian Stock Exchange (CSE:RIV). Prior to RIV Capital, Narbe worked as a venture capitalist at OMERS Ventures, the largest venture capital fund in Canada, responsible for close to $1 billion in assets under management. In his role, Narbe is responsible for researching and executing investment opportunities in the Technology, Media and Telecommunications (TMT) sector.

Prior to joining OMERS Ventures, Narbe worked as a Senior Strategy Manager at TELUS, developing and shaping their Internet of Things (IoT) segment. Narbe has also worked with a number of Software as a Service (SaaS) companies, developing operational and go-to-market strategies. Narbe began his career at Deloitte, within the Corporate Strategy and M&A Advisory groups, primarily working with private equity, pension funds and large corporates on a number of strategic initiatives.

Narbe has taught courses in technology entrepreneurship and accounting at the Schulich School of Business and Rotman Commerce, and has also been an instructor for the Canadian Institute of Chartered Professional Accountants. Narbe is a Chartered Accountant (CA) and Chartered Professional Accountant (CPA), and has a BBA from the Schulich School of Business.

Brief Description:

This course has three modules: Organizational Behavior develops skills/knowledge of leadership, teamwork, negotiations and motivation. Marketing presents marketing strategy fundamentals. Operations Management reviews business processes to maximize supply under resource constraints.

Prerequisite: completion of 30 credits from the Lassonde School of Engineering.

Note: Open to students in the Lassonde School of Engineering or by permission of the Instructor and Lassonde Student Services.

Contents

Course Learning Outcomes

For the *Organizational Behavior Module*:
Learn and practice the skills and behaviors associated with leadership of self, employees and teams, by developing an appreciation for authenticity, character and emotional intelligence in communication, leadership and team participation.
- Understand the benefits and limits of team decision making.
- Understand and apply the principles of motivation and reward systems.
- Learn and practice effective negotiation skills.
- Develop a reflexive awareness of one's own strengths and weaknesses.
- Practice effective communication and teamwork.

For the *Marketing Module*:
This session further examines strategy and entrepreneurship including the concepts of disruptive innovations and marketing. During the first part of the session, the importance and implications of the technology adoption life cycle are examined.
- Survey the key elements of entrepreneurial marketing, including a compelling product/service strategy, a well-crafted positioning statement, competitive differentiation, and a subsequent penetration strategy (including distribution, promotion and pricing).
- Practice assessing a firm's customers, company, competitors, collaborators and context.
- Understand the bases for segmenting markets, selecting an appropriate target market and positioning the firm to appeal to the target market.
- Assess the implications of target market selection for firm profitability.
- Understand and be able to develop an appropriate marketing mix to appeal to a selected target market, including product and packaging, pricing, channel selection and communication decisions.
- Present interim marketing strategies and respond to feedback.
- Produce a marketing plan.

For the *Operations Management Module*:
The Operations Management Module aims to enable the students to organize business processes to maximize supply given the resources available to the firm. The module provides the opportunity to learn these themes through readings, lectures, live discussions and case presentations.
- Assess what constrains business processes from creating more supply.
- Perform a managerial process analysis based on capacity.
- Avoid mismatches between supply and demand of successive process steps.
- Assess a project's completion time, how to accelerate that time, and how to deal with uncertainty.
- Analyze measures of performance to increase overall firm value from improving its operations.
- Eliminate waste from processes including idle time, defects, and unnecessary inventories.
- Recognize the forces behind new business models in order to facilitate their creation.
- Identify new business models that can increase customer value by leveraging firm operations.

Deliverables at a Glance

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

Assignment/Task	Quantity	Total %	Author
Reading & Class participation	1	15%	Individual
Marketing Plan	1	25%	Group
Problems - Reports	2	30%	Group
Final Exam	1	30%	Individual
		100%	

Course Material

Required Reading
Required reading for this course includes the following textbook chapters available for purchase online:

1. E-Book Custom Technology Ventures, **Byers, T., Daft, R., Nelson, A. 2014.Technology Ventures: From Idea to Enterprise, 4th Edition, McGraw-Hill Education – Available in YorkU Bookstore**

2. **Course Kit Electronic Download: To be provided**

Student Preparation for Class and Class Participation: Expectations

Class Participation
You will be assessed for your contribution to the discussion of course concepts from all required readings on a weekly basis. It is your responsibility to be prepared for each session according to the class outline. Students are expected to contribute to class discussion individually, which will require approximately 7-9 hours of preparation per week. If a student is unable to attend a particular session, please inform the instructor as early as possible.

Tips for class participation:
- Take brief notes on major issues covered in the assigned readings
- Think of questions of interest
- Be confident to talk and ask questions via video, audio or through chat

Blended Delivery Format (Six Classes In-Person and Six Online)

The Course is delivered in a blended format – meaning that six classes are delivered in-person and six are delivered online. The online classes feature a number of unique elements and features – including global Venture Capital and Technology Guest Lectures and Panellists previously unavailable to students due to geographical constraints (for these guests).

The following list of topics and readings indicate the material to be read, reviewed and/or prepared for the various sessions. **Required readings need to be completed before class**. Assignments are due at the start of class. If any changes in this schedule become necessary, the students will be notified through the course online system or via emails.

Session 1 Sept 12	**In-Person Class** **Organizational Behaviour Module** Course Overview and Motivation

Read:
- Course Outline
- Byers, Daft, Nelson - Chapter 1 (Section 1.1 and 1.5)
- **Case:** Gen Y in the Workforce (Ivey R0902X) **(Course Kit)**
- Graham, "Startups = Growth", http://www.paulgraham.com/growth.html

Session 2 Sept 19	**In-Person Class** Creating Value, Leading Teams and People

Read:
- Byers, Daft, Nelson – Chapter 2-4 (Sections 2.1, 2.2, 2.5, 3.3, 3.4, 4.1, 4.4 and 4.5 only)
- Feld, 2014, "Identify Leaders By Giving People Assignments" http://www.feld.com/archives/2014/12/identify-leaders-giving-people-assignments.html
- Horowitz, 2010, "Notes on Leadership: Be More Like Steve Jobs…" http://techcrunch.com/2010/03/14/notes-on-leadership-jobs-grove-campbel/
- Graham, "What We Look for in Founders", http://www.paulgraham.com/founders.html
- Suster, "Spotting, Nurturing and Mentoring Talent", https://bothsidesofthetable.com/spotting-nurturing-and-mentoring-talent-the-power-of-troy-carter-fb569d33ce6f

Session 3 Sept 26	**In-Person Class** Sales and Negotiations

Read:
- Byers, Daft, Nelson – Chapter 5-6 (Sections 5.1, 5.4, 6.1, 6.5 only)
- Sebenius, 2001, "Six Habits of Merely Effective Negotiators," Harvard Business Review **(Course Kit)**
- Hubspot Blog, "How to Talk to Pretty Much Anyone About Pretty Much Anything" https://blog.hubspot.com/marketing/networking-tips-talking-to-new-people
- Dixon, Adamson, 2011 "Selling is Not About Relationships" https://hbr.org/2011/09/selling-is-not-about-relatio
- a16z, "If SaaS Products Sell Themselves, Why Do We Need Sales?", https://a16z.com/2014/05/30/selling-saas-products-dont-sell-themselves/
- Predictable Revenues, 4 Mistakes 95% of Salespeople Make With Cold Emails https://predictablerevenue.com/blog/mistakes-salespeople-make-with-cold-emails

Session 4 Oct 3	**Virtual Class**

Globalization, Management and Rewards

Read:
- Byers, Daft, Nelson – Chapter 12 & 15 (Sections 12.3, 12.4, 15.1 and 15.3 only)
- Ben's Blog - Titles and Promotions, *Ben Horowitz,* March 16, 2011
  https://a16z.com/2011/03/16/titles-and-promotions/
  http://www.bhorowitz.com/titles_and_promotions
- Ben's Blog – How to Minimize Politics in Your Company
  https://a16z.com/2010/08/24/how-to-minimize-politics-in-your-company/
- Suster, Understanding the Consequences of the Business Decisions You Fudge On
  http://www.bothsidesofthetable.com/2013/03/10/consequences-and-the-decisions-we-make-or-dont/

Thanksgiving – No Class

Oct 10	

Session 5 Oct 17	**In Person Class**

Marketing Module
Segmenting, Targeting & Positioning

Read:
- Mars Innovation, "How to estimate market size: Business and marketing planning for startups" http://www.marsdd.com/mars-library/how-to-estimate-market-size-business-and- marketing-planning-for-startups/
- Evans, 2015, "Ways to Think About Market Sizing" http://ben-evans.com/benedictevans/2015/2/28/market-size
- Steenburgh and Avery, 2011, "Customer Lifetime Value Analysis," Harvard Business Review **(Course Kit)**
- **Case**: Customer Segmentation and Business Model Evolution at Unbounce Ivey Publishing (Ivey 9B14A029) **(Course Kit)**

Written Assignment #1 Due

Session 6 Oct 24	**Virtual Class** Success via Marketing

Read:
- Byers, Daft, Nelson – Chapter 7-8 (Sections 7.1, 7.3, 8.1 and 8.2 only)
- Suster, 2013 How to Know When to Sell vs. When to Market to Customers
  http://www.bothsidesofthetable.com/2013/07/09/how-to-know-when-to-sell-vs-when-to-market-to-customers/
- Fiona Livingston, Medium, "Does Your Brand Have a Point?",
  https://fiona-livingston.medium.com/does-your-brand-have-a-point-bbac6ff5b3a9

Guest Lecturer: [Founder of Tech Company with Exit]

Session 7   **Virtual Class**
Oct 31   Marketing Mix

      Read:
- Byers, Daft, Nelson – Chapter 9 (All)
- Texiera, 2012, "Marketing Communications," Harvard Business Review **(Course Kit)**
- Feld, "The Illusion of Product Market Fit", https://www.feld.com/archives/2015/01/illusion-product-market-fit-saas-companies.html
- Suster, "How to Decrease the Odds That Your Startup Fails", https://bothsidesofthetable.com/how-to-decrease-the-odds-that-your-startup-fails-e0fc13213792

      Guest Lecturer: [Founder of Tech Company, Series A]

Session 8   **Virtual Class**
Nov 7

      Operations Management Module
      Supply Process: Evaluating Process Capacity

      Read:
- Byers, Daft, Nelson – Chapter 10-11 (Sections 10.1, 10.5 and 11.1 only)
- "Crossing the Chasm Meets the Lean Startup," Geoffrey Moore, https://www.linkedin.com/pulse/article/20140211194912-110300724-crossing-the-chasm-meets-the-lean-start-up
- Suster, "How to Decrease the Odds That Your Startup Fails", https://bothsidesofthetable.com/how-to-decrease-the-odds-that-your-startup-fails-e0fc13213792

      Guest Lecturer: [Founder of Tech Company with Exit]

Session 9   **Virtual Class**
Nov 15   Value Chain

      Read:
- Byers, Daft, Nelson – Chapter 13 and 14 (Sections 13.1, 13.4, 14.1 and 14.5 only)
- Suster, "The Fallacy of Channels: Startups Beware" http://www.bothsidesofthetable.com/2010/02/23/the-fallacy-of-channels-startups-beware/
- Graham, "Do Things that Don't Scale" http://www.paulgraham.com/ds.html
- Suster, How to Present and Answer Questions in a Team Presentation or VC Pitch, https://bothsidesofthetable.com/how-to-present-and-answer-questions-in-a-team-presentation-or-vc-pitch-99af0cc4c39

      Written Assignment #2 Due

      Guest Lecturer: [C-Level, Series B Startup]

Session 10 Nov 21	**In Person Class**
	Group Presentations
	Marketing Plan - Group Presentations

Session 11 Nov 28	**Virtual Class**
	From Idea to Execution: The Lean Startup Method
	Read:

- Excerpts from The Startup Owner's Manual available on Inc.com - Introduction and 9 Deadliest Start-up Sins
- Why the Lean Start-Up Changes Everything by Steve Blank https://hbr.org/2013/05/why-the-lean-start-up-changes-everything
- Graham, Ideas for Startups, http://www.paulgraham.com/ideas.html

Guest Lecturer: [Partner, Top-Tier VC Fund]

Session 12 Dec 5	**In Person Class**
	Course Review
	Marketing Group Project Due

Final exam during exam period

Written Assignments/Projects: Descriptions

Within each module, **groups of 3-4 students** will hand in assignments on the following case studies. Reports will be written based on the structure presented on Week 10, written with Arial 12-point font, 1" margins, single-spaced at a maximum of 1,500 words.

Due Date

Week 5   Innovation and Human Capital

Oct 17   iQmetrix: The Customer Is Always Right? *Ivey Publishing* (Ivey 9B16M028)

Week 9   Lean Startup Mentality

Nov 14   Pets.com: The Rise and Decline of a Pet Supply Retailer *Ivey Publishing* (Ivey 9B13D007)

Projects and Exams

Note: Late assignments will not be accepted.

Class Participation & Readings: Students are expected to be in class and participate in the discussions. 15% of the final grade is reserved for class participation. Each student must show that s/he has read and seriously thought about the assigned reading material (including cases). Also, each student should be prepared to make contributions from her/his own background. An individual's class participation grade will be an evaluation of the quality and quantity of this individual's contributions to class discussions. The class participation grade will be significantly lower for those who have the habit of showing up late to class.

Marketing Plan: For the *Marketing Module*, **groups of 3-4 students** must develop a marketing plan for a product or service of their choice, including market segmentation, targeting and positioning (backed up by solid rationale based on market size and expected profitability), along with marketing mix decisions for product, price, place and promotion. Some class time will be allotted to work on the plan, and groups will present an interim version of the plan for feedback from their classmates. The interim version will be a PowerPoint presentation of no more than 10 slides (excluding title page). The text of the final marketing plan should be no longer than 2000 words, excluding appendices. This assignment is worth 25% of the final grade.

Examination: An open-book final exam of about 2 hours duration will account for 30% of the final grade, split evenly across all sections of the course. This exam is to be an individual effort and there is no makeup exam in this course. The University's Registrar's office sets specific examination dates after the term begins and enrolment patterns are identified.

In this class, final course grades will be determined by the following process:

The letter-grade system is the fundamental system of assessment of performance in undergraduate programs at York University. For information regarding the pass/fail option regulations, refer to the grading information available in your Faculty's section of the Undergraduate Calendar.

The corresponding grade points awarded for each grade are:

Grade	Grade Point	Percent Range	Description
A+	9	95 – 100	Exceptional
A	8	90 – 94	Excellent
B+	7	85 – 89	Very good
B	6	75 – 84	Good
C+	5	70 – 74	Competent
C	4	60 – 69	Fairly competent
D+	3	55 – 59	Passing
D	2	50 – 54	Marginally passing
E	1	(Marginally below 50)	Marginally failing
F	0	(Below 50%)	Failing

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

Grading
Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is D (2). To keep final grades comparable across courses, the average course grade within a section of an undergraduate course is normally between 5.5 and 7.0.
The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor.
For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

Academic Honesty
Academic honesty is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may also be found on Schulich website: http://schulich.yorku.ca/current-students/academic-honesty/ (Links to an external site.)
Accommodations
For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services. For counseling & disability services, contact Student Services or see http://accessibility.students.yorku.ca/ (Links to an external site.).

Exams (Absence from)
Midterm
Students who miss a mid-term examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence*. Instructors may request that students submit a copy of their documentation to Student & Enrolment Services. Accommodations and/or re-scheduling of the mid-term exam will be left to the discretion of the course instructor with the expectation that the case be resolved within 14 calendar days.

Final
Within 24 hours of missing a final examination students must contact their course instructor. Students must also submit a completed Deferred Standing Request Form within 48 hours online. Formal documentation* (e.g. Counselor's Statement, death certificate, etc.) regarding the reason for missing the exam must be submitted electronically via file upload as part of the form. The Deferred Standing Request form can be found at https://schulich.yorku.ca/exam-deferral (Links to an external site.). Student & Enrolment Services will notify the instructor and copy the student by email if appropriate documentation has been received.

For full details regarding exam deferrals, consult the Undergraduate Academic Handbook (pg.30) and/or the Graduate Policy Handbook (pg. 23).

* Currently, students are not required to submit a doctor's note or an Attending Physician's Statement in support of missed midterms, exams and/or requests for deferred standing for courses impacted by the COVID-19 situation. If you haven't already done so, we strongly encourage you to connect with your course instructor(s) first to make other arrangements to complete outstanding work, as a deferred standing may not be necessary.

Visiting Campus
All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:
- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.
-

More Information about COVID-19 health and safety measures can be found on the Better Together (Links to an external site.) website.

Encouraging a Community of Care
As pandemic-weariness increases, instructors and students are encouraged to uphold compassion, kindness, empathy, and a sense of responsibility towards one another amid such uncertainty and strain. Students are reminded of their duties and responsibilities to uphold professional and respectful interactions with their instructors and classmates, including, but not limited to: the University's zero tolerance for inappropriate conduct in virtual forums; the safeguarding of people's intellectual property; and our collective responsibility to protect academic honesty at all times but especially in those situations when we face difficulty and stress, or when there is opportunity or temptation to cheat. These points, and others, are addressed in the University's Senate Policy on Academic Honesty (Links to an external site.) and Code of Students Rights and Responsibilities (Links to an external site.).

Student Rights and Responsibilities
York University is a place of teaching, research, and learning where people value civility, diversity, equity, honesty and respect in their direct and indirect interactions with one another.

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities (Links to an external site.)**. All students have rights and responsibilities as outlined in

this document and are expected to uphold the identified values for the benefit of the entire community.

Violations of community standards are taken seriously and investigated by the Office of Student Community Relations and other appropriate parties (http://oscr.students.yorku.ca/ (Links to an external site.)). For details on how to handle a breach of community standards, visit the Office of Student Community Relations website at: https://oscr.students.yorku.ca/student-conduct (Links to an external site.). Every student agrees by the act of registration and enrolment to be bound by the regulations and policies of York University and of the Schulich School of Business.

Take time to fully review the Code of Student Rights and Responsibilities:
https://secure.students.yorku.ca/pdf/CodeofRightsandResponsibilities.pdf (Links to an external site.)

** Please note that academic policies specific to this course may be contained in other parts of this course outline.

Schulich School of Business Memorandum

To: BBA/iBBA Program Committee, Schulich School of Business
From: Moren Lévesque, Co-director, Entrepreneurial Studies
Date: March 16th, 2023
Re: A change in the calendar description of ENTR 3600 3.00 Business Essentials for
        Technology Entrepreneurs II

Motion:

Request that the BBA/iBBA Program Committee approves a change in the calendar description of ENTR 3600 3.00 Business Essentials for Technology Entrepreneurs II, whereby the "completion of 30 engineering credits" is replaced by the "completion of 30 credits from the Lassonde School of Engineering".

Rationale:

This course is specifically designed for students from the Lassonde School of Engineering. Students must have 30 credits from Lassonde as a prerequisite to take this course. The current calendar description is confusing because it specifies that students must take 30 engineering credits. Yet Lassonde also has other programs such as computer science that do not necessarily require engineering courses. Because this course is meant to be for all students enrolled at Lassonde, it is important that we simplify the prerequisite such that students must have 30 credits from the Lassonde School of Engineering rather than 30 specific credits in engineering.

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich BBA/iBBA

2. Responsible Unit:
   ENTR (Entrepreneurial Studies)

3. Subject Code (Rubric) and Course Number:
   ENTR 3600

4. Credit Value:
   3.00

5. Long Course Title:
   Business Essentials for Technology Entrepreneurs II

6. Short Course Title:
   Business Essentials for Technology Entrepreneurs II

7. Type of Course Change(s) (indicate all that apply):

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

8. Effective Term/Calendar Year of Proposed Change(s):
   Winter 2024

9. Rationale:

Please indicate how the proposed change will contribute to the academic objectives of the course/program. Please provide a description of the amended learning outcomes/objectives for the course, if applicable. Additionally, please indicate if the course is presently inactive, active, or retired. Finally, please append the program's existing learning outcomes as a separate document.

This course is specifically designed for students from the Lassonde School of Engineering. Students must have 30 credits from Lassonde as a prerequisite to take this course. The current calendar description is confusing because it specifies that students must take 30 engineering credits. Yet Lassonde also has other programs such as computer science that do not necessarily require engineering courses. Because this course is meant to be for all students enrolled at Lassonde, it is important that we simplify the prerequisite such that students must have 30 credits from the Lassonde School of Engineering rather than 30 specific credits in engineering.

10. Proposed Course Information:

Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title: ENTR 3600 3.00 Business Essentials for Technology Entrepreneurs II This course has three modules: Accounting presents financial accounting fundamentals for business planning; Finance presents finance fundamentals to enable fund raising and resource allocation decisions; Strategy explores competitive analysis and strategic planning. Prerequisite: completion of 30 engineering credits. Note: Open to students in the Lassonde School of Engineering or by permission of the Instructor and Lassonde Student Services.	**Title: ENTR 3600 3.00 Business Essentials for Technology Entrepreneurs II** This course has three modules: Accounting presents financial accounting fundamentals for business planning; Finance presents finance fundamentals to enable fund raising and resource allocation decisions; Strategy explores competitive analysis and strategic planning. Prerequisite: completion of 30 credits from the Lassonde School of Engineering. Note: Open to students in the Lassonde School of Engineering or by permission of the Instructor and Lassonde Student Services.

strikethrough (left column), bold, underlining, colours, etc. (right column).

11. Enrolment Notes:

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

Yes. Open to students in the Lassonde School of Engineering or by permission of the Instructor and Lassonde Student Services.

12. Consultation:

For changes in integrations and cross-listings, as well as changes to courses that are integrated and/or cross-listed, please provide evidence that appropriate consultation has taken place.

Not applicable.

Originator:

[signature]	16 March 2023
Signature	Date

Moren Lévesque	Entrepreneurial Studies
Name	Area or Specialization

Approvals:

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

[signature]	16 March 2023
Signature	Date

Moren Lévesque	Entrepreneurial Studies
Name	Area or Specialization

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA
Name of Program Director	Program

V. July 2021

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

Mike Valente	April 28, 2023
Signature	Date
Mike Valente	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Course Outline
Winter 2023

Monday, 7:00pm – 10:00pm, <u>beginning in January 2023</u>
Remote/Online delivery

Instructor	**Assistant**
Mr. Narbe Alexandrian	Clara Kan
nalexandrian@schulich.yorku.ca	N305A SSB
Office hours: By email appointment only	416-736-2100 x77960
	<u>ckan@schulich.yorku.ca</u>

Narbe Alexandrian is the Founder and CEO of Define Capital, a private equity vehicle in the software space. Prior to Define Capital, Narbe was the President and CEO of RIV Capital, a private equity and venture capital fund traded on the TSXV, TSX and now the Canadian Stock Exchange (CSE:RIV). Prior to RIV Capital, Narbe worked as a venture capitalist at OMERS Ventures, the largest venture capital fund in Canada, responsible for close to $1 billion in assets under management. In his role, Narbe is responsible for researching and executing investment opportunities in the Technology, Media and Telecommunications (TMT) sector.

Prior to joining OMERS Ventures, Narbe worked as a Senior Strategy Manager at TELUS, developing and shaping their Internet of Things (IoT) segment. Narbe has also worked with a number of Software as a Service (SaaS) companies, developing operational and go-to-market strategies. Narbe began his career at Deloitte, within the Corporate Strategy and M&A Advisory groups, primarily working with private equity, pension funds and large corporates on a number of strategic initiatives.

Narbe has taught courses in technology entrepreneurship and accounting at the Schulich School of Business and Rotman Commerce, and has also been an instructor for the Canadian Institute of Chartered Professional Accountants. Narbe is a Chartered Accountant (CA) and Chartered Professional Accountant (CPA), and has a BBA from the Schulich School of Business.

Brief Description

This course has three modules: Accounting presents financial accounting fundamentals for business planning; Finance presents finance fundamentals to enable fund raising and resource allocation decisions; Strategy explores competitive analysis and strategic planning.

Prerequisite: completion of 30 credits from the Lassonde School of Engineering.

Note: Open to students in the Lassonde School of Engineering or by permission of the Instructor and Lassonde Student Services.

Contents

Course Learning Outcomes

For the *Accounting Module*:
- Understand the accounting processes
- Translate economic information into accounting data
- Understand the structure of financial statements
- Read and critically analyze financial reports
- Create the full set of financial reports required for a business plan
- Use accounting information as a tool for refining a firm's business model

For the *Finance Module*:
- Understand future and present values
- Calculate net present values and internal rates of return
- Understand the difference between real and nominal cash flows and interest rates
- Compare among projects' value
- Identify relevant data for calculating cash flows
- Apply accounting information in cash flow analysis
- Perform sensitivity analysis
- Understand the advantages and disadvantages in debt and equity financing
- Understand the advantages and disadvantages of the various valuation methods
  Evaluate new business ventures

For the *Strategy Module*:
- Understand what strategy is and how it creates value for the firm's shareholders
- Integrate and synthesize various perspectives to formulate a coherent firm strategy
- Analyze the competitive environment of an organization
- Assess whether a company possesses the right mix of resources and capabilities to compete successfully
- Learn how managers can leverage their resources and capabilities across several markets or industries
- Put strategy into action by designing structures that are congruent with each other and with the overall strategy of the firm
- Compare among different strategic options, while taking into account the threats and opportunities facing the organization
- Understand how organizations create and capture value

Deliverables at a Glance

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

Assignment/Task	Quantity	% Weight	Author
Readings & class participation	1	20%	Individual
Case Study	2	20%	Group
Midterm	1	20%	Individual
Final exam	1	40%	Individual
		100%	

Course Material

Required reading for this course includes the following custom textbook edition available for purchase from the York University bookstore that is based on:

- For the *Accounting Module* – **Friedlan, J. 2010. *Financial Accounting: A Critical Approach, with Connect*, 5th Ed., McGraw-Hill Ryerson**.
- For the *Finance Module* – **Byers, T., Daft, R., Nelson, A. 2014.Technology Ventures: From Idea to Enterprise, 5th Edition, McGraw-Hill Education – Available in YorkU Bookstore**
- **Course Kit Electronic Download:**
  https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c00000EIl3hEAD

Student Preparation for Class and Class Participation: Expectations

Class Participation

You will be assessed for your contribution to the discussion of course concepts from all required readings on a weekly basis. It is your responsibility to be prepared for each session according to the class outline. Students are expected to contribute to class discussion individually, which will require approximately 7-9 hours of preparation per week. If a student is unable to attend a particular session, please inform the instructor as early as possible.

Tips for class participation:
- Take brief notes on major issues covered in the assigned readings
- Think of questions of interest
- Be confident to talk and ask questions

Class-by-Class Syllabus

*The following list of topics and readings indicate the material to be read, reviewed and/or prepared for the various sessions. Required readings need to be completed **before** class. Assignments are due at the start of class. If any changes in this schedule become necessary, the students will be notified through the course online system or via emails.*

Session 1 Jan 9	**In Person Class** **Accounting Module Introduction** Overview of Financial Statements Read:

- Friedlan Ch.2

Session 2
Jan 16

In Person Class

The Accounting Cycle
The Balance Sheet / The Income Statement

Read:
- Friedlan Ch.3

Session 3
Jan 23

In Person Class

Cash Flow & Profitability
The Cash Flow Statement

Read:
- Friedlan Ch.5

Session 4
Jan 30

In Person Class

Using Accounting Information to Refine a Firm's Business Model
A Business Plan's Financial Statements

Read:
- Friedlan Ch.6

| Session 5 | **In Person Class** |
| Feb 6 | Midterm |

Session 6	**Virtual Class**
Feb 13	**Finance Module Introduction**
	Venture Finance I

Read:
- Technology Ventures (Byers, Dorf, and Nelson): Chapters 15, 16, 17 (Sections 15.1, 15.3, 16.1, 16.2, 16.3, 17.1, 17.4, 17.5 only).
- Investopedia, "Valuing Startup Ventures": http://www.investopedia.com/articles/financial-theory/11/valuing-startup-ventures.asp
- Entrepreneur Magazine, "How to Value Your Startup", http://www.entrepreneur.com/article/72384

| Feb 20 | *Reading Week – No Class* |

| Session 7 | **Virtual Class** |
| Feb 27 | Venture Finance II |

Read:
- Technology Ventures (Byers, Dorf, and Nelson): Chapters 18, 19, 20 (Sections , 18.1, 18.3, 18.9, 19.1, 19.2, 20.1, 20.2, 20.3 only).
- Forbes, A Guide To Venture Capital Financings For Startups: https://www.forbes.com/sites/allbusiness/2018/03/29/a-guide-to-venture-capital-financings-for-startups/?sh=336bf58e51c9
- "Should Startups Focus on Profitability or Not?" by Mark Suster: http://www.bothsidesofthetable.com/2011/12/27/should-startups-focus-on-profitability-or-not/

Guest Lecturer: TBD
Assignment 1 Due: Tom.com: Valuation of an Internet Company (course kit)

Session 8	**Virtual Class**
Mar 6	Breakeven Analysis
	Sensitivity Analysis

Read:
- Investopedia, Break-even Analysis: http://www.investopedia.com/terms/b/breakevenanalysis.asp
- Inc. Magazine, How to Perform a Break-Even Analysis: http://www.inc.com/guides/2010/12/how-to-perform-a-break-even-analysis.html
- RedRocketVC, Lesson #105: Run a Sensitivity Analysis on Your Projections: http://redrocketvc.blogspot.ca/2012/01/lesson-105-run-sensitivity-analysis-on.html

- Business Insider, Startups Without Financial Projections are Doomed:
  http://www.businessinsider.com/startups-without-financial-projections-are-doomed-2011-6

Session 9 Mar 13	**Virtual Class** Stock Options and Equity Compensation

Read:
- Technology Ventures (Byers, Dorf, and Nelson): Review Section 12.8 (Recruiting and Retention)
- MaRS Discovery District, Employee Stock Options :
  https://www.marsdd.com/mars-library/offering-employees-equity-startup-stock-options-plans/
- Inc. Magazine, How to Explain Stock Options to Employees:
  http://www.inc.com/bill-harris/how-to-explain-stock-options-to-employees.html
- Forbes, All You Need to Know About IPOs, Going Public and Stock Options:
  http://www.forbes.com/sites/kellyphillipserb/2012/05/14/all-you-need-to-know-about-ipos-going-public-and-stock-options/

Guest Lecturer: TBD

Session 10 Mar 20	**Virtual Class** **Strategy Module Introduction** Analyzing the Internal and External Environment

Read:
- Forbes, Facebook Through The Lens Of Porter's Five Forces
  https://www.forbes.com/sites/greatspeculations/2014/11/28/facebook-through-the-lens-of-porters-five-forces/?sh=173aae3e7dd3
- Mark Suster, Why Startups Need a Well Articulated Strategy (And How to Think About Yours): http://www.bothsidesofthetable.com/2013/06/04/why-startups-need-a-well-articulated-strategy-and-how-to-think-about-yours/

Guest Lecturer: TBD
Assignment 1 Due: Netflix Inc.: Streaming Away from DVDs (course kit)

Session 11   **Virtual Class**
Mar 27   Creating & Sustaining Competitive Advantages

      Read:
- TheNextWeb, Barriers to entry: How to build a startup that has an unfair advantage: http://thenextweb.com/entrepreneur/2014/05/28/barriers-entry-build-startup-unfair-advantage/
- VentureBeat, Design is becoming a competitive advantage for startups: http://venturebeat.com/2011/10/05/design-is-becoming-a-competitive-advantage-for-startups/

      Guest Lecturer: TBD

Session 12   **In Person Class**
Apr 3   Final Exam Review
      Entrepreneurship and Your Future

      Read:
- TED video: Why 30 is not the new 20 (video) https://www.ted.com/talks/meg_jay_why_30_is_not_the_new_20?language=en

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Final exam during exam period

Evaluation of Written Assignments/Projects and Exams

Class Participation & Readings: Students are expected to be in class and participate in the discussions. **20%** of the final grade is reserved for class participation. Each student must show that s/he has read and seriously thought about the assigned reading material (including cases). Also, each student should be prepared to make contributions from her/his own background. An individual's class participation grade will be my evaluation of the quality and quantity of this individual's contributions to class discussions. The class participation grade will be significantly lower for those who have the habit of showing up late to class or do not participate regularly.

Mid-Term: In Week 5, students will write a 90 minute in-class mid-term examination, covering the topics learned in the accounting module. The mid-term exam will worth **20%** of the final grade.

Cases Analysis: For the *Finance Module*, **groups of 4-5 students** must read and write an analysis of the case described below. Each report comprises **10%** of the final grade. The report is due on the day the corresponding case is assigned for class discussion. Late reports will not be accepted. In the case analysis, students act as consultants and are expected to advise the entrepreneur in the case how to proceed. Students are encouraged to utilize concepts studied in this course in their analysis. A good writing style and creativity are important. Diction, grammar, spelling, and neatness will also be important parts of the grade. The axiom that a report either should be good or long does not apply here; rather the report simply should be good.

Groups of 4 or 5 students will hand in 1 assignment on the following case study. Reports will be written based on the structure presented on Week 6, written with Arial 12-point font, 1" margins, single-spaced at a maximum of 3,000 words.

Due Date
Feb 27   Tom.com: Valuation of an Internet Company (course kit)

Mar 20   Netflix Inc.: Streaming Away from DVDs (course kit)

Examination: A closed-book final exam of about 3 hours duration will account for **40%** of the final grade. This exam is to be an individual effort and there is no makeup exam in this course. A practice exam will be posted on the course online system in the last week of class. The University's Registrar's office sets specific examination dates after the term begins and enrolment patterns are identified. Students should not make plans to be away from Toronto during any portion of the announced examination period until the dates for their specific examinations have been announced.

Calculation of Course Grade

The letter-grade system is the fundamental system of assessment of performance in undergraduate programs at York University. For information regarding the pass/fail option regulations, refer to the grading information available in your Faculty's section of the Undergraduate Calendar.

The corresponding grade points awarded for each grade are:

Grade	Grade Point	Percent Range	Description
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D	2	50 – 54	Marginally passing
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F	0	(Below 50%)	Failing

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is D (2). To keep final grades comparable across courses, the average course grade within a section of an undergraduate course is normally between 5.5 and 7.0.

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor.

For more details on the index, grading policy, and grade point average (GPA) requirements, see the Student Handbook or the Student Services & International Relations website:

http://schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Academic+Policies+BBA?OpenDocument

Academic honesty is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found in the Student Handbook and on the Student Services & International Relations website:

http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Academic+Honesty!OpenDocument

Accommodations. For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services.
For counseling & disability services, contact Student Services or see http://www.yorku.ca/cds/.

Exams (Absence from)
Final. Within 24 hours of missing a final examination, students must contact the <Associate Director, Undergraduate Programs Unit> at (416) 736-5060 and must also contact their course instructor. Formal,

original documentation regarding the reason for missing the exam must be submitted to the <Director of Student Services, Associate Director, Undergraduate Programs Unit> (SSB Room W262) within 48 hours of missing the final exam. Students who miss a final exam due to illness must have their doctor complete an "Attending Physician's Statement." For more details, see:

http://schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Enrolment+-+MBA+Exam+Schedule?OpenDocument

To: Faculty Council, Schulich School of Business
From: Pauline Shum-Nolan, Finance Area Coordinator
Date: March 16, 2023
Re: Proposed Course Changes – FINE 4400 3.0 – International Financial Management

Motion: That Faculty Council approve changes to the course title, course description and learning
         objectives of FINE 4400 3.0 – International Financial Management.

Rationale:

The current title, description and content of the course, while relevant, do not fully reflect the current and expected business conditions, which have been materially altered by the latest developments in international businesses and financial markets. With the more volatile and increasingly unpredictable conditions, we believe that having a strong understanding and good appreciation of risk management in international finance has become an increasingly important requirement for successful finance managers. The proposed changes should enable graduates to be better prepared to navigate in the challenging conditions in international finance.

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
Schulich BBA / iBBA Programs

2. Responsible Unit:
FINE

3. Subject Code (Rubric) and Course Number:
FINE 4400

4. Credit Value:
3.00

5. **Long Course Title:** *International Financial Management*

6. **Short Course Title:** *International Financial Management*

7. Type of Course Change(s) (indicate all that apply):

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

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

9. **Rationale:**

The current title, description and content of the course, while relevant, do not fully reflect the current and expected business conditions, which have been materially altered by the latest developments in international businesses and financial markets. With the more volatile and increasingly unpredictable conditions, we believe that having a strong understanding and good appreciation of risk management in international finance has become an increasingly important requirement for successful finance managers. The proposed changes should enable graduates to be better prepared to navigate in the challenging conditions in international finance. This course is currently active.

10.Proposed Course Information:
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

Existing Course Information (Change From):	Proposed Course Information (Change To):
Course Title: *International Financial Management*	Long Course Title: *Managing Risk in a Changing Global Environment* Short Course Title: *Managing Risk in a Changing World*
Brief Description As financial markets, business corporations and financial services have become increasingly global, investors, bankers and financial managers have increasingly faced complex issues associated with overseas transactions, international investments, fund raising in international capital markets and trade finance. Along with these cross-border activities come both additional opportunities and risks that competent managers would need to manage. This course applies financial and economic theory to the international financing and investment decisions of corporations, financial institutions and individual investors. Risk management and mitigations through use of exchange rate contracts and hedging will be examined. The various methods of transferring liquid assets and their constraints will be considered. Capital budgeting decisions and issues regarding capital structure, where the assets and sources of financing and international trade finance are in different economies, are also studied. International debt and equity markets and various alternatives from the perspective of issuers and investors will be discussed. An extension of the Capital Asset Pricing Model to an integrated world model is considered.	**Brief Description (60-word limit)** Investors and businesses with access to global markets often need to make decisions in response to unpredictable global changes and risks. In this practical course, we will discuss the major risk issues relevant to international markets and explore measures to manage and mitigate them. We will also cover topics such as valuation, trade finance and capital markets in international context.
Prerequisite: SB/FINE 3100 3.00.	**Prerequisite:** SB/FINE 3100 3.00.
Course Learning Outcomes	Course Learning Outcomes

This course aims to extend the key concepts from the fields of corporate finance and investments to an international environment. Firms are looking increasingly to trade and invest internationally in order to exploit profitable market opportunities and benefit from a growth in market share and economies of scale. With communication technologies and infrastructure improving, there are ever more opportunities for geographic expansion, easier access to overseas product markets and enlarged markets to raised capital internationally. These developments also mean that even domestic companies are not able to operate in isolation and be immune from international competition and issues. International diversification and the prospect of exploiting inefficiencies in less competitive markets are now major factors influencing the decisions of investment managers. The benefits of international trade and investments can, however, be at least partially offset by an increase in risk exposures related to operating in unfamiliar new markets, regulatory framework and foreign exchange risks. In addition, they may find overseas' profit streams subject to international taxation barriers or may not even be able to repatriate funds.

The key objective is to educate students and prepare them to face real life investment, operational and financing decisions involving countries, currencies and business conditions outside the Canadian borders. The skills imparted in this course are an essential element for finance managers involved in international investment decisions and investment analysts trying to optimize its portfolio. They will also understand the various risk factors and return expectation related to such decisions.

The work we do is applied case studies. At the end of this course, students should be able to:
- Appreciate the factors affecting stability of international monetary system and causes of financial crises.
- Understand the foreign exchange markets, how exchange rates are determined and hedging instruments available to reduce

This course aims to provide a comprehensive discussion, analysis and evaluation of risks areas and issues arising from international business and financial investments. It covers key decision-making needs in the fields of corporate finance and investments in an increasingly unpredictable international environment, taking into consideration recent developments that could affect these decisions. These developments also mean that even domestic companies are not able to operate in isolation and be immune from international competition and issues. International diversification and the importance of avoiding over-dependence on key enablers (supplies, labor and markets for businesses and market liquidity for investors) are now major factors influencing the decisions of business and investment managers. While these international business and investment decisions could by themselves be significant in enhancing their competitiveness and creating value, they come with risks that need to be thoroughly analyzed, adequately understood and effectively mitigated.

The key objective is to educate students and prepare them to understand and give due consideration to risks and mitigants when they face real life investment, operational and financing decisions involving countries, currencies and business conditions beyond the Canadian borders. . The skills acquired in this course are essential for investment analysts assessing risks in operating foreign assets and for finance managers involved in international investment decisions.

The topics discussed are practical and based on a combination of financial concepts, evaluation of recent developments and their implications and applied case studies. At the end of this course, students should be able to:
- Appreciate the risks and challenges involved in international business and investment decisions and mitigants available for effective management of these risks.
- Understand the foreign exchange markets, how exchange rates are determined and

exchange risks.

- Understand issues related to managing foreign exchange exposure.
- Appreciate the various international capital markets, including bond, and equity markets, bank lending and trade finance.
- Evaluate overseas investment project proposals through international capital budgeting and assessing cost of capital.

Topics as per current course outline

1. Introduction - Globalization and the Multinational Firm
   - Understand why it is important to study international finance.
   - Distinguish international finance from domestic finance.

2. International Monetary System and Balance of Payments
   - Introduce the institutional framework within which:
     - International payments are made.
     - The movement of capital is accommodated.
     - Exchange rates are determined.

   - Introduce components of the balance of payments:
   - Discuss how balance of payments data may be interpreted.

3. Foreign Currency Markets and Exchange Rate
   - Introduce the institutional framework within which exchange rates are determined.
     - Function and Structure of the FX Market
     - The Spot Market
     - The Forward Market
     - Exchange-Traded Currency Funds

hedging instruments available to reduce exchange risks.

- Appreciate the complexities of recent developments in international finance and the increasing geopolitical risks and unpredictability of the global operating environment.
- Apply the learning towards specific investment and business decisions such as market expansion, foreign direct investments and M&As.
- Apply the above acquired knowledge in the areas of financial forecasting and valuations, international trade finance and international capital markets.

Topics to be included in the revised course outline:

1. **Introduction: What makes Risk Management different for International Finance?**
   - Changes in value of foreign currencies could affect cash flows and asset value in foreign countries.
   - Changes in regulations and government interventions can affect the competitive landscape and positions against competitors.
   - Changes in international relations could create obstacles to investing, divesting, repatriating and exchanging funds.
   - All the changes mentioned above could be highly unpredictable and happen without warnings.
   - Hence, risk assessments, mitigation (to the extent feasible) and management are critical in managing business risks and in ensuring adequate risk-adjusted returns for investors.

Micro Levels – Hedging Transactions and Asset Values in international Investments

2. *Foreign Exchange Rates and Markets*
   - Foreign exchange spot and forward rate products, processes and market conventions
   - Understanding currency arbitrages
   - Introduction to foreign exchange derivatives (options and future markets)

4. International Parity Conditions
   - Discuss several key international parity relationships, such as interest rate parity and purchasing power parity.

   Currency Futures and Options
   - Building blocks of derivatives
     - Futures
     - Options
     - Swaps

5. The Impact of Exchange Rate variations on the Firm – Transaction Exposure
   - Managing Transaction Exposure to Exchange Rates
   - Various exposures to currency risk
     - What are Transaction exposures and how are they measured?
     - Tools available to firms to manage Transaction exposure

6. The Impact of Exchange Rate variations on the Firm – Economic Exposure
   - Managing Economic Exposure
     - Measuring economic exposure
     - Discusses its determinants and presents methods for managing and hedging economic exposure.

7. Cost of Capital for International Projects
   - Measuring the Cost of Capital Across Countries
     - Segmented vs. integrated markets.
     - Cross-border listings of stocks and foreign Equity ownership restrictions

8. International Capital Budgeting
   - Evaluating International Capital Budgeting
     - Review of domestic capital budgeting
     - Adjusted present value approach.

   - Application of Capital Budgeting by Case Analysis
     - Discussions of typical trade transactions, key players, terms,

3. **Interest Rate Parity and Exchange Rate Forecasting**
   - Theories and practices of interest rate parity and purchasing power parity.
   - Law of One Price and Arbitrage Equilibrium.
   - Understanding interest rate risks, implications on currency and asset values.

4. **Hedging Transaction Exposure**
   - What is transaction exposure?
   - Hedging with Financial Contracts: Forward, Money Market, and Option Contracts.
   - Hedging with Operational Techniques.
   - Exposure Netting techniques.

5. **Hedging Economic Exposure and Impact to Financial Forecasting**
   - Changes in exchange rate could affect fundamental value of a foreign asset or investment in two ways: 1. Change in value of asset/investment by affecting its competitiveness and profit margins. 2. Change in value of the asset/investment when exchanged back to home country's currency.
   - Managing operating exposure by changing operating strategy
   - Measuring economic exposure and financial hedging techniques to reduce risk.

Macro Levels and Impact of Current Affairs

6. **Imbalances and financial crises – Reading from the Tell-Tale Signs**
   - Balance of Payments, capital flows, and impact to exchange rates
   - Exchange rate regimes and policies
   - Financial bubble building and bursting that lead to financial crises.
   - Case: Thailand 1995, Managing credit risk at the start of Asian Financial crisis.

7. **Understanding Developments in International Finance – Globalization at a Crossroad**

processes, risks and financing instruments, and how they all work.
 	
9. International Bond Markets and International Equity Markets
  - Discussion of international capital markets
    • Structure of the bond markets
    • Primary and secondary equity markets throughout the world.
 	
10.   International Trade Finance
  - The function, processes and operations of trade finance.
  - How trade finance helps to facilitate international trade transactions.
 	
11.   International Portfolio Management
  - Portfolio diversification internationally
    • The effects of fluctuating exchange rates on international portfolio investments.
    • Benefits from diversification
    • Reasons for "home bias" in portfolio holdings.
 	
12. Foreign Direct Investments (FDI) and Cross-Border Acquisitions
 	
  - Issues associated with FDI by MNCs:
    • Global Trends in FDI
    • Why Do Firms Invest Overseas?
    • Cross-Border Mergers and Acquisitions
  - Political Risk and FDI
	- *Pre-Financial Crisis Increasing Globalization (1970s to 2009)* – Stimulated by 1. Advancements in processing and communication technologies, 2. Expansion of international Financial Markets, 3. Drive for scale economies and cost efficiency, 4. Market Diversification and expansion, and 5. Expanding international trade as countries embraced the theory of competitive advantage.
	- *Increasing Risk Awareness and Cautiousness (2010-2017)* – Driven by 1. U.S. Financial crisis (2008-2009) and European Debt Crisis (2010-2012), 2. Low interest rates resulting from quantitative easing, 3. Increasing bank and financial market regulations and investor protection.
	- *Geopolitical Polarization (2017 – Present)* – Resulted from 1. U.S.-China trade dispute, 2. Two competing allied groups emerging (U.S.-led democratic countries vs Russia-China), 3. Increasing aggressiveness between the groups (Ukraine invasion and related sanctions in Europe and Taiwan Strait tension in Asia), 4. Covid-pandemic and resulting disruptions of supply chains and international trade.
	- *What's going to be next?*
	
	8. Political Risks in Capital Investments and Foreign Direct Investments
	- Government Default Risk
	- Other Sovereign Risk issues (Expropriation, nationalization, taxation, currency control, obstacles against investment or re-patriation)
	- Legal and Regulatory Risks (Risk of Governments changing their rules, their interpretations and/or implementations could hurt foreign investors' interests, weaken enforceability of contractual rights and intellectual property protections)
	- Risks of being caught in geopolitical disputes (e.g. McDonalds having to close 800 restaurants in Russia)

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<mark>financing into Weighted Average Cost of Capital (WACC) assumptions (e.g. Market Risk Premium, beta and cost of debt etc.)</mark>
- <mark>Scenarios and sensitivity analysis.</mark>

11. Specific Topic 2: International Trade Finance – Practices and Risks.
- A Solution to facilitate and manage transaction risks in international trade
- Parties involved and processes involved.
- How can these risks be mitigated?
- Creation of short-term money market.

12. Specific Topic 3: International Bond and Equity Markets (optional)
- Overview of International Bond and Equity Markets
- Investment products and instruments available.
- Risks in international equity market – Market volatility and liquidity (or lack thereof)
- Risks in international bond market – Enforceability of lenders' rights, challenges in dispute resolution and reliability of domestic credit ratings.

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11. Enrolment Notes:
Maximum number of students: 45

12. Consultation:
 Consultations with the Finance Area meeting chaired by Professor Pauline Shum Nolan (Area Coordinator) and Professor Lilian Ng (previous course Director) in preparing the documents.

Originator:

Signature   Date

Gregory Pau / Lilian Ng   Finance
Name   Area or Specialization

V. July 2021

Approvals:

Area or Specialization

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

Pauline M. Shum Nolan	March 16, 2023
Signature	Date

Pauline M. Shum Nolan	Finance
Name	Area or Specialization

Degree Program:

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Programs
Name of Program Director	Program

Program Committee:

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

Mike Valente	April 28, 2023
Signature	Date

Mike Valente	BBA/iBBA Program Committee
Name of Committee Chair	Committee

V. July 2021

FINE 4400 3.0: Managing Risk in a Changing Global Environment

Course Outline
Fall 2023
To be determined.

Instructor
Gregory Pau
Office location: N204M, Seymour Schulich Building
Phone: (647) 9293735
E-mail: gpau@schulich.yorku.ca

Program Assistant
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Formerly SVP, Corporate Ratings at DBRS Ltd., Gregory has credit risk assessment, adjudication and management experience in banks and rating agencies in Hong Kong, Singapore and Canada since graduated with a Schulich MBA in 1989. Gregory is also a member of User Advisory Council of the Canadian Accounting Standards Board. Gregory has been teaching elective courses at Schulich for the past seven years including Corporate Finance Analysis, International Financial Management and Investment Banking.

Brief Description
Investors and businesses with access to global markets often need to make decisions in response to unpredictable global changes and risks. In this practical course, we will discuss the major risk issues relevant to international markets and explore measures to manage and mitigate them. We will also cover topics such as valuation, trade finance and capital markets in international context.

Prerequisite: SB/FINE 3100 3.00.

Contents

Course Learning Outcomes

As financial markets and business corporations have become increasingly global, investors, bankers and corporations' financial managers have faced complex issues associated with cross-border transactions, international investments, fund raising in international capital markets and trade finance. More recently, numerous unexpected events and developments (such as global pandemic, increasing geopolitical

tensions and military conflicts in Ukraine) have added significant unpredictability and risks to all participants involved in international finance.

This is a practical course that discusses and analyzes risks involved in international finance and businesses, how these risks could adversely affect value of investments and corporations, and how could investors and business managers manage and mitigate such risks. The course will discuss risk management challenges faced by market participants from both macro and micro levels. On the micro level, the course explores how values of transactions and assets could be affected by exchange rate and interest fluctuations and alternatives to hedge and reduce such risks. On the macro level, the course evaluates the various causes of financial crises and recent developments affecting global operating conditions for businesses and market conditions for investors. With that understanding, the course moves on to discuss various sources of risks facing corporate managers who consider making overseas market expansions, investments and/or acquisitions and hedging alternatives available. The course will also cover some specific topics covering valuation and forecasting, trade finance and capital markets in international context.

The key objective is to educate students and prepare them to understand and give due consideration to risks and mitigants when they face real life investment, operational and financing decisions involving countries, currencies and business conditions beyond the Canadian borders. The skills acquired in this course are essential for investment analysts assessing risks in operating foreign assets and for finance managers involved in international investment decisions.

The topics discussed are practical and based on a combination of financial concepts, evaluation of recent developments and their implications and applied case studies. At the end of this course, students should be able to:
• Appreciate the risks and challenges involved in international business and investment decisions and mitigants available for effective management of these risks.
• Understand the foreign exchange markets, how exchange rates are determined and hedging instruments available to reduce exchange risks.
• Appreciate the complexities of recent developments in international finance and the increasing geopolitical risks and unpredictability of the global operating environment.
• Apply the learning towards specific investment and business decisions such as market expansion, foreign direct investments and M&As.
• Apply the above acquired knowledge in the areas of financial forecasting and valuations, international trade finance and international capital markets.

Deliverables at a Glance

Students are expected to do the reading assignments before class, actively participate in class discussions and complete the following written assignments and quizzes. In the table below, the contribution of each task to your final grade for the course is the "% Weight" column.

Assignment/Task	% Weight	Author
Group Presentation	20	Group
Quizzes (4 x 5% each)	20	Individual
Mid-term	30	Individual
Final Exam	30	Individual
	100%	

For details, see "Quizzes, Group Presentation, Mid-term and Final Exam: Descriptions" on page 4.

Course Materials

Textbook:

As this is a practical course, course materials are predominantly based on class slide presentation, current news and analysis on international events, risk management and financial market issues. Sources of such information could include (but not limited to) The Economist, Financial Times, Euromoney, and The Wall Street Journal.

A useful reference book, which can provide some useful explanations of concepts and issues would be: Eun, Cheol S., Bruce G. Resnick and Tuugi Chuluun. ***International Financial Management. Ninth Edition***. McGraw-Hill Education, 2020. ISBN 978-1-260-57531-6.

However, the course will NOT follow or be limited to the reference book because, in Risk Management as well as International Finance, a risk management professional's ability to identify, analyze and assess the implications of international events are often more important than just understanding international financial theories. Other handouts, such as problem sets, cases, class materials, and course slides will be available on the course materials database (Canvas) throughout the course.

Go to http://www.library.yorku.ca, click on the "Reserves" tab and type in "FINE 4400" to access these readings. There will be a listing of books on reserve and the readings for the course that can be read online.

Course Materials Database (Canvas)

The Canvas has been created within Schulich's Lotus Notes. It contains general information for Schulich students and information and materials specific to this course. Check it frequently.

Course related guides for FINE 4400 on the library database provide links to selected databases that will be important in completing your assignments.

Student Preparation for Class and Class Participation: Expectations

Preparation: All Students are expected to review the slide presentations for the lectures and be prepared with a list of issues for clarification during class. Since there are lots of materials to cover in each class, students' pre-class preparation is crucial to maximize their understanding and application of concepts in real-life cases. The required readings before each class are summarized in the "Class-by-Class Syllabus" and "Quick Reference" sections in this course outline. **If for whatever reason you miss any class, it is your responsibility to get review the materials and any announcements that you miss.** In addition, you should have a calculator when viewing any of the recorded lectures so that you can participate in working through in-class numerical problems. If the class materials and class discussions were not adequately clarified those issues, you are encouraged to email me to address the issues.

Class Participation: Class participation and contribution during class are important elements of the learning process in this course. Active class discussions during the Sessions often provide more insight into the learning.

Class-by-Class Syllabus

Please refer to the "Quick Reference: Summary of Classes, Activities and Deliverables" section on page 7 for details.

Quizzes, Group Presentation, and Individual Assignments: Descriptions

Short Quizzes:

There are four short quizzes, each worth **5%** of the total marks, which also offer opportunities for you to receive feedback and monitor your progress. The quizzes are to be done **individually**. Further details of the accessibility and submission of the quizzes through Canvas will be discussed in the relevant classes.

Due dates and coverage of homework and quizzes are summarized as follows:

Tasks	Durations (minutes)	Quiz Date	Coverage
Short Quiz 1	25	Class 3	Materials in Classes 1 & 2
Short Quiz 2	25	Class 6	Materials in Classes 3-5
Short Quiz 3	25	Class 9	Materials in Classes 6-8
Short Quiz 4	25	Class 11	Materials in Classes 9-10

Mid-term Class 7

Mid-term will cover the first half of the course (all materials covered in classes 1-5) and will count for 30% of total marks. The Test will be a combination of short questions that evaluate your understanding of the concepts discussed, ability to make certain computations discussed in class and to apply them in real-life situation facing finance managers or investment analysts. Formulae sheets will be provided on Canvas. Mid-term will account for 30% of the marks.

Group Presentation Class 8

Group Presentation: *Current News Related to Risk Management in International Finance*

Students are asked to form groups of 5 or 6 and to provide a group presentation regarding a current event related to Risk Management in International Finance (due at the beginning of Class 8). In addition, the Group will present findings and conclusions in a 15-minute presentation during Class 8. The Group will work together, and all members will receive the same grade. The presentation will count for 20% of total marks.

Each group will choose one **current** news event relating to risk management in international finance based on your own research from the Internet or from current periodicals and newspapers. You need to provide the source of your information and prepare a presentation to discuss the following:
- A brief discussion of the event itself
- Identify key international finance-related issues and why they are relevant and significant to risk management of a company or party you represent.
- The Group's interpretation of the impact or consequences of the events to the party (or company) concerned.
- The Group's recommendation on what the company or party affected should do to mitigate or reduce the impact.

Presentation slides will have to be emailed to me at least a day earlier so that they can be posted on the course webpage (Canvas) for viewing.

Final Exam
To be
Determined

Final Exam will cover the second half of the course (all materials covered in classes 6-12) and will count for 30% of total marks. The Final Exam will be a combination of short questions that evaluate your understanding of the concepts discussed, ability to make certain computations discussed in class and to apply them in real-life situation facing finance managers or investment analysts. Formulae sheets will be provided in Canvas.

Calculation of Course Grade

The course grading scheme for Bachelor's level courses at Schulich uses an 8-value grade-point system. The possible course letter grades for a course (and the corresponding grade points awarded for each grade are:

A+	9 grade points
A	8
B+	7
B	6
C+	5
C	4
D+	3
D	2
F	0

After each assignment or task (as outlined in the "Deliverables At a Glance" section on page 2 of the course outline, each student will receive an **Adjusted Numeric Score** (out of a total of 100 marks). The adjusted numeric score is calculated from each student's raw number score based on the following formula:

Adjusted Numeric Score = Raw Numeric Score X 75 / Class Average Raw Score

Each student will also receive a letter grade for the assignment or task based on the following mapping scheme:

Letter Grade	Adjusted Numeric Score
A+	More than 85.0
A	80.0 – 84.9
B+	75.0 – 79.9
B	70.0 – 74.9
C+	65.0 – 69.9
C	60.0 – 64.9
D+	55.0 – 59.9
D	50.0 – 54.9
F	Less than 50.0

At the end of the course, the Final Grade of a student will be based on the weighted average of all Adjusted Numeric Score and the above mapping scheme. Students whose Adjusted Numeric Score is close to the upper end of the range above may be considered for a one-notch upgrade if, in the opinion of the instructor, **both** the following two criteria are met: (1) the Adjusted Numeric Score is within 0.5 lower than the upper end of the range; and (2) the student's Adjusted Numeric Scores for the Mid-term and Final Exam (Individual Tasks) are materially higher than those in the other Group Tasks.

General Academic Policies: Grading, Academic Honesty, Accommodations and Course Works

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor.

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

Academic honesty is fundamental to the integrity of university education and degree programs and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found on the **Schulich** website:

http://schulich.yorku.ca/current-students/academic-honesty/

***Accommodations*.** For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services.
For counseling & disability services, contact Student Services or see http://www.yorku.ca/cds/.

Exams (Absence from)

Midterm
Students who miss the mid-term examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence*. Instructors may request that students submit a copy of their documentation to Student & Enrolment Services. Accommodations and/or re-scheduling of the mid-term exam will be left to the discretion of the course instructor with the expectation that the case be resolved within 14 calendar days.

Final Exam
Within 24 hours of missing a final examination, students must contact their course instructor. Students must also submit a completed Deferred Standing Request Form within 48 hours online. Formal documentation* (e.g. Counselor's Statement, death certificate, etc.) regarding the reason for missing the exam must be submitted electronically via file upload as part of the form. The Deferred Standing Request form can be found at https://schulich.yorku.ca/exam-deferralLinks to an external site.. Student & Enrolment Services will notify the instructor and copy the student by email if appropriate documentation has been received.

For full details regarding exam deferrals, consult the Undergraduate Academic Handbook (pg.30) and/or the Graduate Policy Handbook (pg. 23).

* Currently, students are not required to submit a doctor's note or an Attending Physician's Statement in support of missed midterms, exams and/or requests for deferred standing for courses impacted by the COVID-19 situation. If you haven't already done so, we strongly encourage you to connect with your course instructor(s) first to make other arrangements to complete outstanding work, as a deferred standing may not be necessary.

Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Date and Main Topics	Detailed Topic(s)
1. Introduction: What makes Risk Management different in an international contest?	- Changes in value of foreign currencies could affect cash flows and asset value in foreign countries. - Changes in regulations and government interventions can affect the competitive landscape and positions against competitors. - Changes in international relations could create obstacles to investing, divesting, repatriating and exchanging funds. - All the changes mentioned above could be highly unpredictable and happen without warnings. - Hence, risk assessments, mitigation (to the extent feasible) and management are critical in managing business risks and in ensuring adequate risk-adjusted returns for investors.
Micro Levels – Hedging Transactions and Asset Values in international Investments	
2. Foreign Exchange Rates and Markets	- Foreign exchange spot and forward rate products, processes and market conventions - Understanding currency arbitrages - Introduction to foreign exchange derivatives (options and future markets)
3. Interest Rate Parity and Exchange Rate Forecasting	- Theories and practices of interest rate parity and purchasing power parity. - Law of One Price and Arbitrage Equilibrium. - Understanding interest rate risks, implications on currency and asset values. - Darden Case – Dozier (Case to be reviewed)
4. Hedging Transaction Exposure	

Class No., Date and Main Topics	Detailed Topic(s)
	- What is transaction exposure? - Hedging with Financial Contracts: Forward, Money Market, and Option Contracts. - Hedging with Operational Techniques. - Exposure Netting techniques.
5. Hedging Economic Exposure and Impact to Financial Forecasting	- Changes in exchange rate could affect fundamental value of a foreign asset or investment in two ways: 1. Change in value of asset/investment by affecting its competitiveness and profit margins. 2. Change in value of the asset/investment when exchanged back to home country's currency. - Managing operating exposure by changing operating strategy - Measuring economic exposure and financial hedging techniques to reduce risk.
Macro Levels and Impact of Current Affairs	
Imbalances and financial crises – Reading from the Tell-Tale Signs	- Balance of Payments, capital flows, and impact to exchange rates - Exchange rate regimes and policies - Financial bubble building and bursting that lead to financial crises. - Case: Thailand 1995, Managing credit risk at the start of Asian Financial crisis.
6. Understanding Developments in International Finance – Globalization at a Crossroad	- *Pre-Financial Crisis Increasing Globalization (1970s to 2009)* – Stimulated by 1. Advancements in processing and communication technologies, 2. Expansion of international Financial Markets, 3. Drive for scale economies and cost efficiency, 4. Market Diversification and expansion, and 5. Expanding international trade as countries embraced the theory of competitive advantage. - *Increasing Risk Awareness and Cautiousness (2010-2017)* – Driven by 1. U.S. Financial crisis (2008-2009) and European Debt Crisis (2010-2012), 2. Low interest rates resulting from quantitative easing, 3. Increasing bank and financial market regulations and investor protection. - *Geopolitical Polarization (2017 – Present)* – Resulted from 1. U.S.-China trade dispute, 2. Two competing allied groups emerging (U.S.-led democratic countries vs Russia-China), 3. Increasing aggressiveness between the groups (Ukraine invasion and related sanctions in Europe and Taiwan Strait tension in Asia), 4. Covid-pandemic and resulting disruptions of supply chains and international trade.

Class No., Date and Main Topics	Detailed Topic(s)
	- *What is going to be next?*
	No Class – Reading Week
7.	**Mid-term**
8. Political Risks in Capital Investments and Foreign Direct Investments	**Group Presentation** - Government Default Risk - Other Sovereign Risk issues (Expropriation, nationalization, taxation, currency control, obstacles against investment or re-patriation) - Legal and Regulatory Risk issues (Risk of Governments changing their rules, their interpretations and/or implementations could hurt foreign investors' interests, weaken enforceability of contractual rights and intellectual property protections) - Risks of being caught in geopolitical disputes (e.g. McDonalds having to close 800 restaurants in Russia) - Information Risks (Difficulty in obtaining information due to different accounting standards, disclosure requirements and media control) - Business Practice Risks (corruptive business practices, inadequate health, safety and environmental standards, labour and strike risks) and Corruption Perceptions Index by Transparency International. - Credit and counterparty risks of local suppliers, customers/debtors and business partners. - Political risk mitigation techniques (Diversification, Exposure management, Insurance Coverage).
9. Operating Risks and Reactions by International Investors	- Disruptions of international exchanges and transactions (e.g. Requirement to comply with sanctions imposed, interruptions of supplies such as gas from Russia to Europe etc., expelling of Russia's access to SWIFT) - Increased inflation and financial market volatility resulting from the impact of the above disruptions. - Increased supply and market diversifications as businesses re-strategize their priorities of security of supplies over cost of supplies - International capital flows reflect that investors are more willing to sacrifice returns to reduce investment risks.
10.	

Class No., Date and Main Topics	Detailed Topic(s)
Specific Topic 1: Financial Forecasting and Enterprise Valuation in International Businesses	- Factoring exchange and cross-border risks into key operating assumptions (Revenue, Costs, asset value and competitiveness) in forecasting and valuation. - Assessing potential obstacles to access company funds or assets due to restrictive regulations, ESG issues and/or market disruptions. - Factoring the differences in risks of international businesses and of overseas financing into Weighted Average Cost of Capital (WACC) assumptions (e.g. Market Risk Premium, beta and cost of debt etc.) - Scenarios and sensitivity analysis.
11. Specific Topic 2: International Trade Finance – Practices and Risks	- A Solution to facilitate and manage transaction risks in international trade - Parties involved and processes involved. - How can these risks be mitigated? - Creation of short-term money market
12. Specific Topic 3: International Bond and Equity Markets (optional)	- Overview of International Bond and Equity Markets - Investment products and instruments available. - Risks in international equity market – Market volatility and liquidity (or lack thereof) - Risks in international bond market – Enforceability of lenders' rights, challenges in dispute resolution and reliability of domestic credit ratings.

MEMO

To: Kevin Tasa, Associate Dean Academic, Schulich School of Business

From: Julian Scott Yeomans, Professor, Director MBAN & MMAI Programs

Re: MBAN Minor Program Change, Replace PHIL 5340 with SUST 5100

Date: April 30, 2023

Motion:
That Faculty Council approve the replacement of the course *GS/PHIL 5340 3.00 Ethics and Societal Implications of Artificial Intelligence* with the course *SB/SUST 5100 3.00 Ethics and Technology* in the Master of Business Analytics (MBAN) Program.

Rationale:
Since its inception in 2019, students in the MMAI program have been required to take the ethics-based course, *GS/PHIL 5340 3.00 Ethics and Societal Implications of Artificial Intelligence*. PHIL 5340 is a course that has been provided and staffed by Liberal Arts and Professional Studies (LAPS) for students in specific Schulich and Lassonde graduate programs. During the current 2022-23 academic year, the ethics course was added as a requirement for students in the MBAN program, also. Given the number of students now enrolled in both the MBAN and MMAI, LAPS encountered issues this current year in staffing the course to accommodate our needs. The number of students entering the MBAN and MMAI in the coming 2023-24 academic year will significantly exceed that of the current year and the resourcing constraints will continue to be problematic.

A new, Schulich-based ethics course has been developed for the recently created Master of Business Administration in Technology Leadership (MBAt) degree. This course is SB/SUST 5100 3.00 Ethics and Technology. In addition to a substantial examination of the ethics of AI, this course further explores the ethical dimensions of numerous other technologies as applied to business & society. Hence, the SUST 5100 course better meets the more comprehensive curricular needs for graduate business students in both the MBAN and MMAI programs. Furthermore, SUST 5100 is also offered & staffed "in-house" at Schulich and is more readily scalable to meet the resourcing needs reflected by the increasing number of students enrolling in the programs.

Consequently, this motion aims to shift the responsibilities for providing the ethics course requirements in the MBAN & MMAI from one faculty (LAPS) to another (Schulich) by directly substituting SUST 5100 for PHIL 5340. To enable this proposed change, extensive consultations have been undertaken to ensure that the transformation is universally agreeable, feasible, and acceptable amongst all the impacted parties – namely with LAPS, Lassonde, and the Sustainability Area.

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

1. Program/ Diploma/Certificate:

Master of Business Analytics (MBAN)

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

The change will become effective during the 2023-24 Academic Year.
The course will be scheduled in the Winter 2024 term.

3. Proposed Change(s) and Rationale:

a. A description of the proposed modification(s) and rationale, including alignment with academic plans.

The proposed modification is to directly substitute the course *GS/PHIL 5340 3.00 Ethics and Societal Implications of Artificial Intelligence* with the course *SB/SUST 5100 3.00 Ethics and Technology* in both the MMAI and the MBAN. By directly replacing PHIL 5340 with SUST 5100, this will shift the responsibility for supplying the ethics course requirement from LAPS to Schulich.

SUST 5100 3.00 is a Schulich-based ethics course that was created for the new Master of Business Administration in Technology Leadership (MBAt) degree. In addition to considerable coverage of the ethics of AI, this course further examines the ethical dimensions of numerous other technologies used in business & society. Consequently, SUST 5100 better meets the comprehensive curricular requirements for graduates of both the MBAN and MMAI.

MMAI students have been required to take the ethics of AI course, PHIL 5340, since the program began in 2019. This ethics of AI course was added as a requirement for MBAN students in current academic year. Given the current number of MBAN and MMAI students, LAPS encountered resource issues during the current year for offering the course to our students. This resource issue will not disappear in subsequent years, since the number of students entering the MBAN and MMAI in the coming 2023-24 academic year will exceed that of the current year. Since SUST 5100 is offered "in-house" by

Schulich, its availability can be more readily controlled and scaled to accommodate the anticipated numbers of students admitted to both programs.

b. An outline of the changes to requirements and the associated learning outcomes/objectives, including how the proposed requirements will support the achievement of program/ diploma/certificate learning objectives.

The proposed change is for a specific substitution of the AI-focused ethics course, PHIL 5340, with the more comprehensive ethics course, SUST 5100. It represents a direct replacement of one course in the programs with another. While PHIL 5340 examines only the ethics of AI, SUST 5100 analyzes the ethical dimensions of not only AI but also numerous other relevant technologies that are readily employed throughout business and society. Consequently, SUST 5100 more comprehensively achieves the desired ethical curricular requirements for graduates from both the MBAN and MMAI.

c. An overview of the consultation undertaken with relevant academic units and an assessment of the impact of the modifications on other programs/ diplomas/certificates.

Comprehensive consultations have taken place with LAPS, Lassonde, and the Sustainability Area to ensure that the proposed course transformation can occur in a fashion which is feasible and acceptable to all. The Sustainability Area, together with the specific instructor, have agreed to provide the course for the MMAI and MBAN. The respective Associate Deans for LAPS and Lassonde also support the change. Transcripts and correspondence indicating these various acceptances appear below.

d. A summary of any resource implications and how they are being addressed.

The change will not require additional material resource implications.

e. A summary of how students currently enrolled in the program/ diploma/certificate will be accommodated.

The course change will apply to the incoming cohorts of the MMAI & MBAN programs – both of which start in the summer term. Hence, it is a straightforward course switch that will have an imperceptible impact on them.

For any students from prior cohorts who might have taken a leave-of-absence and have returned to complete their programs, they would now be

required to take the SUST 5100 course in place of the previous PHIL 5340 course.

4. Calendar Copy:

Existing Program/ Diploma/Certificate Information (Change From):	Proposed Program/ Diploma/Certificate Information (Change To):
MBAN PROGRAM Term 1 (Summer) MMAI 5000 3.00 Artificial Intelligence Fundamentals MMAI 5100 3.00 Database Fundamentals MBAN 6110 3.00 Data Science I OMIS 6750 3.00 Project Management MGMT 6300 3.00 Case Analysis and Presentation Skills Term 2 (Fall) MBAN 5110 3.00 Predictive Modelling MBAN 6120 3.00 Data Science II MBAN 6090 6.00 Analytics Consulting Project OMIS 6000 3.00 Models & Applications in Operational Research Plus 3.00 credits of Elective Courses NOTE: MBAN 6090 6.00 spans Terms 2 and 3. Students will enrol in Fall and continue the course in Term 3 (Winter). Term 3 (Winter) MBAN 5140 3.00 Visual Analytics and Modelling MBAN 6090 6.00 Analytics Consulting Project ~~GS/PHIL 5340 3.00 Ethics and Societal Implications of Artificial Intelligence~~ Plus 6.00 credits of Elective Courses	**MBAN PROGRAM** Term 1 (Summer) MMAI 5000 3.00 Artificial Intelligence Fundamentals MMAI 5100 3.00 Database Fundamentals MBAN 6110 3.00 Data Science I OMIS 6750 3.00 Project Management MGMT 6300 3.00 Case Analysis and Presentation Skills Term 2 (Fall) MBAN 5110 3.00 Predictive Modelling MBAN 6120 3.00 Data Science II MBAN 6090 6.00 Analytics Consulting Project OMIS 6000 3.00 Models & Applications in Operational Research Plus 3.00 credits of Elective Courses NOTE: MBAN 6090 6.00 spans Terms 2 and 3. Students will enrol in Fall and continue the course in Term 3 (Winter). Term 3 (Winter) MBAN 5140 3.00 Visual Analytics and Modelling MBAN 6090 6.00 Analytics Consulting Project **SB/SUST 5100 3.00 Ethics and Technology** Plus 6.00 credits of Elective Courses

Hello everyone,

I am now able to confirm that we are planning to bring the ethics and AI course in-house. We discussed options for possibly holding spots for Lassonde students, and that idea was not considered feasible due to the fact that our MMAI and MBAN programs have reached capacity. We cap our graduate level courses at 55 and both of those programs have an incoming class of at least that number.

So, it looks like the best option is to ask the PHIL department to staff that course again. Sorry I can't be of more help.

Thanks, Kevin

_____

Kevin Tasa, PhD
Associate Dean, Academic
Associate Professor of Organizational Behaviour
Schulich School of Business, York University

From: Lassonde Associate Dean Academic Students (ADAS) <adas@lassonde.yorku.ca>
Date: Thursday, March 16, 2023 at 8:46 AM
To: Kevin Tasa <ktasa@schulich.yorku.ca>
Cc: Associate Dean Research and Graduate Studies LA&PS <adres@yorku.ca>, Vice Dean, Lassonde School of Engineering <ad.academic@lassonde.yorku.ca>
Subject: Re: PHIL 5340 Ethics and Societal Implications of AI

Dear Kevin

Thank you for this background and the information on the new course. A course in ethics is a requirement for recognition of the Lassonde masters by the Vector Institute.

So, would it be ok for me to forward the course description to the GPD for our program?

Thanks, Richard

Richard Hornsey (he/him)
University Professor, Associate Dean Academic and Students
Lassonde School of Engineering
York University, Toronto

On Mar 15, 2023, at 4:30 PM, Kevin Tasa <ktasa@schulich.yorku.ca> wrote:

Hi everyone,

Ravi, thanks for forwarding those documents pertaining to this course. The Dean, the program director, and myself are all new to our roles and those docs helped fill in some gaps. Below is an update on things I have learned and which we can discuss next week.

I talked to current and past program directors of the Master of Management of Artificial Intelligence program to understand their views about the course. The program director pointed me to a new course that was just approved for our upcoming MBA in Technology Leadership (see attached). This course will be offered next year in the MBAt program, and the PD thinks it is superior to the current offering in the PHIL department. We are considering the option of dropping the PHIL course and adding the in-house course to the list of required courses in MMAI and MBAN programs.

Richard and Dan, I realize that if we pull back from the PHIL course it might negatively effect some of your students, especially in COSC. We are open to the idea of holding spots for your students if it is decided that the course is a reasonable substitute.

The other structural impediment to consider is that the MMAI program is no longer running from Fall to Summer. This coming summer we will begin the change to a Summer to Winter schedule, which eliminates the need for a Fall section of the PHIL course for Schulich students. If we were to continue our support of the PHIL course it would only be necessary in the Winter semester.

Happy to discuss this next week and find a solution that works.

Cheers, Kevin

Kevin Tasa, PhD
Associate Dean, Academic
Schulich School of Business, York University

From: Associate Dean Research and Graduate Studies LA&PS <adres@yorku.ca>
Date: Monday, March 13, 2023 at 2:19 PM
To: Kevin Tasa <ktasa@schulich.yorku.ca>, Lassonde Associate Dean Academic Students (ADAS) <adas@lassonde.yorku.ca>, Vice Dean, Lassonde School of Engineering <ad.academic@lassonde.yorku.ca>
Cc: Executive Administrative Assistant Dean Lassonde School of Engineering <execadmin@lassonde.yorku.ca>
Subject: Re: PHIL 5340 Ethics and Societal Implications of AI

Thanks both,

My assistant is Ives Polking: ipolking@yorku.ca

I'll look forward to speaking with you.

Best, Ravi

_____

Ravi de Costa (*he / him*)
Associate Dean, Research and Graduate
Faculty of Liberal Arts & Professional Studies

YORK UNIVERSITY
S900 Ross • 4700 Keele Street
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T 416.736.2100 x. 44569
adres@yorku.ca• www.yorku.ca

From: Lassonde Associate Dean Academic Students (ADAS) <adas@lassonde.yorku.ca>
Date: Monday, March 13, 2023 at 1:30 PM
To: Associate Dean Research and Graduate Studies LA&PS <adres@yorku.ca>, Kevin Tasa <ktasa@schulich.yorku.ca>, Vice Dean, Lassonde School of Engineering <ad.academic@lassonde.yorku.ca>
Cc: Executive Administrative Assistant Dean Lassonde School of Engineering <execadmin@lassonde.yorku.ca>
Subject: Re: PHIL 5340 Ethics and Societal Implications of AI

Hi Ravi

Apologies for not responding before your nudge. This falls across both Dan's and my portfolios as it concerns both academic programming and resourcing.

I've copied Lisa Henry in Lassonde's dean's office who can work with your assistant to set up a time to meet. In parallel, Dan and I can firm up Lassonde's position on the substance of the matter (although that may be influenced by whether this course continues to be a shared responsibility).

Best, Richard

Richard Hornsey (he/him)
University Professor, Associate Dean Academic and Students
Lassonde School of Engineering
York University, Toronto

From: Associate Dean Research and Graduate Studies LA&PS <adres@yorku.ca>
Date: Tuesday, March 7, 2023 at 17:58
To: Kevin Tasa <ktasa@schulich.yorku.ca>, Lassonde Associate Dean Academic Students (ADAS) <adas@lassonde.yorku.ca>, Vice Dean, Lassonde School of Engineering <ad.academic@lassonde.yorku.ca>
Subject: PHIL 5340 Ethics and Societal Implications of AI

Hello Kevin, Richard and Dan,

I'm a bit unclear on the division of labour in your Offices, so I hope I'm addressing the right people from your respective Faculties. Please do copy in others as needed.

I'm writing about a Philosophy course we have run for about three years, which I understand is a requirement for some of your students. It originates I believe from a donation to SSB, which included funds for a post-doc, who would also teach the course. I've attached the key files I have been able to locate.

That post-doc is ending in June but the need for the course continues, and we're now at the point of mounting courses for next year. So I'm hoping we can connect fairly soon to discuss how to move forward.

I've also gathered the historical enrolment data for our consideration below.

May I ask my assistant to work with yours to find us a time for this?

Best, Ravi
_____

Ravi de Costa (*he / him*)
Associate Dean, Research and Graduate
Faculty of Liberal Arts & Professional Studies

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W19
Fall – 30/60 (23 Schulich, 7 other programs) 5 COSC (Computer Science), 1 PHIL, 1 STS
Winter – 51/60 (46 Schulich, 5 other programs) 2 COSC, 2 PHIL, 1 VISA (Visual Arts)

FW20
Fall – 42/65 (57 Schulich, 8 other programs) 2 COSC, 1 HIST, 1 LAL (Linguistics), 4 PHIL
Winter – 43/65 (38 Schulich, 5 other programs) 1 COSC, 3 PHIL, 1 STS

FW21
Fall – 54/65 (46 Schulich, 8 other programs) 1 CIVL (Engineering), 2 COSC, 1 IST (ITEC), 4 PHIL
Winter 51/65 (46 Schulich, 5 other programs) 3 COSC, 2 PHIL

FW22
Fall – 53/65 (44 Schulich, 9 other programs) 5 COSC, 1 EECS (Electrical Engineering & Computer Science), 1 IST, 2 PHIL

Winter – 68/68 (60 Schulich, 8 other programs). 3 COSC, 1 INST (Interdisciplinary Studies), 4 PHIL

From: Geoff Kistruck <kistrugm@gmail.com>
Sent: March 24, 2023 12:36 PM
To: Kevin Tasa <ktasa@schulich.yorku.ca>
Cc: Julian Scott Yeomans <syeomans@schulich.yorku.ca>; Kathryn M. Doyle
<doyleka@schulich.yorku.ca>
Subject: Re: Ethics Course

We are willing to take on the two additional sections as the instructor we secured for the
MBAt section is willing to take on the additional two sections for MMAI/MBAN.

Geoff

Geoffrey M. Kistruck, PhD
RBC Professor in Social Innovation & Impact
Area Coordinator, Sustainability
Schulich School of Business, York University
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E: gkistruck@schulich.yorku.ca

SUST 5100 3.00: Ethics and Technology

Course Outline
Ethics and Technology
Fall, 2023

Time/Location: TBD

Instructor
Ron Srigley, PhD
G324 McEwen Building
416-736-5268

Assistant
Menglin Bai
G324 McEwen Building
416-736-5268
mbai@schulich.yorku.ca

Brief Description

This course explores the ethical underpinning of several technological issues including Artificial Intelligence, Privacy, Machine Replacement, etc. Students will seek to understand the implications of such technological developments on society, and to manage employees and organizations in a way that balances the tension between technological advancement and human ethics.

Prerequisites/Corequisites/Course Exclusions: No prerequisites required.

Course Learning Outcomes

Can technology be ethical? Owners, advocates, and developers assert that technology is the primary engine of human betterment in the contemporary world. Critics point to its menace for capitalism, politics, society, and human flourishing. This course joins the debate. It equips students with the tools to reflect on our current situation coldly and ethically. It aims to educate them about the origins of modern technology and the challenges it poses to contemporary societies. Areas of concern include business, politics, education, and biomedical science. The course culminates in the development of rigorous ethical assessments of and remedies for real-world technological practices and applications.

By the conclusion of the course, students will have learned to:

• Explain the difference between ancient and modern technology.
• Know the scientific, economic, and ideological sources of modern technology.
• Distinguish between technology as a tool and as a world view.

• Work creatively and critically with ethical theory.
• Understand the eugenic implications of biomedical science.
• Understand the social, political, and cognitive consequences of social and digital technology.
• Explain the history and logic of surveillance capitalism.
• Understand the effects of automation and AI on labour markets
• Complete an ethical assessment of and remedy for a real-world technological application.

There is no text or book for this course. Most of the material you need for this course will be available on our online learning platform called Canvas. Canvas contains the most up-to-date version of the readings, cases, and assigned questions for each class as current events may warrant a minor change in readings assigned from those listed on the syllabus. So please revert to Canvas (rather than the syllabus) for the most up-to-date preparation requirements.

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Student Preparation for Class and Class Participation: Expectations

We will use a variety of teaching methods to encourage intellectual understanding and a personal connection to the subject matter. Such methods include videos, group discussions, in-class exercises, presentations by guest speakers, and field interactions with social entrepreneurs.

Students are expected to read all assigned materials prior to class. Timely and comprehensive reading of the materials is not only important to ensure high quality interaction within classroom discussions/exercises, but also to ensure high quality dialogue with outside practitioners in relation to the real-world challenges they are facing. Students are also expected to be extremely courteous and highly professional in

their interactions with outside practitioners, and cognizant of their time and other constraints.

In addition to being prepared for class, it is important that students plan ahead for the successful completion of their major project. Some sub-components are not due until the latter part of the course yet require ongoing attention from the beginning of the course. It is the student's responsibility to ensure that they maintain regular progress in such endeavors.

Evaluation of Student Performance

COURSE ASSESSMENTS

1. Class participation:	20%
2. Ethical Project selection:	15%
3. Ethical Project Workshop:	25%
4. Ethical Project (written submission & presentation):	50%
	100%

DESCRIPTIONS OF COURSE ASSESSMENTS

1. *Class Participation* (20%) Student participation in class discussions, workshops, and collaborations.

2 – 4. *Ethical Project*: The major assignment for the course is a project that develops an ethical assessment of a technological application in one of the five areas examined in the course. The project is comprised of two parts. (1) An ethical assessment that engages the analysis developed in Part A of the course. (2) A remedy that addresses a real-world technological practice addressed in Part B of the course.

PHASES OF PROJECT:

2. *Selection & Justification* (15%): Students will select a particular practice/application and explain its ethical significance. (5-page report)

3. *Workshop* (25%): Students will workshop a draft of their project for comments and criticism from colleagues. Responses received will then be incorporated into final version of the project. (Power Point Presentation)

4. *Submission and Presentation* (25% & 25% =50%): Final versions of projects will be submitted and presented to the class. (15–20 pages)

All assignments are due on the date and time specified within the syllabus, and should be submitted via email to mbai@schulich.yorku.ca. A late penalty will be assigned (20%/day) for all assignments not submitted by the required date and time.

The course grading scheme for Master's level courses at Schulich uses a 9-value grade-point system. The possible course letter grades for a course (and the corresponding grade points awarded for each grade are:

A+   9 grade points
A   8
A-   7
B+   6
B   5
B-   4
C+   3
C   2
C-   1
F   0

Students are reminded that they must maintain a cumulative GPA of at least XX to remain in good standing and continue in the program, and a minimum of XX to qualify for their degree. Schulich grading guidelines mandate a section grade point average ['GPA'] of between XX and XX for core courses and a section GPA of between XX and XX for electives.

Academic Honesty

Academic honesty is fundamental to the integrity of university education and degree programs. The Schulich School will investigate and will act to enforce academic honesty policies where apparent violations occur. Students should familiarize themselves with York University's policy on academic honesty. It is printed in full in your student handbook and can also viewed on-line on the Schulich website, clicking through as indicated:

> Schulich website → 'Programs' → 'Master's Degree' → 'MBA Academic Honesty Policy'

While academic dishonesty can take many forms, there are several forms of which students should be highly aware because they are the ones that are most likely to occur in the context of a specific course.

- Plagiarism. Plagiarism is the presentation of information, ideas, or analysis generated by other people as being your own. It includes direct quotations as well as substantive paraphrases where the course of that information or idea is not clearly identified to the reader. Students should be careful to present their written work in a way that makes it completely clear in each and every case where a quotation, a paraphrase, or

an analysis is based on the work of other people. (This includes information from all sources, including websites.)

- Cheating. Cheating is an attempt to gain an unfair advantage in an evaluation. Examples of such violations include (but are not limited to) consulting prohibited materials during an examination or copying from another student.

- Failure to follow limitations on collaborative work with other students in preparing academic assignments. Each class differs in the mix of assignments and group-versus-individual preparation that is allowed. The instructor will make clear the extent of collaboration among students that is acceptable among students on various pieces of assigned work. Students should abide by those limitations and, if they are unsure about whether a certain level or form of collaboration would be acceptable, to clarify that question with the instructor in advance.

- Aiding and abetting. A student is guilty of violating academic honesty expectations if he/she acts in a way that enables another student to engage in academic dishonesty. If a student knows (or should reasonably expect) that an action would enable another student to cheat or plagiarize, that student's action constitutes an academic honesty violation. Illustrative examples include making your exam paper easily visible to others in the same exam or providing your own working or finished documents for an 'individual assignment' to another student (even if that other student said that he/she just wanted to 'get an idea of how to approach the assignment' or 'to check whether they had done theirs correctly').

- Use of academic work in more than one course. Generally, academic work done for every course is 'new' work, done for that course only. If a student wishes to use some or all of the academic work done for an assigned task in one course in another course, the student must get explicit, prior permission from both instructors so that they agree that the scope and nature of the overlapping use of that work is such that it can fairly be counted toward both courses.

Class-by-Class Syllabus

PART A: THE MAKING OF TECHOLOGICAL SOCIETY AND WHY IT MATTERS

Week	Subject	Readings
Week 1	*Origins of Technological Society*	Plato. *Republic* Appian, *The Third Punic War* Bacon, Francis. *The New Organon*

		Machiavelli, Niccolò. *The Prince*
		Von Neumann, "Can we Survive Technology?"
Week 2	*Classical ethical theory and its limitations*	Immanuel Kant, *On the Metaphysics of Morals* J.S. Mill, *Utilitarianism* Aristotle, *The Nicomachean Ethics* Aquinas, *Commentary of Aristotle's Nicomachean Ethics* Carol Gilligan, *In a Different Voice*
Week 3	*A New Framing the Ethical Problem Posed by Technological Society*	

PART B: THE ETHICAL CHALLENGES OF TECHNOLOGICAL SOCIETY

Week	Subject	Readings
Week 4	*AI, Automation, and Labour*	Pascale, Frank. "Secret Algorithms Threaten the Rule of Law" Penrose, Roger. *Shadows of the Mind* Zittrain, Jonathan. "The Hidden Costs of Automated Thinking"
Week 5	*Political and Social Integration & Fragmentation*	Lanchester, John. "You Are the Product: It Zucks!" Lanier, Jaron. *Ten Arguments for Deleting Your Social Media Accounts Right Now*

		Harari, Yuval Noah. "Why Technology Favors Tyranny"
Week 6	*Biology & Eugenics*	Kurzgesagt. "Genetic Engineering Will Change Everything Forever – CRISPR" Regalado, Antonio. "DNA tests for IQ are coming, but it might not be smart to take one"
Week 7	*Education and Stupidification*	Collini, Stephan. *What Are Universities For?* Smith, Justin. *The Internet Is Not What You Think It Is* Davies, William. "How many words does it take to make a mistake?"
Week 8	*The Ascendancy of Surveillance Capital*	Lewis, Michael. *Flash Boys* Zuboff, Shoshana. *The Age of Surveillance Capitalism*

C. CAN TECHNOLOGY BE ETHICAL? CASE STUDIES AND SOLUTIONS

Week	Subject	Reading
Week 9	*Workshopping draft proposals*	N/A
Week 10	*Legal Matters: Regulating Tech* Guest Speaker	TBD
Week 11	*Political Matters: The Case Sidewalk Labs Toronto*	TBD

	Guest Speaker	
Week 12	*Personal Matters: The Ascent of Transhumanism* Guest Speaker	TBD
Week 13	*Proposal Presentations*	N/A

REQUIRED READINGS

Appian, *The Third Punic War,* https://www.livius.org/sources/content/appian/appian-the-punic-wars/appian-the-punic-wars-27/#132

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MBAN 2023-24 Program Level Learning Outcomes

MBAN 2023-24 Program Level Learning Outcomes	OMIS 6750 Project Management	MBAN 6110 Data Science 1	MGMT 6300 Case Analysis & Presentation Skills	MMAI 5000 AI Fundamentals	MMAI 5100 Database Fundamentals	MBAN 5110 Predictive Modelling	MBAN 6120 Data Science 2	OMIS 6000 Models & Applications in Operational	Elective 1	MBAN 6090 Analytics Consulting Project	SUST 5100 Ethics and Technology	MBAN 5140 Visual Analytics & Modelling	Elective 2	Elective 3	MBAN 6090 Analytics Consulting Project
						Term 1 / Term 2 / Term 3									
1. Analytical Skills and Enhanced Decision-Making															
1.1. Apply big data analysis tools and techniques to enhance business decision making.	I	I		I	I	I	D	R		R					A
1.2. Design data-science solutions for problems commonly found in business.		I	I	I	I	I		R		A					A
1.3. Manage a business analytics project through all phases of the data science lifecycle.	I	I		I	I	R	A			R					A
1.4. Apply mathematical, statistical, and machine learning foundations of AI in the context of an evidence-based business decision support process.		I						R							
1.5. Apply strategic thinking skills to managerial decision making.	R									A	R	R			A
1.6. Recognize the limitations of theoretical models, techniques, and empirical findings.		I	I	I		R	D	A							
2. Professional Communication															
2.1. Prepare and deliver an effective and engaging oral presentation for both technical and non-technical audiences.	D		D							R		R			R
2.2. Prepare an effective and engaging written report for both technical and non-technical audiences.	D		D							R		R			R
2.3. Apply strategies to work effectively in interdisciplinary teams.	D	A									R				
3. Ethics & Social Responsibility															
3.1. Identify the ethical and social responsibilities related to the collection, analysis and reporting of the data.	I		I							R	A				R
3.2. Describe, analyze, and devise solutions for ethical and social issues that arise in business analytics.	I		I							R	A				R

I= Introduced, D= Developed, R= Reinforced, A= Assessed individually for Achievement

MEMO

To: Kevin Tasa, Associate Dean Academic, Schulich School of Business

From: Julian Scott Yeomans, Professor, Director MBAN & MMAI Programs

Re: MMAI Minor Program Change, Replace PHIL 5340 with SUST 5100

Date: April 30, 2023

Motion:
That Faculty Council approve the replacement of the course *GS/PHIL 5340 3.00 Ethics and Societal Implications of Artificial Intelligence* with the course *SB/SUST 5100 3.00 Ethics and Technology* in both the Master of Management in Artificial Intelligence (MMAI) Program

Rationale:
Since its inception in 2019, students in the MMAI program have been required to take the ethics-based course, *GS/PHIL 5340 3.00 Ethics and Societal Implications of Artificial Intelligence*. PHIL 5340 is a course that has been provided and staffed by Liberal Arts and Professional Studies (LAPS) for students in specific Schulich and Lassonde graduate programs. During the current 2022-23 academic year, the ethics course was added as a requirement for students in the MBAN program, also. Given the number of students now enrolled in both the MBAN and MMAI, LAPS encountered issues this current year in staffing the course to accommodate our needs. The number of students entering the MBAN and MMAI in the coming 2023-24 academic year will significantly exceed that of the current year and the resourcing constraints will continue to be problematic.

A new, Schulich-based ethics course has been developed for the recently created Master of Business Administration in Technology Leadership (MBAt) degree. This course is SB/SUST 5100 3.00 Ethics and Technology. In addition to a substantial examination of the ethics of AI, this course further explores the ethical dimensions of numerous other technologies as applied to business & society. Hence, the SUST 5100 course better meets the more comprehensive curricular needs for graduate business students in both the MBAN and MMAI programs. Furthermore, SUST 5100 is also offered & staffed "in-house" at Schulich and is more readily scalable to meet the resourcing needs reflected by the increasing number of students enrolling in the programs.

Consequently, this motion aims to shift the responsibilities for providing the ethics course requirements in the MMAI from one faculty (LAPS) to another (Schulich) by directly substituting SUST 5100 for PHIL 5340. To enable this proposed change, extensive consultations have been undertaken to ensure that the transformation is universally agreeable, feasible, and acceptable amongst all the impacted parties – namely with LAPS, Lassonde, and the Sustainability Area.

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

1. Program/ Diploma/Certificate:

Master of Management in Artificial Intelligence (MMAI)

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

The change will become effective during the 2023-24 Academic Year.
The course will be scheduled in the Winter 2024 term.

3. Proposed Change(s) and Rationale:

> **a. A description of the proposed modification(s) and rationale, including alignment with academic plans.**
>
> The proposed modification is to directly substitute the course *GS/PHIL 5340 3.00 Ethics and Societal Implications of Artificial Intelligence* with the course *SB/SUST 5100 3.00 Ethics and Technology* in the MMAI. By directly replacing PHIL 5340 with SUST 5100, this will shift the responsibility for supplying the ethics course requirement from LAPS to Schulich.
>
> SUST 5100 3.00 is a Schulich-based ethics course that was created for the new Master of Business Administration in Technology Leadership (MBAt) degree. In addition to considerable coverage of the ethics of AI, this course further examines the ethical dimensions of numerous other technologies used in business & society. Consequently, SUST 5100 better meets the comprehensive curricular requirements for graduates of both the MBAN and MMAI.
>
> MMAI students have been required to take the ethics of AI course, PHIL 5340, since the program began in 2019. This ethics of AI course was added as a requirement for MBAN students in current academic year. Given the current number of MBAN and MMAI students, LAPS encountered resource issues during the current year for offering the course to our students. This resource issue will not disappear in subsequent years, since the number of students entering the MBAN and MMAI in the coming 2023-24 academic year will exceed that of the current year. Since SUST 5100 is offered "in-house" by Schulich, its availability can be more readily controlled and scaled to

accommodate the anticipated numbers of students admitted to both programs.

b. An outline of the changes to requirements and the associated learning outcomes/objectives, including how the proposed requirements will support the achievement of program/ diploma/certificate learning objectives.

The proposed change is for a specific substitution of the AI-focused ethics course, PHIL 5340, with the more comprehensive ethics course, SUST 5100. It represents a direct replacement of one course in the programs with another. While PHIL 5340 examines only the ethics of AI, SUST 5100 analyzes the ethical dimensions of not only AI but also numerous other relevant technologies that are readily employed throughout business and society. Consequently, SUST 5100 more comprehensively achieves the desired ethical curricular requirements for graduates from both the MBAN and MMAI.

c. An overview of the consultation undertaken with relevant academic units and an assessment of the impact of the modifications on other programs/ diplomas/certificates.

Comprehensive consultations have taken place with LAPS, Lassonde, and the Sustainability Area to ensure that the proposed course transformation can occur in a fashion which is feasible and acceptable to all. The Sustainability Area, together with the specific instructor, have agreed to provide the course for the MMAI and MBAN. The respective Associate Deans for LAPS and Lassonde also support the change. Transcripts and correspondence indicating these various acceptances appear below.

d. A summary of any resource implications and how they are being addressed.

The change will not require additional material resource implications.

e. A summary of how students currently enrolled in the program/ diploma/certificate will be accommodated.

The course change will apply to the incoming cohorts of the MMAI & MBAN programs – both of which start in the summer term. Hence, it is a straightforward course switch that will have an imperceptible impact on them.

For any students from prior cohorts who might have taken a leave-of-absence and have returned to complete their programs, they would now be required to take the SUST 5100 course in place of the previous PHIL 5340 course.

4. Calendar Copy:

Existing Program/ Diploma/Certificate Information (Change From):	Proposed Program/ Diploma/Certificate Information (Change To):
<mark>**MMAI PROGRAM**</mark> **Term 1 (Summer)** MMAI 5000 3.00 Artificial Intelligence Fundamentals MMAI 5100 3.00 Database Fundamentals MBAN 6110 3.00 Data Science I MGMT 6300 3.00 Case Analysis and Presentation Skills OMIS 6750 3.00 Project Management **Term 2 (Fall)** MMAI 5040 3.00 Business Applications of Artificial Intelligence I MBAN 5110 3.00 Predictive Modelling MMAI 5400 3.00 Natural Language Processing MMAI 5500 3.00 Applications of Neural Networks and Deep Learning in Business MMAI 6050 6.00 AI Consulting Project NOTE: MMAI 6050 6.00 spans Terms 2 and 3. Students will enrol in Fall and continue the course in Term 3 (Winter). **Term 3 (Winter)** MMAI 5090 3.00 Business Applications of Artificial Intelligence II MMAI 5200 3.00 Algorithms for Business Analysis MBAN 5140 3.00 Visual Analytics and Modelling <mark>**~~GS/PHIL 5340 3.00 Ethics and Societal Implications of Artificial Intelligence~~**</mark> ===============================	<mark>**MMAI PROGRAM**</mark> **Term 1 (Summer)** MMAI 5000 3.00 Artificial Intelligence Fundamentals MMAI 5100 3.00 Database Fundamentals MBAN 6110 3.00 Data Science I MGMT 6300 3.00 Case Analysis and Presentation Skills OMIS 6750 3.00 Project Management **Term 2 (Fall)** MMAI 5040 3.00 Business Applications of Artificial Intelligence I MBAN 5110 3.00 Predictive Modelling MMAI 5400 3.00 Natural Language Processing MMAI 5500 3.00 Applications of Neural Networks and Deep Learning in Business MMAI 6050 6.00 AI Consulting Project NOTE: MMAI 6050 6.00 spans Terms 2 and 3. Students will enrol in Fall and continue the course in Term 3 (Winter). **Term 3 (Winter)** MMAI 5090 3.00 Business Applications of Artificial Intelligence II MMAI 5200 3.00 Algorithms for Business Analysis MBAN 5140 3.00 Visual Analytics and Modelling <mark>**SB/SUST 5100 3.00 Ethics and Technology**</mark> ===============================

Hello everyone,

I am now able to confirm that we are planning to bring the ethics and AI course in-house. We discussed options for possibly holding spots for Lassonde students, and that idea was not considered feasible due to the fact that our MMAI and MBAN programs have reached capacity. We cap our graduate level courses at 55 and both of those programs have an incoming class of at least that number.

So, it looks like the best option is to ask the PHIL department to staff that course again. Sorry I can't be of more help.

Thanks, Kevin

_____

Kevin Tasa, PhD
Associate Dean, Academic
Associate Professor of Organizational Behaviour
Schulich School of Business, York University

From: Lassonde Associate Dean Academic Students (ADAS) <adas@lassonde.yorku.ca>
Date: Thursday, March 16, 2023 at 8:46 AM
To: Kevin Tasa <ktasa@schulich.yorku.ca>
Cc: Associate Dean Research and Graduate Studies LA&PS <adres@yorku.ca>, Vice Dean, Lassonde School of Engineering <ad.academic@lassonde.yorku.ca>
Subject: Re: PHIL 5340 Ethics and Societal Implications of AI

Dear Kevin

Thank you for this background and the information on the new course. A course in ethics is a requirement for recognition of the Lassonde masters by the Vector Institute.

So, would it be ok for me to forward the course description to the GPD for our program?

Thanks, Richard

Richard Hornsey (he/him)
University Professor, Associate Dean Academic and Students
Lassonde School of Engineering
York University, Toronto

On Mar 15, 2023, at 4:30 PM, Kevin Tasa <ktasa@schulich.yorku.ca> wrote:

Hi everyone,

Ravi, thanks for forwarding those documents pertaining to this course. The Dean, the program director, and myself are all new to our roles and those docs helped fill in some gaps. Below is an update on things I have learned and which we can discuss next week.

I talked to current and past program directors of the Master of Management of Artificial Intelligence program to understand their views about the course. The program director pointed me to a new course that was just approved for our upcoming MBA in Technology Leadership (see attached). This course will be offered next year in the MBAt program, and the PD thinks it is superior to the current offering in the PHIL department. We are considering the option of dropping the PHIL course and adding the in-house course to the list of required courses in MMAI and MBAN programs.

Richard and Dan, I realize that if we pull back from the PHIL course it might negatively effect some of your students, especially in COSC. We are open to the idea of holding spots for your students if it is decided that the course is a reasonable substitute.

The other structural impediment to consider is that the MMAI program is no longer running from Fall to Summer. This coming summer we will begin the change to a Summer to Winter schedule, which eliminates the need for a Fall section of the PHIL course for Schulich students. If we were to continue our support of the PHIL course it would only be necessary in the Winter semester.

Happy to discuss this next week and find a solution that works.

Cheers, Kevin

Kevin Tasa, PhD
Associate Dean, Academic
Schulich School of Business, York University

From: Associate Dean Research and Graduate Studies LA&PS <adres@yorku.ca>
Date: Monday, March 13, 2023 at 2:19 PM
To: Kevin Tasa <ktasa@schulich.yorku.ca>, Lassonde Associate Dean Academic Students (ADAS) <adas@lassonde.yorku.ca>, Vice Dean, Lassonde School of Engineering <ad.academic@lassonde.yorku.ca>
Cc: Executive Administrative Assistant Dean Lassonde School of Engineering <execadmin@lassonde.yorku.ca>
Subject: Re: PHIL 5340 Ethics and Societal Implications of AI

Thanks both,

My assistant is Ives Polking: ipolking@yorku.ca

I'll look forward to speaking with you.

Best, Ravi

_____

Ravi de Costa (*he* / *him*)
Associate Dean, Research and Graduate
Faculty of Liberal Arts & Professional Studies

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S900 Ross • 4700 Keele Street
Toronto ON • Canada M3J 1P3
T 416.736.2100 x. 44569
adres@yorku.ca• www.yorku.ca

From: Lassonde Associate Dean Academic Students (ADAS) <adas@lassonde.yorku.ca>
Date: Monday, March 13, 2023 at 1:30 PM
To: Associate Dean Research and Graduate Studies LA&PS <adres@yorku.ca>, Kevin Tasa <ktasa@schulich.yorku.ca>, Vice Dean, Lassonde School of Engineering <ad.academic@lassonde.yorku.ca>
Cc: Executive Administrative Assistant Dean Lassonde School of Engineering <execadmin@lassonde.yorku.ca>
Subject: Re: PHIL 5340 Ethics and Societal Implications of AI

Hi Ravi

Apologies for not responding before your nudge. This falls across both Dan's and my portfolios as it concerns both academic programming and resourcing.

I've copied Lisa Henry in Lassonde's dean's office who can work with your assistant to set up a time to meet. In parallel, Dan and I can firm up Lassonde's position on the substance of the matter (although that may be influenced by whether this course continues to be a shared responsibility).

Best, Richard

Richard Hornsey (he/him)
University Professor, Associate Dean Academic and Students
Lassonde School of Engineering
York University, Toronto

> **From:** Associate Dean Research and Graduate Studies LA&PS <adres@yorku.ca>
> **Date:** Tuesday, March 7, 2023 at 17:58
> **To:** Kevin Tasa <ktasa@schulich.yorku.ca>, Lassonde Associate Dean Academic Students (ADAS) <adas@lassonde.yorku.ca>, Vice Dean, Lassonde School of Engineering <ad.academic@lassonde.yorku.ca>
> **Subject:** PHIL 5340 Ethics and Societal Implications of AI
>
> Hello Kevin, Richard and Dan,

I'm a bit unclear on the division of labour in your Offices, so I hope I'm addressing the right people from your respective Faculties. Please do copy in others as needed.

I'm writing about a Philosophy course we have run for about three years, which I understand is a requirement for some of your students. It originates I believe from a donation to SSB, which included funds for a post-doc, who would also teach the course. I've attached the key files I have been able to locate.

That post-doc is ending in June but the need for the course continues, and we're now at the point of mounting courses for next year. So I'm hoping we can connect fairly soon to discuss how to move forward.

I've also gathered the historical enrolment data for our consideration below.

May I ask my assistant to work with yours to find us a time for this?

Best, Ravi
——————————

Ravi de Costa (*he / him*)
Associate Dean, Research and Graduate
Faculty of Liberal Arts & Professional Studies

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W19
Fall – 30/60 (23 Schulich, 7 other programs) 5 COSC (Computer Science), 1 PHIL, 1 STS
Winter – 51/60 (46 Schulich, 5 other programs) 2 COSC, 2 PHIL, 1 VISA (Visual Arts)

FW20
Fall – 42/65 (57 Schulich, 8 other programs) 2 COSC, 1 HIST, 1 LAL (Linguistics), 4 PHIL
Winter – 43/65 (38 Schulich, 5 other programs) 1 COSC, 3 PHIL, 1 STS

FW21
Fall – 54/65 (46 Schulich, 8 other programs) 1 CIVL (Engineering), 2 COSC, 1 IST (ITEC), 4 PHIL
Winter 51/65 (46 Schulich, 5 other programs) 3 COSC, 2 PHIL

FW22
Fall – 53/65 (44 Schulich, 9 other programs) 5 COSC, 1 EECS (Electrical Engineering & Computer Science), 1 IST, 2 PHIL

Winter – 68/68 (60 Schulich, 8 other programs). 3 COSC, 1 INST (Interdisciplinary Studies), 4 PHIL

From: Geoff Kistruck <kistrugm@gmail.com>
Sent: March 24, 2023 12:36 PM
To: Kevin Tasa <ktasa@schulich.yorku.ca>
Cc: Julian Scott Yeomans <syeomans@schulich.yorku.ca>; Kathryn M. Doyle <doyleka@schulich.yorku.ca>
Subject: Re: Ethics Course

We are willing to take on the two additional sections as the instructor we secured for the MBAt section is willing to take on the additional two sections for MMAI/MBAN.

Geoff

Geoffrey M. Kistruck, PhD
RBC Professor in Social Innovation & Impact
Area Coordinator, Sustainability
Schulich School of Business, York University
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E: gkistruck@schulich.yorku.ca

SUST 5100 3.00: Ethics and Technology

Course Outline
Ethics and Technology
Fall, 2023

Time/Location: TBD

Instructor	**Assistant**
Ron Srigley, PhD	Menglin Bai
G324 McEwen Building	G324 McEwen Building
416-736-5268	416-736-5268
	mbai@schulich.yorku.ca

Brief Description

This course explores the ethical underpinning of several technological issues including Artificial Intelligence, Privacy, Machine Replacement, etc. Students will seek to understand the implications of such technological developments on society, and to manage employees and organizations in a way that balances the tension between technological advancement and human ethics.

Prerequisites/Corequisites/Course Exclusions: No prerequisites required.

Course Learning Outcomes

Can technology be ethical? Owners, advocates, and developers assert that technology is the primary engine of human betterment in the contemporary world. Critics point to its menace for capitalism, politics, society, and human flourishing. This course joins the debate. It equips students with the tools to reflect on our current situation coldly and ethically. It aims to educate them about the origins of modern technology and the challenges it poses to contemporary societies. Areas of concern include business, politics, education, and biomedical science. The course culminates in the development of rigorous ethical assessments of and remedies for real-world technological practices and applications.

By the conclusion of the course, students will have learned to:

• Explain the difference between ancient and modern technology.
• Know the scientific, economic, and ideological sources of modern technology.
• Distinguish between technology as a tool and as a world view.

• Work creatively and critically with ethical theory.
• Understand the eugenic implications of biomedical science.
• Understand the social, political, and cognitive consequences of social and digital technology.
• Explain the history and logic of surveillance capitalism.
• Understand the effects of automation and AI on labour markets
• Complete an ethical assessment of and remedy for a real-world technological application.

Course Material

There is no text or book for this course. Most of the material you need for this course will be available on our online learning platform called Canvas. Canvas contains the most up-to-date version of the readings, cases, and assigned questions for each class as current events may warrant a minor change in readings assigned from those listed on the syllabus. So please revert to Canvas (rather than the syllabus) for the most up-to-date preparation requirements.

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Student Preparation for Class and Class Participation: Expectations

We will use a variety of teaching methods to encourage intellectual understanding and a personal connection to the subject matter. Such methods include videos, group discussions, in-class exercises, presentations by guest speakers, and field interactions with social entrepreneurs.

Students are expected to read all assigned materials prior to class. Timely and comprehensive reading of the materials is not only important to ensure high quality interaction within classroom discussions/exercises, but also to ensure high quality dialogue with outside practitioners in relation to the real-world challenges they are facing. Students are also expected to be extremely courteous and highly professional in

their interactions with outside practitioners, and cognizant of their time and other constraints.

In addition to being prepared for class, it is important that students plan ahead for the successful completion of their major project. Some sub-components are not due until the latter part of the course yet require ongoing attention from the beginning of the course. It is the student's responsibility to ensure that they maintain regular progress in such endeavors.

Evaluation of Student Performance

COURSE ASSESSMENTS

1. Class participation:	20%
2. Ethical Project selection:	15%
3. Ethical Project Workshop:	25%
4. Ethical Project (written submission & presentation):	50%
	100%

DESCRIPTIONS OF COURSE ASSESSMENTS

1. *Class Participation* (20%) Student participation in class discussions, workshops, and collaborations.

2 – 4. *Ethical Project*: The major assignment for the course is a project that develops an ethical assessment of a technological application in one of the five areas examined in the course. The project is comprised of two parts. (1) An ethical assessment that engages the analysis developed in Part A of the course. (2) A remedy that addresses a real-world technological practice addressed in Part B of the course.

PHASES OF PROJECT:

2. *Selection & Justification* (15%): Students will select a particular practice/application and explain its ethical significance. (5-page report)

3. *Workshop* (25%): Students will workshop a draft of their project for comments and criticism from colleagues. Responses received will then be incorporated into final version of the project. (Power Point Presentation)

4. *Submission and Presentation* (25% & 25% =50%): Final versions of projects will be submitted and presented to the class. (15–20 pages)

All assignments are due on the date and time specified within the syllabus, and should be submitted via email to mbai@schulich.yorku.ca. A late penalty will be assigned (20%/day) for all assignments not submitted by the required date and time.

The course grading scheme for Master's level courses at Schulich uses a 9-value grade-point system. The possible course letter grades for a course (and the corresponding grade points awarded for each grade are:

A+   9 grade points
A   8
A-   7
B+   6
B   5
B-   4
C+   3
C   2
C-   1
F   0

Students are reminded that they must maintain a cumulative GPA of at least XX to remain in good standing and continue in the program, and a minimum of XX to qualify for their degree. Schulich grading guidelines mandate a section grade point average ['GPA'] of between XX and XX for core courses and a section GPA of between XX and XX for electives.

Academic Honesty

Academic honesty is fundamental to the integrity of university education and degree programs. The Schulich School will investigate and will act to enforce academic honesty policies where apparent violations occur. Students should familiarize themselves with York University's policy on academic honesty. It is printed in full in your student handbook and can also viewed on-line on the Schulich website, clicking through as indicated:

> Schulich website → 'Programs' → 'Master's Degree' → 'MBA Academic Honesty Policy'

While academic dishonesty can take many forms, there are several forms of which students should be highly aware because they are the ones that are most likely to occur in the context of a specific course.

- Plagiarism. Plagiarism is the presentation of information, ideas, or analysis generated by other people as being your own. It includes direct quotations as well as substantive paraphrases where the course of that information or idea is not clearly identified to the reader. Students should be careful to present their written work in a way that makes it completely clear in each and every case where a quotation, a paraphrase, or

an analysis is based on the work of other people. (This includes information from all sources, including websites.)

- Cheating. Cheating is an attempt to gain an unfair advantage in an evaluation. Examples of such violations include (but are not limited to) consulting prohibited materials during an examination or copying from another student.

- Failure to follow limitations on collaborative work with other students in preparing academic assignments. Each class differs in the mix of assignments and group-versus-individual preparation that is allowed. The instructor will make clear the extent of collaboration among students that is acceptable among students on various pieces of assigned work. Students should abide by those limitations and, if they are unsure about whether a certain level or form of collaboration would be acceptable, to clarify that question with the instructor in advance.

- Aiding and abetting. A student is guilty of violating academic honesty expectations if he/she acts in a way that enables another student to engage in academic dishonesty. If a student knows (or should reasonably expect) that an action would enable another student to cheat or plagiarize, that student's action constitutes an academic honesty violation. Illustrative examples include making your exam paper easily visible to others in the same exam or providing your own working or finished documents for an 'individual assignment' to another student (even if that other student said that he/she just wanted to 'get an idea of how to approach the assignment' or 'to check whether they had done theirs correctly').

- Use of academic work in more than one course. Generally, academic work done for every course is 'new' work, done for that course only. If a student wishes to use some or all of the academic work done for an assigned task in one course in another course, the student must get explicit, prior permission from both instructors so that they agree that the scope and nature of the overlapping use of that work is such that it can fairly be counted toward both courses.

Class-by-Class Syllabus

PART A: THE MAKING OF TECHOLOGICAL SOCIETY AND WHY IT MATTERS

Week	Subject	Readings
Week 1	*Origins of Technological Society*	Plato. *Republic* Appian, *The Third Punic War* Bacon, Francis. *The New Organon*

Week	Subject	Readings
		Machiavelli, Niccolò. *The Prince* Von Neumann, "Can we Survive Technology?"
Week 2	*Classical ethical theory and its limitations*	Immanuel Kant, *On the Metaphysics of Morals* J.S. Mill, *Utilitarianism* Aristotle, *The Nicomachean Ethics* Aquinas, *Commentary of Aristotle's Nicomachean Ethics* Carol Gilligan, *In a Different Voice*
Week 3	*A New Framing the Ethical Problem Posed by Technological Society*	

PART B: THE ETHICAL CHALLENGES OF TECHNOLOGICAL SOCIETY

Week	Subject	Readings
Week 4	*AI, Automation, and Labour*	Pascale, Frank. "Secret Algorithms Threaten the Rule of Law" Penrose, Roger. *Shadows of the Mind* Zittrain, Jonathan. "The Hidden Costs of Automated Thinking"
Week 5	*Political and Social Integration & Fragmentation*	Lanchester, John. "You Are the Product: It Zucks!" Lanier, Jaron. *Ten Arguments for Deleting Your Social Media Accounts Right Now*

		Harari, Yuval Noah. "Why Technology Favors Tyranny"
Week 6	*Biology & Eugenics*	Kurzgesagt. "Genetic Engineering Will Change Everything Forever – CRISPR" Regalado, Antonio. "DNA tests for IQ are coming, but it might not be smart to take one"
Week 7	*Education and Stupidification*	Collini, Stephan. *What Are Universities For?* Smith, Justin. *The Internet Is Not What You Think It Is* Davies, William. "How many words does it take to make a mistake?"
Week 8	*The Ascendancy of Surveillance Capital*	Lewis, Michael. *Flash Boys* Zuboff, Shoshana. *The Age of Surveillance Capitalism*

C. CAN TECHNOLOGY BE ETHICAL? CASE STUDIES AND SOLUTIONS

Week	Subject	Reading
Week 9	*Workshopping draft proposals*	N/A
Week 10	*Legal Matters: Regulating Tech* Guest Speaker	TBD
Week 11	*Political Matters: The Case Sidewalk Labs Toronto*	TBD

	Guest Speaker	
Week 12	*Personal Matters: The Ascent of Transhumanism* Guest Speaker	TBD
Week 13	*Proposal Presentations*	N/A

REQUIRED READINGS

Appian, *The Third Punic War,* https://www.livius.org/sources/content/appian/appian-the-punic-wars/appian-the-punic-wars-27/#132

Aquinas. *Commentary of Aristotle's Nicomachean Ethics.* Trans. C. I. Litzinger. Chicago: Henry Regnery Co. 1964. https://isidore.co/aquinas/english/Ethics.htm (Selections)

Aristotle. *Nicomachean Ethics.* Trans. W.D. Ross. Kitchener: Batoche Books Ltd., 1999. https://socialsciences.mcmaster.ca/econ/ugcm/3ll3/aristotle/Ethics.pdf (Selections)

Bacon, Francis. *The New Organon*. Ed. Fulton Anderson. New York: Macmillan Publishing Company, 1960. (Selections)

Collini, Stephan. *What Are Universities For*? London: Penguin Books, 2012. (Selections)

Davies, William. "How many words does it take to make a mistake?" *London Review of Books*, Vol. 44 No. 4 · 24 February 2022.

Feyerabend, Paul. *The Conquest of Abundance: A Tale of Abstraction Versus the Richness of Being*. Ed. Bert Terpstra. The University of Chicago Press, 1999. (Introduction)

Gilligan, Carol. *In a Different Voice*: *Psychological Theory and Women's Development.* Harvard University Press, 1982. (Selections)

Harari, Yuval Noah. "Why Technology Favors Tyranny." *The Atlantic*, October 2018.

Kant, Immanuel. *On the Metaphysics of Morals.* Trans. Mary Gregor. Cambridge: Cambridge University Press, 1997. https://cpb-us-w2.wpmucdn.com/blog.nus.edu.sg/dist/c/1868/files/2012/12/Kant-Groundwork-ng0pby.pdf (Selections)

Kurzgesagt. "Genetic Engineering Will Change Everything Forever – CRISPR." https://www.youtube.com/watch?v=jAhjPd4uNFY

Lanchester, John. "You Are the Product: It Zucks!" *London Review of Books*, 17 August 2017.

Lanier, Jaron. *Ten Arguments for Deleting Your Social Media Accounts Right Now*. New York: Henry Holt & Company, 2018. (Argument One)

Lewis, Michael. *Flash Boys*. New York: W.W. Norton Publishing Company, 2014. (Selections)

Machiavelli, Niccolò. *The Prince*. 2nd Edition. Trans. Harvey Mansfield. University of Chicago Press, 1998. (Selections)

Mill, J.S. *Utilitarianism.* Kitchener: Batoche Books Ltd., 2001. https://socialsciences.mcmaster.ca/econ/ugcm/3ll3/mill/utilitarianism.pdf (Selections)

Pascale, Frank. "Secret Algorithms Threaten the Rule of Law." MIT Technology Review. June 2017. https://perma.cc/2PGQ-U8LV

Penrose, Roger. *Shadows of the Mind*. Oxford: Oxford University Press, 1994. (Selections)

Plato. *Republic*. Trans. Allan Bloom. New York: Basic Books, 1968. (Selections)

Regalado, Antonio. "DNA tests for IQ are coming, but it might not be smart to take one." MIT Technology Review, April 2, 2018. https://www.technologyreview.com/2018/04/02/144169/dna-tests-for-iq-are-coming-but-it-might-not-be-smart-to-take-one/

Smith, Justin. *The Internet Is Not What You Think It Is*. Princeton: Princeton University Press, 2022. (Selections)

Zittrain, Jonathan. "The Hidden Costs of Automated Thinking." *The New Yorker*, July 23, 2019. https://perma.cc/5MZD-BWEA

Zuboff, Shoshana. *The Age of Surveillance Capitalism: The Fight for a Human Future at the New Frontier of Power*. New York: Public Affairs, 2019. (Selections)

SUPPLEMENTARY READINGS

Baudrillard, Jean. *The Transparency of Evil*. London: Verso Press, 1993.
Carr, Nicholas. The Shallows. New York: W. W. Norton & Co., 2010.

Grant, George. *Technology and Justice*. House of Anansi Press, 1986.

Hanlon, Michael. "The Golden Quarter." *Aeon*, 2014. https://aeon.co/essays/has-progress-in-science-and-technology-come-to-a-halt

Tourigny, Pierre. "Can Wearables Help You Reach Immortality?" *Wired*, February 2015. https://www.wired.com/insights/2015/02/can-wearables-help-you-reach-immortality/

Turkle, Sherry. *Simulation and It's Discontents*. The MIT Press, 2009. (Selections)

MMAI 2023-24 Program Level Learning Outcomes	OMIS 6750 Project Management	MBAN 6110 Data Science 1	MGMT 6300 Case Analysis & Presentation Skills	MMAI 5000 AI Fundamentals	MMAI 5100 Database Fundamentals	MBAN 5110 Predictive Modelling	MMAI 5040 Business Applications of AI 1	MMAI 5400 Natural Language Processing	MMAI 5500 Applications of Neural Networks & Deep Learning in Business	MMAI 6050 AI Consulting Project	SUST 5100 Ethics and Technology	MBAN 5140 Visual Analytics & Modelling	MMAI 5090 Business Applications of AI 2	MMAI 5200 Algorithms for Business Analysis	MMAI 6050 AI Consulting Project
			Term 1					Term 2					Term 3		
1. Analytical Skills and Enhanced Decision-Making															
1.1. Apply big data analysis tools and techniques to enhance business decision making.	I	I		I	I	I	I	D	D	R			D	D	A
1.2. Design data-science solutions for problems commonly found in business.		I	I	I	I	I	D	D	D	A			R	D	A
1.3. Manage a business analytics project through all phases of the data science lifecycle.	I	I		I	I	R	D	R	R	R				R	A
1.4. Apply mathematical, statistical, and machine learning foundations of AI in the context of an evidence-based business decision support process.		I					R	D	D				R	D	
1.5. Apply strategic thinking skills to managerial decision making.	R						R			A	R	R	R	R	A
1.6. Recognize the limitations of theoretical models, techniques, and empirical findings.		I	I	I		R	I	D	D				R	R	
2. Professional Communication															
2.1. Prepare and deliver an effective and engaging oral presentation for both technical and non-technical audiences.	D		D				D			R		I	R		R
2.2. Prepare an effective and engaging written report for both technical and non-technical audiences.	D		D				D	R	R	R		I	R		R
2.3. Apply strategies to work effectively in interdisciplinary teams.	R		A				I				R		R		
3. Ethics & Social Responsibility															
3.1. Identify the ethical and social responsibilities related to the collection, analysis and reporting of the data.	I		I							R	A				R
3.2. Describe, analyze, and devise solutions for ethical and social issues that arise in business analytics.	I		I							R	A				R

I= Introduced, D= Developed, R= Reinforced, A= Assessed individually for Achievement

To: Faculty Council, Schulich School of Business
From: Geoffrey Kistruck, Area Coordinator, Sustainability
         Luke Zhu, Program Director, Master of Management Program
Date: April 23, 2023
Re: Course rubric and title change for MSTM 5050

Motion: That Faculty Council approve the change in rubric and name of MSTM 5050 Business and Sustainability – to SUST 5050 – Management and Sustainability

Rationale: With the creation of the Sustainability Area, the rubric (SUST) is being given to courses administered by the Sustainability area, making this consistent in all teaching programs and making it clear where to follow up for additional information. To avoid confusion between the core Sustainability course being offered in the MBA program and the Master of Management Program the course title has been changed so that they have distinctive names.

Course Change Proposal Form
Schulich School of Business

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

1. **Responsible Program:**
   Schulich Master of Management Program

2. **Responsible Unit:**
   Sustainability Area

3. **Subject Code (Rubric) and Course Number:**
   MSTM 5050

4. **Credit Value:**
   3.0 credit course

5. **Long Course Title:**
   Business and Sustainability

6. **Short Course Title:**
   Business and Sustainability

7. **Type of Course Change(s) (indicate all that apply):**

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

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

9. **Rationale:**

With the creation of the Sustainability Area, the rubric (SUST) is being given to courses administered by the Sustainability area, making this consistent in all teaching programs and making it clear where to follow up for additional information. To avoid confusion between the core Sustainability course being offered in the MBA program and the Master of Management Program the course title has been changed so that they have distinctive names.

Existing Course Information (Change From):	**Proposed Course Information (Change To):**
Title	**Title**
Current: ~~Current Course Rubric/Number: MSTM 5050 3.0~~ Title: Calendar Description: ~~Business~~ and Sustainability Explores how organizations respond to increasing expectations to deliver sustainable performance at the economic, social and environmental level. Students grasp different ways in which companies can respond to growing pressures to adopt sustainability and study strategies of how companies can lead the way forward by developing practical solutions to some of society's most challenging problems.	**Proposed:** New Course Rubric/Number: **SUST** 5050 3.0 Title: **Management and Sustainability** Calendar Description: no change

10. Proposed Course Information:

11. Enrolment Notes:
No changes to enrolment from existing requirements

12. Consultation:

V. July 2021

Originator:

Geoffrey Kistruck	April 23, 2023
Signature	Date

Geoffrey Kistruck	Sustainability
Name	Area or Specialization

Approvals:

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

Geoffrey Kistruck	April 23, 2023
Signature	Date

Geoffrey Kistruck	Sustainability
Name	Area or Specialization

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

Luke Zhu	April 23, 2023
Signature	Date

Luke Zhu	Master of Management
Name of Program Director	Program

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

Kevin Tasa	May 4, 2023
Signature	Date

Kevin Tasa	Master Program Committee Chair
Name of Committee Chair	Committee

Schulich
School of Business

INSTRUCTOR
TBA

✉

ⓘ 416.736.2100 Ext
🏠 SSB
🏠

ADMIN
Menglin Mary Bai

mbai@schulich.yorku.ca

416.736.2100 Ext. 55268

G324 MB

MSTM5050   F2022   **CREDITS: 3.00**

SUST 5050 A - MANAGEMENT AND SUSTAINABILITY

🕐 FRI 08:30-11:30   🏠 MB G105

OPEN TO MASTER OF MANAGEMENT (MMgt) STUDENTS ONLY

BRIEF DESCRIPTION

Explores how organizations respond to increasing expectations to deliver sustainable performance at the economic, social and environmental level. Students grasp different ways in which companies can respond to growing pressures to adopt sustainability and study strategies of how companies can lead the way forward by developing practical solutions to some of society's most challenging problems.

COURSE LEARNING OUTCOMES

Business is the modern engine of economic growth providing immense benefits for society including innovation, income for individuals, essential goods and services for consumers, taxation revenue, and higher standards of living across the globe. Yet business has recently been put under the microscope in the backdrop of a wide range of social, ecological, and economic scandals that have rocked society's faith in the once highly reputable business institution. Unethical sales tactics of Canadian financial institutions on unsuspecting consumers, the use of a highly invasive tracking app by Tim Horton's, deliberate efforts by grocery retailers and food manufacturers to fix prices of commodity goods, corporate profiteering that contributes to inflation, the role of investment banks in the 2008 financial crisis, and Volkswagen's deliberate efforts to hide illegal pollution levels of their vehicles have all led to growing debate about business' role in society.

Society's expectations of business graduates are therefore evolving as the business leader of the future is expected to possess the skills necessary to excel in an environment that demands accountability along non-financial dimensions (e.g. ecological, social and governace). As a result, understanding the relationship between business and society has become a strategic issue for business in all sectors, whether the goal is to stay the course and to mitigate risk that might come with increased regulation or unprecedented stakeholder pressure or to more proactively play a leadership role in challenging the many industry practices that are responsible for society's most challenging problems.

This course introduces students to five fundamental strategies companies use to respond to growing pressures to adopt more responsible or sustainable business practices. Through these strategies, students will develop an understanding of the major causes that leave companies at odds with society and how responsible business leadership requires students to challenge the fundamental institutions that guide present-day industrial activity.

By the conclusion of this course, students would have:

1. Gained a broad understanding of the sources of tension between traditional business approaches and society and the challenges managers and leaders face as a result.
2. Developed knowledge of different strategic approaches businesses adopt in response to societal needs across a range of industries.
3. Learned how to critically assess a business' performance along non-financial dimensions.
4. Identified, understood and applied the fundamental challenges that inhibit businesses from pursuing progressive responsible business strategies.
5. Gained a broad understanding of the opportunities for alignment between business interests and those of society and the tools required to achieve this alignment.

COURSE MATERIAL

There is no text or book for this course. Most of the material you need for this course will be available on our online learning platform called Canvas. Canvas contains the most up-to-date version of the readings, cases, and assigned questions for each class as current events may warrant a minor change in readings assigned from those listed on the syllabus. So please revert to Canvas for the most up-to-date preparation requirements.

For those materials that cannot be accessed via Canvas due to copyright laws, students are required to purchase a coursekit online. To make this purchase, students must do the following.

Student Instructions to purchase coursepack:

1. Go to the Ivey Publishing website
2. Login to your existing account or Register for a student account.
3. Click on this link or copy into your browser: **https://hbsp.harvard.edu/import/961295 (https://hbsp.harvard.edu/import/961295)**
4. Click Add All to Cart.
5. Go to your Shopping Cart and proceed through the Checkout.
6. When payment has been processed, an Order Confirmation will be emailed to you.
7. To download your digital copies, click on your name on the top right corner, click on View My Order → Downloads.
8. Downloads can also be accessed by clicking on your username → Orders → Downloads

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ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Course Participation 10%			
Course Participation (1st Half of Term)	👤	5%	
Course Participation (2nd Half of Term)	👤	5%	
Assignment #1: Company Sustainability Assessment 35%			
Assignment #1: Company Sustainability Assessment	👤	35%	TBD at 12:00pm EDT
Assignment #2: Business Leadership in Sustainability 35%			
Assignment #2: Business Leadership in Sustainability	👥	35%	TBD at 08:30am EST
Canvas Exercises 20%			
Exercise Due: Peer Evaluation	👤	0.47%	TBD at 08:30am EST
Exercise Due: Profit and the Public Good	👤	0.47%	TBD at 08:30am EDT
Exercise Due: Your Covid-19 Response Type	👤	0.16%	TBD at 08:30am EDT
Exercise Due: Veta la Palma and Complexity Theory	👤	0.47%	TBD at 08:30am EST
Exercise Due: Patagonia Case Analysis	👤	0.93%	TBD at 08:30am EST
Exercise Due: What is Your Sustainability Passion?	👤	0.16%	TBD at 08:30am EST
Exercise Due: Negative Externalities	👤	0.78%	TBD at 08:30am EDT
Exercise Due: YU Ranch Case Analysis	👤	0.78%	TBD at 08:30am EST
Exercise Due: McDonald's and Poverty	👤	0.62%	TBD at 08:30am EST
Exercise Due: Social Movements and Market Rebels	👤	0.78%	TBD at 08:30am EST
Exercise Due: TerraCycle Case Analysis	👤	0.62%	TBD at 08:30am EDT

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Exercise Due: Honey Care and Institutional Entrepreneurship	👤	0.78%	TBD at 08:30am EDT
Exercise Due: Creating Shared Value	👤	0.16%	TBD at 08:30am EDT
Exercise Due: Honey Care Case Analysis	👤	1.09%	TBD at 08:30am EDT
Exercise Due: Southside Restaurant Wine Bottle Assessment	👤	0.78%	TBD at 08:30am EDT
Exercise Due: Assessing Sustainability of a Company	👤	0.78%	TBD at 08:30am EDT
Exercise Due: Financial Literacy Quiz	👤	0.31%	TBD at 08:30am EDT
Exercise Due: Analysis of Meridian Credit Union	👤	0.78%	TBDat 08:30am EDT
Exercise Due: Who is to Blame for the Obesity Epidemic?	👤	0.16%	TBD at 08:30am EDT
Exercise Due: PepsiCo and Obesity	👤	0.62%	TBD at 08:30am EDT
Exercise Due: Nike Case Analysis	👤	0.31%	TBD at 08:30am EDT
Exercise Due: Facebook Case Analysis	👤	0.47%	TBD at 08:30am EDT
Exercise Due: Calculate and Submit Your Ecological Footprint	👤	0.31%	TBD at 08:30am EDT
Exercise Due: Business and Sustainability Course Student Survey	👤	0.31%	TBD at 08:30am EDT
Exercise Due: Tata Chemicals Case Analysis	👤	0.93%	TBD at 08:30am EST
Exercise Due: Fast Fashion and Paradox	👤	0.62%	TBD at 08:30am EST

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Course Participation (1st Half of Term).

Your total course participation grade is worth 10% of your final grade. This 5% component is based on your participation in the first 6 weeks of the course.

Students are expected to participate by engaging in class discussion and participating in live exercises, course discussion board, and small group discussions. I score your level of engagement by reflecting on your comments made

in class, reading the discussion board and chat logs (for zoom classes if applicable) and assessing your level of participation in small group settings. For any zoom classes, students are not required but encouraged to have their cameras on. Students are also invited to start and participate in canvas discussion boards on topics related to the course. Students receive a score out of 4 for each class. Totaling your score, I calculate your grade for the first half of the course out of 5.

Generally, course participation is graded as follows:

Grade	Participation
4 A/A+	Strong participation in classes through active and strong contribution to the discussion, the online chat log (if applicable) and Canvas discussion board, consistent participation in polls and other live exercises, and a strong contributor in small group discussions. Contributes by analyzing/applying course material within a class and by applying relevant concepts from previous classes and is willing to take risks in attempting to answer difficult questions. Overall, the student's participation significantly improves the learning of their peers.
3 B+/A-	Good participation in classes through moderate and good contribution to the discussion and/or the online chat log (where applicable) and/or Canvas discussion board, consistent participation in polls and other live exercises, and a good contributor to small group discussions. Contributes with answers to the questions posed in class and/or builds on or challenges comments made in class, discussion board, chat log and in small groups in ways that elicit student learning. Overall, the student's participation is important in helping move the discussion along.
2 B-/B	Minimal participation in classes with some contribution to the discussion, minimal activity on the online chat log (where applicable) and Canvas discussion board, good participation in polls and other live exercises, and basic contribution to small group discussions. Contributes to discussion, but at a basic level – e.g. provides topical information, factual information from the reading/case, summarizes facts and asks basic questions for clarification.
1 C/C+	Attends classes but generally does not participate in the discussion with low activity on the online chat log (where applicable) and Canvas discussion board, partial participation in polls and other live exercises, and little contribution in breakout groups.
0 F	Does not attend classes with no contribution on the Canvas discussion board.

Course Participation (2nd Half of Term).

Your total course participation grade is worth 10% of your final grade. This 5% component is based on your participation in the last 6 weeks of the course.

Students are expected to participate by engaging in class discussion and participating in live exercises, course discussion board, and small group discussions. I score your level of engagement by reflecting on your comments made in class, reading the discussion board and chat logs (for zoom classes if applicable) and assessing your level of participation in small group settings. For any zoom classes, students are not required but encouraged to have their cameras on. Students are also invited to start and participate in canvas discussion boards on topics related to the course. Students receive a score out of 4 for each class. Totaling your score, I calculate your grade for the first half of the course out of 5.

Generally, course participation is graded as follows:

Grade	Participation
4 A/A+	Strong participation in classes through active and strong contribution to the discussion, the online chat log (if applicable) and Canvas discussion board, consistent participation in polls and other live exercises, and a strong contributor in small group discussions. Contributes by analyzing/applying course material within a class and by applying relevant concepts from previous classes and is willing to take risks in attempting to answer difficult questions. Overall, the student's participation significantly improves the learning of their peers.
3 B+/A-	Good participation in classes through moderate and good contribution to the discussion and/or the online chat log (where applicable) and/or Canvas discussion board, consistent participation in polls and other live exercises, and a good contributor to small group discussions. Contributes with answers to the questions posed in class and/or builds on or challenges comments made in class, discussion board, chat log and in small groups in ways that elicit student learning. Overall, the student's participation is important in helping move the discussion along.
2 B-/B	Minimal participation in classes with some contribution to the discussion, minimal activity on the online chat log (where applicable) and Canvas discussion board, good participation in polls and other live exercises, and basic contribution to small group discussions. Contributes to discussion, but at a basic level – e.g. provides topical information, factual information from the reading/case, summarizes facts and asks basic questions for clarification.
1 C/C+	Attends classes but generally does not participate in the discussion with low activity on the online chat log (where applicable) and Canvas discussion board, partial participation in polls and other live exercises, and little contribution in breakout groups.
0 F	Does not attend classes with no contribution on the Canvas discussion board.

Assignment #1: Company Sustainability Assessment.

⏳ **Due Date:** **TBD** at 12:00pm EDT

Company Sustainability Assessment (35%)

For this assignment, students are expected to evaluate a company's sustainability performance. This assignment, done by all students individually, is a prelude to the final group project where students will provide consultant advice on how a small company (in the same industry as the company they are examining in this assignment) can succeed using an embedded and transformational strategy. With this goal in mind, this first assignment is meant to ensure that students are aware of the social, ecological, and economic issues relevant to an industry, the existing sustainability performance of a company in the industry and those forces that make sustainability very difficult to adopt. Students will have the opportunity to sign up for a company from the list below in Table 1 early in the semester. The breakdown of the assignment is as follows:

1. Social/environmental Issues (20%): Students must identify three highly relevant sustainability issues associated with the industry their chosen firm is in. They must explain why these issues pit the interests of businesses operating in this industry against the interests of society. This will require some reflection. Taking a look at the company's website, company CSR/sustainability reports (if available) and other publicly available information will be important in identifying these issues. Ultimately, you want to ask: "what are the top negative externalities that this industry is known to create"? Are they all ecological? Are they a mix of social and ecological? Economic? Whatever you

choose, students should provide a justification for why these are particularly relevant and important because of the tension between societal and business interests. At 20% of the assignment grade, you should be relatively brief here. Identify the three and explain why they are relevant.

2. Performance (40%): Students must then assess the performance of their chosen company using the four criteria in Module 5 (purpose, metrics, targets, and legitimacy). Specifically, they must assess the company's response to the three issues identified in part 1. A key resource for you will be the company's website (some companies will have a CSR or Sustainability report). From this analysis, students are expected to identify the company's sustainability strategy discussed in Module 3.

3. Institutional Forces (30%): Drawing on Module 4, students must then identify the institutional forces that make it difficult for companies in the industry to adopt more progressive sustainability strategies. Specifically,

    I. Students must identify any cognitive, normative, and regulatory forces that explain why companies in the industry resort to a denial, defense or, at best, an isolated strategy.

    II. To a lesser degree, students must also identify how their chosen company contributes to these forces (e.g. through the influence on government, marketing, setting industry standards, etc.).

4. Report presentation (10%): This includes quality of writing (e.g. grammar, sentence structure) and proper use of citations (note that I'm indifferent on the citation format - APA, Chicago, etc.). Reports should be presented in single spaced. When designing your report, take the role of an analyst tasked with conducting an assessment of the company's sustainability performance. The audience reading the report would include consumers, shareholders, and other stakeholders.

The Bronfman library has put together a video to assist in your research for this assignment. The video can be found **here** (https://www.youtube.com/watch?v=tmA4nTZIu6s). The first assignment is due by **12pm on Sunday, October 23rd** must be submitted via Canvas. Students will be penalized one grade point for each three-day period that the assignment is late. The assignment should be no longer than 2000 words (not including references). Students are encouraged to use tables to summarize their analysis (e.g. summarize 3 institutional forces in a table) and use the text to highlight key points or takeaways in the tables. The grading rubric for this assignment can be found further below.

	Industry	Individual Assignment #1 Companies
1	Automotive	Hyundai, Kia, Honda, Ford, Chrysler, Volvo
2	Meat Production	Tyson Foods, Cargill, Smithfield Foods, Maple Leaf Foods, Perdue Farms
3	Fashion/Apparel	H&M, Inditex, Lululemon, Canada Goose, Prada
4	Home Building Retail	Canadian Tire, Home Depot, Home Hardware, RONA, Lowe's
5	Grocery Retailers	Loblaw, Metro, Sobey's, Safeway, Tesco, Costco, Wal-Mart
6	Toy Manufacturers	Lego, Mattel, Hasbro, Melissa and Doug, Hape
7	Hospitality	Marriot International, Hilton Hotels, Intercontinental Hotel Group, Wyndham Hotel Group, Carnival Corporation, Royal Caribbean Group
8	Fast Food	McDonald's, Burger King (BMI), Wendy's, Subway, Pizza Pizza, YUM!

Assignment #1 Grading Rubric

C to B Grade	B+ to A+ Grade
Issues identified did not seem relevant to industry and/or they missed the key negative externality of the industry and there was poor or no explanation of the tension between business and society. Issues tend to be too broad and the student is trying to cover too much (e.g. environmental impact).	Excellent justifica business and soc
Regarding the assessment of company performance: Student tends to be more of an advoctate/cheerleader of company activities. Student describes what they are doing and tends to list random initiatives. Student presents the raw data but with little analysis of said data. Students relied only on what was reported. In the absence of reported information by the company, the student fails to disclose what they were expecting to see reported.	Regarding the as and critical think focused. Studen effectively descri strategy.
Claims made on company performance in sustainability and the company's sustainability strategy were unconvincing to the reader.	Claims made on consistent with t
Weak application of institutional forces (e.g. stuck at the firm/industry level only). Little or no reflection and discussion on how company influences institutional forces.	Strong applicatic explanation of h
Very poor application of course concepts where students did not apply the correct concepts or applied them poorly with little demonstration of understanding how this assignment relates to the first 6 modules	Overall, there wa analysis with the conclusions.
In terms of presentation, relatively poor grammar and sentence structure, formatting unprofessional and no use of tables when there were clear opportunities to benefit from said tables. Improper citations or lack thereof.	In terms of prese formatting and e

Assignment #2: Business Leadership in Sustainability.

⧗ **Due Date:** TBD at 08:30am EST

For the final project, you will be working as a group. Students who chose companies of the same industry for the first assignment are put together in groups for the final project. Each group focuses on a small company from the table below chosen specifically because they exemplify a strong commitment to society (e.g. embedded strategy). Your task is to draw on and apply material from the course to explain their success thus far and to provide the company with advice

on how to succeed with an embedded strategy and, more importantly, how to take on a transformational strategy in the future.

The later modules of this course will expose you to tools that have allowed businesses to "push the envelope" on what is possible when the objective is to minimize, if not eliminate, social, economic, and ecological issues while remaining profitable. As a group, you are expected to identify which of these tactics and approaches are needed to ensure that your assigned company not only achieves this end but also demonstrates feasibility and thus profitability. You are playing the role of consultants in that you are providing advice on how an already committed company to sustainability can improve their performance in this area and compete against some of the mainstream players in their industry. Given that, as a group, you have examined several of the mainstream players that this company competes with (i.e. from the individual assignment), you are well positioned to not only make sure that this company effectively embeds sustainability in a way that is differentiated but also to make sure that they can help to transform the many unsustainable practices of the industry in the future. The breakdown of the assignment is as follows:

1. Overview of the Business (5%)
    I. Basics: What is the organization's purpose/vision? What does the organization do? What product/service does it provide to the market? Who are its competitors? Who are its suppliers? Who are its consumers? Please add any other relevant introductory information.
2. Summary of Context (15%)

    I. Competitive Forces: As you know, each group member has examined one mainstream company in the industry. The group is expected to summarize what these companies are doing to respond to the issues identified in Assignment #1. The goal here is to ascertain how the existing competitive context is positioned in the domain of sustainability. Specifically, what sustainability strategy are they using. What are the main themes across their responses? This is important because you want to make sure that your allocated business is differentiated from competitors in terms of their approach to sustainability.
    II. Institutional Forces: Summarize the critical institutional forces that each group member identified in the previous assignment that make it difficult for this company to succeed not only in embedding sustainability but in adopting a transformational strategy.

    Important note: You must demonstrate an ability to synthesize the information you gathered independently in Assignment #1 by identifying key themes that provide confidence of what is happening at the industry level.

3. Embedding Sustainability through the Business Case (30%). You may find that your company embeds sustainability by targeting a niche segment of the market (e.g. Honey Care targets mid-high income earners, Patagonia targets high income adventurists). Before moving to a transformational strategy, it is critical that you understand how this company establishes strategic differentiation in a small segment of the market and/or how you advise that they more successfully achieve this end. Put another way, I want you to apply course concepts to describe what the company is doing so far but at the same time use these concepts to identify what might be missing or what the company might improve upon.

    I. Value Creation: Drawing on the Porter and Kramer framework, describe how the company expands the value pool and how it can further expand the value pool? For whom is it creating value (be specific)? What types of consumers are willing to pay for what the value the company is providing?
    II. Value Capture: What is (or should be) sources of competitive advantage for the company? Provide a rare/difficult to imitate diagram. Assess the sources of competitive advantage using the three criteria that allow competitive advantage to be sustained over time (causal ambiguity, social complexity, and path dependence).

4. Transforming for Sustainability (30%). As discussed in our final strategy, business and sustainability is not only about satisfying a niche market, it is about actively seeking to challenge industry or even societal behavior by targeting the mainstream market. TerraCycle's efforts to shift society from a linear to a circular consumption pattern and Patagonia's efforts to redefine the consumer relationship with clothing are examples here.

    I. Devise a consumer distribution diagram (e.g. Patagonia's market segment distribution) and identify what types of consumers the company should pursue in its efforts to target the mainstream? To make this happen, what needs to be transformed (think of what Patagonia was trying to transform)? Be clear here.
    II. Which of the 5 tools for a transformational strategy (meta-organizations, paradox, institutional entrepreneurship, social movements and systems thinking) are best to achieve this end? How do you advise your company use

them?

III. How should the company's core competencies (or sources of competitive advantage) evolve from the embedded strategy to the transformational strategy (i.e. the YU Ranch case).

IV. Finally, how will the above overcome the institutional forces summarized in Part 1 of this project that make it difficult to attract this segment of the market? All of the above ideas are only effective if they overcome these institutional forces. Explain how this will happen.

5. Presentation (20%): This project must be submitted in the form of a slidedeck (maximum 35 slides). Students are encouraged to use the notes section of the slides to add additional detail to the main text on the slides if they feel it is necessary. All groups are required to conduct an oral presentation of their slidedeck. A select number of groups will present their report live in our final synchronous class while the remaining will pre-record their oral presentation and submit them by the start of our last class. Pre-recorded presentations do not require any special editorial enhancements. Those not presenting live will be required to assist in grading those who do present live. All oral presentations (live or pre-recorded) must be completed within a 20 minute time frame. With this in mind, groups should remain selective on what parts of their slidedeck (and of each slide) to present and should highlight what sections of busy decks the audience should focus their attention on. Put another way, please refrain from presenting all material in the slidedeck and from submitting two separate slide decks (one for submission and one for the presentation). Be selective and pick those elements that contribute to a high-quality presentation. 20% of your grade for this project is therefore based on the quality and sequence of the slide deck along with the effective and professional means by which they were presented. Not all group members are required to present in the oral presentation.

The slidedeck and oral presentation (for those groups not chosen to present live) for Assignment 2 are due by the start of our last class. Only one group member needs to submit the slides. Groups will be penalized one grade point for each three-day period that the project is late. The slidedeck must be submitted on Canvas. The grading rubric for Assignment #2 can be found further below.

Peer Evaluation

The best time to deal with issues within a group is when it appears, rather than when the final project is due. If team members experience disagreement that they cannot resolve themselves, they should speak with the instructor. To ensure that the team members each deliver on their commitments to the project, a formal peer evaluation process will be used. Criteria for the peer evaluation include:

- Attendance and participation at team meetings
- Preparation for meetings
- Cooperativeness in getting work done
- Time and effort put into the project
- Timeliness and quality of the work
- Use of interpersonal and group dynamic skills
- Any other elements of teamwork.

Each member of the group will evaluate their respective group members (including themselves) on a scale of 1 to 5 based on the criteria above. Take this very seriously, because I do. I will consider this input in assigning the final grade of the student whereby an adjustment to an individual student's assignment grade could be as much as 2 grade points (e.g. A turns into a B+). The peer evaluation form can be found under Module 12. This evaluation is due by 5pm one day after the due date of the group project.

	Industry	Individual Assignment #1 Companies	Group Assignment #2 Company
1	Automotive	Hyundai, Kia, Honda, Ford, Chrysler, Volvo	Tesla
2	Meat Production	Tyson Foods, Cargill, Smithfield Foods, Maple Leaf Foods, Perdue Farms	Polyface Farm

3	Fashion/Apparel	H&M, Inditex, Lululemon, Canada Goose, Prada	PrAna
4	Home Building Retail	Canadian Tire, Home Depot, Home Hardware, RONA, Lowe's	Green Building Supply
5	Grocery Retailers	Loblaw, Metro, Sobey's, Safeway, Tesco, Costco, Wal-Mart	Goodness Me!
6	Toy Manufacturers	Lego, Mattel, Hasbro, Melissa and Doug, Hape	Tender Leaf
7	Hospitality	Marriot International, Hilton Hotels, Intercontinental Hotel Group, Wyndham Hotel Group, Carnival Corporation, Royal Caribbean Group	Gap Adventures
8	Fast Food	McDonald's, Burger King (BMI), Wendy's, Subway, Pizza Pizza, YUM!	Chipotle

Assignment #2

Grading Rubric

A/A+: Group provides key very useful and comprehensive information about the company. The group identifies key themes associated with the competitor and institutional analyses from assignment #1. That is, they nicely capture the key tactics used by the large competitors in response to sustainability as a key consideration for how their assigned company can be differentiated. They also prepare the reader/audience for the key institutional forces in the industry that the company must overcome to succeed with a transformational strategy. The group very effectively demonstrates an understanding of how their company can (or has been) embedding sustainability by demonstrating how they go about expanding the value pool. They also explicitly discuss what is (or should be) their competitive advantage for the purpose of capturing value. Ultimately, the group provides a comprehensive overview of how the company can be or is profitable with an embedded strategy. For the transformational strategy section, the group clearly identifies what is being transformed and provides a solid understanding of what it means to expand market share using the consumer distribution diagram. They chose the best frameworks for their slidedeck and applied the frameworks to explain how their assigned company could overcome institutional forces. The group showed a clear evolution of core competencies from the embedded sustainability strategy and the reader is convinced that the company can facilitate a transformation. Finally, the slidedeck was very professional and coherent with just the right amount of content on the slides. The group uses the notes section when necessary. The oral presentation was done very professionally. Group members presented well and demonstrated strong knowledge of the details supporting the slides.

B/B+: Groups provided useful information about the company. Insightful themes were identified from the competitor and institutional analyses of the student assignments. While there were general themes highlighting how competitors are responding to pressure to be more sustainable, they were a bit incoherent and difficult to understand in terms of what it means for the assigned company. For institutional forces, the group struggled to summarize those that should be prioritized for the assigned company and/or they didn't quite incorporate the feedback received from Assignment 1. For expanding the value pool, the group's application of key concepts was inconsistent. They understood the idea of expanding the value pool generally, but missed some key parts of this endeavor as presented by course material. The group struggled to truly identify a competitive advantage for the company or, if they did, the arguments weren't very convincing that this would ensure value capture. The group struggled to identify what was meant to be transformed and didn't quite understand what the transformational strategy meant in the context of stealing market share. The

application of concepts that provided the necessary insight for how to transform institutional forces were used but not very effectively and/or unconvincingly. The slide deck was nicely put together with some minor issues here and there. The group presented well.

C/C+: Groups provided incomplete information about the company. It was very hard to identify relevant competitor information that stemmed from the individual assignments. The group struggled to identify the relevant institutional forces in that they didn't have much bearing for the assignment. The group did not convince the audience that it understood what expanding the value pool meant and failed to properly apply any of the key components of this concept. There was little or no mention of competitive advantage and/or the group simply didn't understand what competitive advantage meant. In all, the group really struggled to demonstrate what an embedded strategy means for the firm and how such a strategy can be profitable. The group failed to identify what was being transformed and did not convince the audience that their transformational strategy would challenge key institutional forces that would make it difficult for their company to succeed. There was little recognition of the need to evolve core competencies to deploy this strategy. The oral presentation was poorly done, poorly rehearsed and very unprofessional. The slide deck had key information but was not presented effectively.

Exercise Due: Peer Evaluation.

⧖ **Due Date: TBD** at 08:30am EST

The best time to deal with issues within a group is when it appears, rather than when the final project is due. If team members experience disagreement that they cannot resolve themselves, they should speak with the instructor. To ensure that the team members each deliver on their commitments to the project, a formal peer evaluation process will be used. Criteria for the peer evaluation include:

- Attendance and participation at team meetings
- Preparation for meetings
- Cooperativeness in getting work done
- Time and effort put into the project
- Timeliness and quality of the work
- Use of interpersonal and group dynamic skills
- Any other elements of teamwork.

Each member of the group will evaluate their respective group members (including themselves) on a scale of 1 to 5 based on the criteria above. Take this very seriously, because I do. I will consider this input in assigning the final grade of the student whereby an adjustment to an individual student's assignment grade could be as much as 2 grade points (e.g. A turns into a B+).

Download the below peer evaluation form. Complete the form and submit it here on Canvas.

Peer Evaluation Form.docx ↓ **(https://schulich.instructure.com/courses/8032/files/815338/download?download_frd=1)**

Exercise Due: Profit and the Public Good.

⧖ **Due Date: TBD** at 08:30am EDT

Exercise Due: Your Covid-19 Response Type.

⧖ **Due Date:** Fri TBD at 08:30am EDT

Exercise Due: Patagonia Case Analysis.

⧗ **Due Date:** TBD at 08:30am EST

Exercise Due: Veta la Palma and Complexity Theory.

⧗ **Due Date:** TBD at 08:30am EST

Exercise Due: What is Your Sustainability Passion?.

⧗ **Due Date:** TBD at 08:30am EST

Exercise Due: Negative Externalities.

⧗ **Due Date:** TBD at 08:30am EDT

Exercise Due: YU Ranch Case Analysis.

⧗ **Due Date:** TBD at 08:30am EST

Exercise Due: McDonald's and Poverty .

⧗ **Due Date:** TBD at 08:30am EST

Exercise Due: Social Movements and Market Rebels.

⧗ **Due Date:** TBD at 08:30am EST

Exercise Due: TerraCycle Case Analysis.

⧗ **Due Date:** TBD at 08:30am EDT

Exercise Due: Honey Care and Institutional Entrepreneurship.

⧗ **Due Date:** TBD at 08:30am EDT

Exercise Due: Creating Shared Value.

⧗ **Due Date:** TBD at 08:30am EDT

Exercise Due: Honey Care Case Analysis.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: Southside Restaurant Wine Bottle Assessment.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: Assessing Sustainability of a Company.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: Financial Literacy Quiz.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: Analysis of Meridian Credit Union.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: Who is to Blame for the Obesity Epidemic?.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: PepsiCo and Obesity.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: Nike Case Analysis.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: Facebook Case Analysis.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: Calculate and Submit Your Ecological Footprint.

⏳ **Due Date: TBD** at 08:30am EDT

Exercise Due: Business and Sustainability Course Student Survey.

⧖ **Due Date: TBD** at 08:30am EDT

Exercise Due: Tata Chemicals Case Analysis .

⧖ **Due Date: TBD** at 08:30am EST

Exercise Due: Fast Fashion and Paradox.

⧖ **Due Date: TBD** at 08:30am EST

WRITTEN ASSIGNMENTS: EVALUATION

Please see assignments tab on Canvas for details on assignments.

CALCULATING COURSE GRADE

For this course, students will receive numerical grades for their performance across all evaluation components. Schulich does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Consequently, conversions within this course will be as follows:

GRADING SCHEME

A+	100%	to	89.5%
A	< 89.5%	to	84.5%
A-	< 84.5%	to	79.5%
B+	< 79.5%	to	75.5%
B	< 75.5%	to	71.5%
B-	< 71.5%	to	67.5%
C+	< 67.5%	to	61.5%
C	< 61.5%	to	55.5%
C-	< 55.5%	to	49.5%
F	< 49.5%	to	0%

CLASS-BY-CLASS SYLLABUS

Module 1 - Introduction to Business and Sustainability

Sep 16/22 | Overview: Introduction to Business and Sustainability

Welcome to the course entitled Business and Society (SUST 2060). The course begins with an interactive team-based simulation exercise that is meant to illustrate how business denial of broader responsibility can result in major environmental externalities. We'll use the simulation to set the context for the course and to introduce some of the foundational concepts and frameworks.

Preparatory Work
  1. Exercise Due: Complete Business and Society Course Survey **here**
  2. Exercise Due; Calculate and submit your ecological footprint **here**
  3. Exercise Due: Your Covid-19 Response **here**
  4. Watch the Simulation Instructional Video **here (https://forio.com/simulate/mit/fishbanks/simulation/login.html)** (click on "View Instructional Video")

Module 2 - Profit and the Public Good

Sep 23/22 | Overview: Profit and the Public Good

In this module, we'll take a close look at Facebook where the boundaries of their responsibility to society have been especially fluid for them in the last 10 years. We'll compare their journey to Nike to demonstrate a common pattern that businesses seem to take when faced with pressure from society to act more responsibly. We'll link these cases back to the simulation to round out the first sustainability strategy companies pursue that ultimately asks whether the pursuit of profit is good for society.
  1. Exercise Due: Profit and the Public Good (available **here**)
  2. Read Case: Nike's Sustainability Journey (available **here) (https://www.organizingforsustainability.com/single-post/2018/09/27/Nike-The-Sustainability-Journey)**
  3. Exercise Due: Nike Case Analysis (available **here**)
  4. Read Case: Facebook: Fake News, Free Speech, and the Internet Platforms Responsibility (available in your digital coursekit)
  5. Exercise Due: Facebook Case Analysis (available **here**)
  6. Exercise Due: Negative Externalities (available **here**)

Module 3 - The Five Sustainability Strategies

Sep 30/22 | Overview: The Five Sustainability Strategies

In this class, we'll take a close look at PepsiCo, a giant in the food and beverage industry, that has been highly criticized for a rather blatant neglect of social and ecological systems – particularly those related to obesity and health. We'll examine the feasibility of the PepsiCo's efforts to represent a solution to the obesity epidemic. To do this, we'll introduce 5 strategies companies use to respond to pressures to be more sustainable that we'll commonly refer to for the remainder of the course.
  1. Exercise Due: Who is Most to Blame for the Obesity Epidemic? Available **here**

2. Read: PepsiCo's Turning Point: Identifying a Role in a Sustainable Society (available in digital coursekit)
3. Read: Business Strategies for Sustainability available **here** **(https://www.organizingforsustainability.com/resources)**
4. Summary Table of Strategies for Sustainability available **here** ↓ **(https://schulich.instructure.com/courses/8032/files/815340/download?download_frd=1)**
5. Exercise: PepsiCo and Obesity (available **here**)

Module 4 - Institutional Theory

Oct 7/22

Overview: Institutional Theory

In this class we'll look at the financial services industry in Canada, an industry that many would argue has a particularly important responsibility for the economic pillar of sustainability. Specifically, we'll look at Meridian Credit Union, an increasingly popular financial institution that is challenging Canada's big banks. In preparation for this class, students will learn about institutional theory, a framework meant to help us understand the forces that challenge meaningful shift to a more sustainable society and thus make it hard for companies to be leaders in sustainability.

1. Read: Institutional Theory (stop reading once you reach "Organizational Fields and Institutional Logics") available **here** **(https://www.organizingforsustainability.com/single-post/2018/01/11/Institutional-Theory)**
2. Institutional Theory Summary Table available **here** ↓ **(https://schulich.instructure.com/courses/8032/files/815341/download?download_frd=1)** (for your reference only)
3. Exercise Due: Financial Literacy (Pretend) Quiz (available **here**)
4. Read Case: Meridian Credit Union: Taking on the Big Banks) (available in digital coursekit)
5. Exercise: Analysis of Meridian Credit Union (available **here**)

Module 5 - Measuring Sustainability

Oct 14/22

Overview: Measuring Sustainability

At this point in the course, it's important to look at evaluating a company's adoption of sustainability. To do this, we'll begin this class with the Life Cycle Analysis. How far a product travels, the types of ingredients used in the product, the working conditions of outsourced manufacturers, and the treatment of rural farmers all represent examples of things to consider when measuring a product or service life cycle. We'll apply the framework to Southside Restaurant, a company that is trying to decide which bottle of wine to add to a restaurant's wine list; using the wine industry as a context through which to apply the concept. The Life Cycle Analysis sets us up for a broader discussion of how to evaluate a company's adoption of sustainability by measuring their performance. We'll introduce and apply a framework that will act as an important tool for your first assignment.   We'll end the class with a short quiz that counts towards your asynchronous point score.

1. Read Case: Southside Restaurant: Creating a Low Carbon Wine List (available in digital coursekit)
2. Exercise Due: Southside Restaurant Wine Bottle Assessment (available **here**)
3. Read: Evaluating Company Sustainability Performance (available **here** **(https://www.organizingforsustainability.com/sustainability-reporting)**)
4. Exercise Due: Assessing Sustainability of Your Chosen Company (available **here)**

Module 6 -Co-Creating Value

Oct 21/22

Overview: Co-Creating Value

Our focus now shifts to companies that have embedded sustainability and/or are looking to transform institutional forces that are at odds with sustainability. In this class, students will be introduced to social entrepreneurship, a concept that has emerged in popularity in the last few decades to fill the wide gap in the ability of existing organizational forms (e.g. public companies, for-profit companies) to effectively respond to social and ecological issues. We'll take a look at a couple of examples of social entrepreneurship before spending time on a social enterprise known as Honey Care Africa (HCA). HCA set out to revolutionize the beekeeping sector in Kenya by linking the rural poor to market opportunities associated with honey consumption. We'll explore how our conceptualization of value creation and value capture changes when sustainability is front and centre to the business. Specifically, we'll use this case to introduce the creating shared value framework introduced by Michael Porter and Mark Kramer.

Preparatory Work (complete in time for synchronous class)
1. Read Article: Creating Shared Value (Porter and Kramer; Harvard Business Review: pages 62-77) - To Access: Click **here** **(https://researchguides.library.yorku.ca/HBR)** , Search for "Creating Shared Value" in box on left of your screen
2. Exercise Due: Creating Shared Value (available **here**)
3. Read Case: Honey Care Africa: A Different Business Model (available in coursekit)
4. Exercise Due: Honey Care Analysis (available **here**)

Module 7 - Institutional Entrepreneurship

Nov 4/22

Overview: Institutional Entrepreneurship

In this class, we'll continue our look at companies that embed sustainability but in the context of institutional entrepreneurs. We'll spend a majority of our time looking at TerraCycle, a company that aims to eliminate waste in society. Yet after 15 years, TerraCycle has not turned a profit. The company is struggling to figure out how to balance its desire to eliminate waste with the need to be self-sustained financially. We'll revisit institutional theory by learning about institutional change and institutional entrepreneurship and apply these ideas to the TerraCycle case to advise it on a way forward.
1. Read: Institutional Theory (Read from section entitled "Organizational Fields and Institutional Logics) (available **here** **(https://www.organizingforsustainability.com/single-post/2018/01/11/Institutional-Theory)**)
2. Exercise Due: Honey Care and Institutional Entrepreneurship (available **here**)
3. Watch: Plastics: Last Week Tonight with John Oliver (available **here (https://www.youtube.com/watch?v=Fiu9GSOmt8E)**)
4. Read: TerraCycle: At a Crossroads (available **here (https://www.organizingforsustainability.com/single-post/2017/09/09/TerraCycle-At-a-Crossroads)**)
5. Exercise Due: TerraCycle Case Analysis (available **here**)

Module 8 - Systems Thinking

Nov 11/22

Overview: Systems Thinking

Continuing along our examination of more progressive approaches to adopting sustainability, this class will introduce you to the importance of systems thinking. This is an important concept when we consider the recent focus on systemic racism and indigenous rights. If and when companies become serious about sustainability issues like these, they have to develop the ability to think from a systems perspective. In this class, we'll spend some time reflecting on these issues, focusing specifically on sustainable fisheries, poverty and systemic racism and their relevance to business' role in society.

1. Read: Complexity Theory (available **here** **(https://www.organizingforsustainability.com/single-post/2016/11/17/Complexity-Theory)**)
2. Watch: How I Fell In Love with a Fish (Ted.com) (available **here) (https://www.ted.com/talks/dan_barber_how_i_fell_in_love_with_a_fish)**
3. Exercise Due: Veta la Palma and Complexity Theory (available **here**)
4. Read: How Greedy McDonald's Became the Most Effective Poverty Fighter in the Country (Lau, 2018) (available **here) (https://financialpost.com/opinion/how-greedy-mcdonalds-became-the-most-effective-poverty-fighter-in-the-country)**
5. Exercise Due: McDonald's and Poverty (available **here**)
6. Exercise Due: Implicit Race Test (available **here (https://implicit.harvard.edu/implicit/user/agg/blindspot/indexrk.htm)**) - note that no points are awarded for completing this.

Module 9- Decolonization and Indigenation

Nov 18/22

Overview: Decolonization and Indigenization

Decolonization and Indigenization are two very important concepts for business as companies really dig deep to understand the scope of their negative externalities and thus responsibility. We'll look at a mining company in Kenya, operating in a very rural environment, with high levels of poverty in the indigenous community. Through this case, you should see how their approach to poverty in the region, over time, embodied a systems level approach (from last class), which is in stark contrast to the highly reductionist approach that characterized the colonial era. The case will give you an introduction to what it means for business to decolonize and indigenize.

1. Read Case: Tata Chemicals Magadi: Confronting Poverty in Rural Africa (available in Coursekit)
2. Read: Canada must face its deep systemic racism against Indigenous people (Globe and Mail, 2021: available **here (https://www.theglobeandmail.com/business/commentary/article-canada-must-face-its-deep-systemic-racism-against-indigenous-people/)**)
3. Exercise: Tata Chemicals Case Analysis (available **here**)

Module 10 - From an Embedded to a Transformational Sustainability Strategy

Nov 25/22

Overview: From Embedded to a Transformational Strategy

In this class we'll look at YU Ranch, a ranching business located in Tilsonburg, Ontario that embodies principles of sustainability through its focus on environmental sustainability and healthier food. YU Ranch is facing a decision about how they should move forward, a decision that has important implications for their sustainability strategy. The case will provide some insight into how the role of the manager has to evolve over time in its pursuit of sustainability. We'll use this case to introduce

the important role of social movements and the role of managers/leaders as market rebels in challenging institutional forces.

1. Exercise Due: Your Sustainability Passion (available **here**)
2. Read: Market Rebels and Radical Innovation (available **here (http://ezproxy.library.yorku.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=37817517&site=ehost-live)**)
3. Exercise Due: Social Movements and Market Rebels (available **here**)
4. Read Case: YU Ranch: Growing a Sustainable Business (available in digital course kit)
5. Exercise Due: YU Ranch Case Analysis (available **here**)

Module 11 - Business Sustainability and Paradox

Dec 2/22

Overview: Business Sustainability and Paradox

We'll spend this class looking at Patagonia, a company that exists primarily to achieve an environmental objective but uses profit as the means by which to do so. We'll examine how Patagonia's business model balances its three seemingly contradictory goals of causing no unnecessary harm, being profitable, and achieving growth. We'll end with an examination of the Product Lifecycle Initiative; Patagonia's latest and perhaps boldest strategy that challenges the highly institutionalized business fundamentals of maximizing consumer repeat purchases.   We'll connect back to the concept of market rebels from last class in our analysis of this case.

1. Watch: Patriot Act: The Ugly Truth of Fast Fashion (Warning, some explicit language) (available **here   (https://www.youtube.com/watch?v=xGF3ObOBbac)**)
2. Exercise: Fast Fashion and Paradox (available **here**)
3. Read Case: Patagonia (available in digital coursekit)
4. Exercise Due: Patagonia Case Analysis (available **here**)

Module 12 - Group Presentations

Dec 9/22

Overview: Group Presentation

The final group project must be submitted in the form of a slidedeck (maximum 35 slides). Students are encouraged to use the notes section of the slides to add additional detail to the main text on the slides if they feel it is necessary. All groups are required to conduct an oral presentation of their slidedeck. A select number of groups will present their report live in our final synchronous class while the remaining will pre-record their oral presentation and submit them by the start of our last class. Pre-recorded presentations do not require any special editorial enhancements. Those not presenting live will be required to assist in grading those who do present live. All oral presentations (live or pre-recorded) must be completed within a 20 minute time frame.   With this in mind, groups should remain selective on what parts of their slidedeck (and of each slide) to present and should highlight what sections of busy decks the audience should focus their attention on. Put another way, please refrain from presenting all material in the slidedeck and from submitting two separate slide decks (one for submission and one for the presentation). Be selective and pick those elements that contribute to a high-quality presentation. 20% of your grade for this project is therefore based on the quality and sequence of the slide deck along with the effective and professional means by which they were presented. Not all group members are required to present in the oral presentation.

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

20% of your grade is allocated to canvas exercises. The objective of this assessment is to provide students with credit for completing course material. Canvas exercises work may be completed prior to class to give you the opportunity to prepare for our class discussions, during class, or after class to give you the opportunity to reflect on and apply what we have covered in class. All exercises are posted on Canvas with due dates/times. Exercises include multiple choice questions, short quizzes, questions that test your application of concepts/frameworks, among others. For each exercise, students will be assessed and provided a point score. Points are earned throughout the semester and the student's score out of the total possible points earned determines their grade out of 20. Students will be penalized 1 grade point for a given exercise for every day that it is late. The general spirit of this assessment is to keep you engaged in the content as we progress through the semester and to provide you with credit for this engagement.

Class Participation (contribution)

Course Participation (10%)

Students are expected to participate by engaging in class discussion and participating in live exercises, course discussion board, and small group discussions. I score your level of engagement by reflecting on your comments made in class, reading the discussion board and chat logs (for zoom classes if applicable) and assessing your level of participation in small group settings. For any zoom classes, students are not required but encouraged to have their cameras on. Students are also invited to start and participate in canvas discussion boards on topics related to the course. Students receive a score out of 4 for each class. Totaling your score, I calculate your final grade for synchronous participation out of 10.

Generally, course participation is graded as follows:

Grade	Participation
4 A/A+	Strong participation in classes through active and strong contribution to the discussion, the online chat log (if applicable) and Canvas discussion board, consistent participation in polls and other live exercises, and a strong contributor in small group discussions. Contributes by analyzing/applying course material within a class and by applying relevant concepts from previous classes and is willing to take risks in attempting to answer difficult questions. Overall, the student's participation significantly improves the learning of their peers.
3 B+/A-	Good participation in classes through moderate and good contribution to the discussion and/or the online chat log (where applicable) and/or Canvas discussion board, consistent participation in polls and other live exercises, and a good contributor to small group discussions. Contributes with answers to the questions posed in class and/or builds on or challenges comments made in class, discussion board, chat log and in small groups in ways that elicit student learning. Overall, the student's participation is important in helping move the discussion along.
2 B-/B	Minimal participation in classes with some contribution to the discussion, minimal activity on the online chat log (where applicable) and Canvas discussion board, good participation in polls and other live exercises, and basic contribution to small group discussions. Contributes to discussion, but at a basic level – e.g. provides topical information, factual information from the reading/case, summarizes facts and asks basic questions for clarification.

| 1 | Attends classes but generally does not participate in the discussion with low activity on the online chat log (where applicable) and Canvas discussion board, partial participation in polls and other live exercises, and little contribution in breakout groups. |
| C/C+ | |

| 0 | |
| F | Does not attend classes with no contribution on the Canvas discussion board. |

GENERAL SCHULICH ACADEMIC POLICIES

Grading

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1. Elective courses are expected to have a mean grade between 5.2 and 6.2.

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor.

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

Academic Honesty

Academic honesty is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may also be found on Schulich website: **http://schulich.yorku.ca/current-students/academic-honesty/ (http://schulich.yorku.ca/current-students/academic-honesty/)**

Accommodations

For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services. For counseling & disability services, contact Student Services or see **http://accessibility.students.yorku.ca/   (http://accessibility.students.yorku.ca/)** .

Exams (Absence from)

Midterm

Students who miss a mid-term examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence*. Instructors may request that students submit a copy of their documentation to Student & Enrolment Services. Accommodations and/or re-scheduling of the mid-term exam will be left to the discretion of the course instructor with the expectation that the case be resolved within 14 calendar days.

Final

Within 24 hours of missing a final examination students must contact their course instructor. Students must also submit a completed Deferred Standing Request Form within 48 hours online. Formal documentation* (e.g. Counselor's Statement, death certificate, etc.) regarding the reason for missing the exam must be submitted electronically via file upload as part of the form. The Deferred Standing Request form can be found at **https://schulich.yorku.ca/exam-deferral   (https://schulich.yorku.ca/exam-deferral)** . Student & Enrolment Services will notify the instructor and copy the student by email if appropriate documentation has been received.

For full details regarding exam deferrals, consult the Undergraduate Academic Handbook (pg.30) and/or the Graduate Policy Handbook (pg. 23).

* Currently, students are not required to submit a doctor's note or an Attending Physician's Statement in support of missed midterms, exams and/or requests for deferred standing for courses impacted by the COVID-19 situation. If you haven't already done so, we strongly encourage you to connect with your course instructor(s) first to make other arrangements to complete outstanding work, as a deferred standing may not be necessary.

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together (https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

As pandemic-weariness increases, instructors and students are encouraged to uphold compassion, kindness, empathy, and a sense of responsibility towards one another amid such uncertainty and strain. Students are reminded of their duties and responsibilities to uphold professional and respectful interactions with their instructors and classmates, including, but not limited to: the University's zero tolerance for inappropriate conduct in virtual forums; the safeguarding of people's intellectual property; and our collective responsibility to protect academic honesty at all times but especially in those situations when we face difficulty and stress, or when there is opportunity or temptation to cheat. These points, and others, are addressed in the **University's Senate Policy on Academic Honesty (https://www.yorku.ca/secretariat/policies/policies/academic-honesty-senate-policy-on/)** and **Code of Students Rights and Responsibilities** **(https://oscr.students.yorku.ca/student-conduct)** .

Student Rights and Responsibilities

York University is a place of teaching, research, and learning where people value civility, diversity, equity, honesty and respect in their direct and indirect interactions with one another.

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities (https://secure.students.yorku.ca/pdf/CodeofRightsandResponsibilities.pdf)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

Violations of community standards are taken seriously and investigated by the Office of Student Community Relations and other appropriate parties (**http://oscr.students.yorku.ca/** **(http://oscr.students.yorku.ca/)**). For details on how to handle a breach of community standards, visit the Office of Student Community Relations website at: **https://oscr.students.yorku.ca/student-conduct** **(https://oscr.students.yorku.ca/student-conduct)** . Every student agrees by the act of registration and enrolment to be bound by the regulations and policies of York University and of the Schulich School of Business.

Take time to fully review the Code of Student Rights and Responsibilities:
https://secure.students.yorku.ca/pdf/CodeofRightsandResponsibilities.pdf
(https://secure.students.yorku.ca/pdf/CodeofRightsandResponsibilities.pdf)

*** Please note that academic policies specific to this course may be contained in other parts of this course outline.*

These course materials are designed for use as part of this course at York University and are the

To: Faculty Council, Schulich School of Business
From: David A. Johnston, Director Master of Supply Chain Management and OMIS Course Director for MSTM 5210
Date: April 1, 2023
Re: **Minor Changes to MSTM 5210 Design and Management of Organizational Processes**

Motion: Change Course Number and Abstract for MSTM 5210 Design and Management of Organizational Processes Effective Winter Semester 2024

Rationale: MSTM 5210 Design and Management of Organizational Processes was originally designed for the Master of Management program in 2015 by the OMIS area. This 12-week course was based on the 6-week MBA course OMIS 5210 Operations Management. Since then, the course content, pedagogy and administration has evolved without changing the overall course objectives that were originally approved. In addition, the course was adopted in 2019 for the Master of Supply Chain Management and for the new Master of Health Industry Administration (MHIA) program. Here are the three specific changes and their rationales:

1. **Change the course title from MSTM 5210 to OMIS 5212**. This clearly identifies the course as the responsibility of the OMIS area to staff and curate the content. Changing the course number removes any confusion of this 12-week course with the 6-week core MBA course.

2. **Add the term BLEN to the course description reflecting that it can be delivered both in-class and on-line.** Add the term BLEN to the course description reflecting that it can be delivered both in-class and on-line. This is in conformance with "Update to ONCA Course Code Definition" November 16, 2022.   The Master of Management program has been teaching the course predominately in-person. The Master of Supply Chain program has taught the course for the most part asynchronously on-line since the onset of the Covid 19 pandemic in Winter 2020. Experience to date suggests that learning objectives and content is the same in both formats and accommodates flexibility in delivery while not compromising learning quality. The BLEN designation best reflects the current design and delivery of the course and preserves the potential for future pedagogical innovation in the delivery of this course. (Please see "Update to ONCA Course Code Definition".)

3. **Change the wording of the abstract to better reflect the content of the course and its emphasis in the long-term sustainability of organizational operations**. Please see the attached Course Change form.

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:

Master of Supply Chain Management

2. Responsible Unit:

OMIS

3. Subject Code (Rubric) and Course Number:
MSTM 5210

4. Credit Value:
 3.00

5. Long Course Title:

MSTM 5210 Design and Management of Organizational Processes

6. Short Course Title:
This is the title that will appear on University documents where space is limited, such as transcripts and lecture schedules. The short course title may be a maximum 40 characters, including punctuation and spaces.

MSTM 5210 Design and Management of Organizational Processes

7. Type of Course Change(s) (indicate all that apply):

X	in course number
	in credit value **(provide course outline)**
	in course title **(provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)**
X	in course description **(provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)**
	in learning objectives/outcomes **(please append the program's existing learning outcomes as a separate document)**

		in integration **(please provide statement of approval from relevant undergraduate coordinator or Chair)**
		in cross-listing **(please provide statement of approval from another program)**
		in pre/co-requisite
		retire course
X	X	other **(please specify) 1. Change Rubric to OMIS. 2. Add a blended delivery mode format to the course**

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

Winter 2024

9. **Rationale:**
Please indicate how the proposed change will contribute to the academic objectives of the course/program. Please provide a description of the amended learning outcomes/objectives for the course, if applicable. Additionally, please indicate if the course is presently inactive, active, or retired. Finally, please append the program's existing learning outcomes as a separate document.

MSTM 5210 Design and Management of Organizational Processes was originally designed for the Master of Management program in 2015 by the OMIS area. This 12-week course was based on the 6-week MBA course OMIS 5210 Operations Management. Since then, the course content, pedagogy and administration has evolved without changing the overall course objectives that were originally approved. In addition, the course was adopted in 2019 for the Master of Supply Chain Management and for the new Master of Health Industry Administration (MHIA) program. Here are the three specific changes and their rationales:

1. Change the course title from MSTM 5210 to OMIS 5212. This clearly identifies the course as the responsibility of the OMIS area to staff and curate the content. Changing the course number removes any confusion of this 12-week course with the 6-week core MBA course.
2. Add the term BLEN to the course description reflecting that it can be delivered both in-class and on-line. This is in conformance with "Update to ONCA Course Code Definition" November 16, 2022. The Master of Management program has been teaching the course predominately in-person. The Master of Supply Chain program has taught the course for the most part asynchronously on-line since the onset of the Covid 19 pandemic in Winter 2020. Experience to date suggests that learning objectives and content is the same in both formats and accommodates flexibility in delivery while not compromising learning quality. The BLEN designation best reflects the current design and delivery of the course and preserves the potential for future pedagogical innovation in the delivery of this course. (Please see "Update to ONCA Course Code Definition".)
3. Change the wording of the abstract to better reflect the content of the course and its emphasis in the long-term sustainability of organizational operations.

10. Proposed Course Information:

Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

Existing Course Information (Change From):	Proposed Course Information (Change To):
~~MSTM 5210~~ Design and Management of Organizational Processes	**OMIS 5212** Design and Management of Organizational Processes
~~This course involves a critical examination of the most important ideas and practices used by organizations to design and implement competitive processes~~. ~~This includes six sigma lean, supply chain management, project management and the adoption of new technology. This also involves consideration of the role of customers, employees and suppliers. The goal is safer, greener, more cost effective and better quality products and services~~	**This course examines critically the most important ideas and practices used by organizations to design and implement effective processes. This includes quality, lean, supply chain and project management concepts and technology. Important stakeholders such as customers, employees and suppliers are considered. The goal is to secure the availability of enough sustainably produced, cost effective, quality goods and services.**

11. Enrolment Notes:

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

Unchanged

12. Consultation:

For changes in integrations and cross-listings, as well as changes to courses that are integrated and/or cross-listed, please provide evidence that appropriate consultation has taken place.

Originator:

David A. Johnston	March 30 2023
Signature	Date

David A. Johnston	OMIS
Name	Area or Specialization

Approvals:

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

	Master of Supply chain
David Johnston	Management
Signature	Date

	Master of Management
Luke Zhu	
Name	Area or Specialization

	Master of Health Industry
Amin Mawani	Management
Name	Area or Specialization

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

David Johnston	March 30, 2023
Signature	Date

	Master of Supply Chain
David Johnston	Management
Name of Program Director	Program

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

Kevin Tasa	May 4, 2023
Signature	Date

Kevin Tasa	Master Program Committee
Name of Committee Chair	Committee

![Schulich School of Business logo]

MSTM5210   **W2023**   **CREDITS: 3.00**

MSTM 5210 H - DESIGN AND MANAGEMENT OF ORGANIZATIONAL PROCESSES

🕐 THU 08:30 - 11:30   🏠 SSB N109

Office Hours

The instructor will arrange for ZOOM meets and/or virtual office hours with Groups or individuals by appointment.

INSTRUCTOR
Ed Burns

✉ eburns@schulich.yorku.ca

ⓘ 416.736.2100 Ext. 55074

🏠 S337 SSB

ADMIN
Paula Gowdie Rose

✉ pgowdierose@schulich.yorku.ca

ⓘ 416.736.2100 Ext. 44150

🏠 S337D SSB

Monday, February 20, 2023: Family Day - University Closed

Graduate Reading Week: Tuesday, Feb 21-Friday, 24, 2023 - No Classes

Friday, April 7, 2023: Good Friday - University Closed

Tuesday, April 11, 2023 - Study Day

Wednesday, April 12-Tuesday, 18, 2023 - Final Exams

NOTE: The last class session is scheduled Monday, April 6, 2023

"OPEN TO MASTER OF MANAGEMENT (MMgt) STUDENTS ONLY"

ED BURNS BIOGRAPHY

Ed Burns' career has included senior positions as a Vice President with SNC Lavalin a global engineering services corporation, and CEO of a Tier 1 supplier to leading corporations in the EMS sector, such as HP, Cisco, Qualcomm, Nokia, Motorola Celestica, Flextronics etc. Ed spent most of his career with Canadian Pacific Limited (CP), where he created and led the Management Services (MS) group, which became one of of the largest internal operations performance improvement groups in North America, and has been a Business Operations Analyst at Black and Decker, and an Electronic Engineer with Philips Electronics in Europe. As well as running his own online business, he is currently teaching MBA, IMBA, Master of Management and Master of Supply Chain Management programs in Operations Management, Supply Chain Management, Change Management, Information Technology, and Management of Technological Innovation at Schulich School of Business. He is also teaching Courses in BPM and Change Management at the School for Continuing Studies University of Toronto for experienced managers and professionals. Ed holds an MBA from the University of Manchester Business School and an Honours Degree in Applied Physics from the University of Bradford.

Ed lives in Collingwood Ontario. When not working online, teaching in class and running his online business, enjoys Cycling, Kayaking and Fishing

BRIEF DESCRIPTION

This course involves a critical examination of the most important ideas and practices used by organizations to design and implement competitive processes. This includes six sigma lean, supply chain management, project management and the adoption of new technology. This also involves consideration of the role of customers, employees and suppliers. The goal is safer, greener, more cost effective and better quality products and services.

COURSE LEARNING OUTCOMES

Organizations, whether in manufacturing, service, nonprofit or public sectors are composed of bundles of processes that must accomplish tasks and work together effectively and efficiently. People, materials and information must be configured into responsive supply networks within and between organizations to create value for key stakeholders such as customers. In this course we cover some of the basic yet powerful ideas from operations management on how to improve organizational processes, reduce costs, improve quality, improve service levels, and yet still be flexible in the face of rapid and sudden change. The focus is on not only basic tools and techniques for getting work done with processes, and on the key trade-offs that managers must make when designing internal processes and supply chains. We will examine current issues around harnessing information technology to support better processes, and finally how to assess and mitigate risk from an operations perspective.

The fundamental managerial task in achieving best practice in operations is to correctly match the capabilities of administrative, manufacturing and service processes to the needs of internal and external customers.

1. Provide a process-centric view of the organization and its supply network.
2. Describe how the structure of processes influences organizational performance.
3. Acquire generic process analysis skills to describe and improve process performance.
4. Introduce techniques for improving process performance and controlling quality & variability in process outcomes, such as lean and six sigma quality concepts.
5. Introduce best practice concepts for managing international supply networks.
6. Understand how organizations manage inventory, and forecast, schedule and monitor the flow of goods and services between them and their customers and suppliers.
7. Acquire basic project management skills to effectively plan and execute large projects.
8. Explain how information technology can be best used to support process.
9. Understand how to begin to identify, discuss and mitigate operational risks.
10. Develop skills in presenting analysis of organizational processes to a managerial audience.

This course utilizes cases from real world companies and emphasizes the importance of students working with their individual and group experiences to develop their ability to think and talk credibly about operations. Over and above this, we will also begin to weave in overarching issues such as environmental/social responsibility and sustainability of operations.

COURSE MATERIAL

The Course CANVAS has been created for this course. It contains general information for Schulich students and information and materials specific to this course. Check it frequently before and after each class.

Materials for this course include:

- A required textbook
- Case studies that you will either purchase online or download from the course CANVAS and a simulation you will access online via CANVAS
- Access to Course Canvas LMS

The course text is Heizer - Operations Management - Sustainability and Supply Chain Management - 3rd Canadian Edition. Make sure you get the 3rd edition as content has been shifted around from the second edition. A limited supply of copies is available in the York U Bookstore, though in the interests of the environment, we recommend the online ebook version. Instructions to acess the ebook are in the first Module titled - Instructions to Purchase Online Text - W23, and posted in Class 1.

Some course materials will be posted on CANVAS. You will also be required to purchase a small coursepack of case materials for $31.95 on-line from Ivey Business School Publishing at

https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c00000EIlHFEA1

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Individual Participation (58 points equivalent to 10 %) 10%			
First to Confirm Online Course Text Access - NOW CLOSED	👤	0.17%	
Intro ! - Please introduce yourself via a discussion board post	👤	0.17%	Thu Jan 26, 2023 at 11:59pm EST
Individual Classroom Participation to Mid Term (Classes 1 thru 6)	👤	4.14%	
Individual Classroom Participation to End of Course (Classes 8 thru 12)	👤	3.45%	
Pro Rated % of 3 Participation Points for INTERIM Course Evaluation	👤	0.52%	Sun Feb 19, 2023 at 11:59pm EST
Pro Rated % of 5 Participation Points for FINAL Course Evaluation	👤	0.86%	
Foodservice Operations Project 15%			
Foodservice Operations Project - Outlet Proposal - Milestone	👥	1%	Thu Feb 9, 2023 at 11:59pm EST
Foodservice Operations Project - Group Presentation	👥	7%	Thu Mar 30, 2023 at 09:00am EDT
Foodservice Operations Project - Final Report	👥	7%	Thu Apr 6, 2023 at 11:59pm EDT
Midterm Exam 35%			
Midterm Exam	👤	35%	Thu Mar 2, 2023 at 11:59pm EST
Group Participation - Case/Readings Presentations to Class & Other Group Work 20%			
Group Participation - Case Readings/Presentations To Class	👥	10%	
Class 8 - Group Take Home Assignment in Project Management	👥	5%	Wed Mar 15, 2023 at 11:59pm EDT
Class 10 - Group Take Home Assignment on Risk Management	👥	5%	Mon Apr 10, 2023 at 11:59pm EDT
Operations Management Simulation (Littlefield Labs) 20%			
Littlefield Labs Simulation - Group Score	👥	10%	

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Littlefield Labs - Individual Learning Report	👤	5%	Mon Apr 10, 2023 at 11:59pm EDT
Littlefield labs - Group Dynamics Report	👥	5%	Mon Apr 10, 2023 at 11:59pm EDT

WRITTEN ASSIGNMENTS: DESCRIPTIONS

First to Confirm Online Course Text Access - NOW CLOSED.

Intro ! - Please introduce yourself via a discussion board post.

⏳ **Due Date:** Thu Jan 26, 2023 at 11:59pm EST

Please post a brief intro to introduce yourself to your classmates and the instructor. You can mention where you are, what you hope to learn from this course, a bit about your career to date, and ultimately what your goals are. A brief para is all that is required.

This will count towards individual participation (recorded under participation)

NOTE; This will only be available for two weeks from the course start date.

Individual Classroom Participation to Mid Term (Classes 1 thru 6).

In the interests of transparency I will generate individual grading in two parts i) up to Mid term , and ii) from Mid term until end of course)

The participation grade recognizes your contribution to the education of the class while in class. Good class participation by all class members is necessary in order to get the most out of the cases and readings. You are encouraged to take advantage of this gathering of your peers to improve your communication skills and obtain feedback on your views in a relatively low-risk environment.

This instructor will take attendance for each class, and participation marks will graded using the following schema.

0 = not attended, no heads up to instructor
1 = not attended, heads up to instructor in advance of class start
2 = attended, silent
3 = attended, minor contribution
4 = attended, major contribution to discussion

Max: 4 points per class total of 24 points
4+ classes missed (in total) = course failed

No makeup exercises will be allowed to make up for missing attendance

Being excused a part or whole of a class with permission means you get a "1" for class participation

By all means ask questions of the class content on the slide decks and also of the points the instructor makes in class. Ask for further explanation & clarifications. Provide examples of what is being discussed in class with real-life examples of the same issue/problem/opportunity discussed with the instructor.

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

People often vary as to their level of confidence and ability in speaking for various reasons. The instructor is aware of this and will try to help where possible.

Individual Classroom Participation to End of Course (Classes 8 thru 12).

In the interests of transparency I will generate individual grading in two parts i) up to Mid term , and ii) from Mid term until end of course)

The participation grade recognizes your contribution to the education of the class while in class. Good class participation by all class members is necessary in order to get the most out of the cases and readings. You are encouraged to take advantage of this gathering of your peers to improve your communication skills and obtain feedback on your views in a relatively low-risk environment.

This instructor will take attendance for each class, and participation marks will graded using the following schema.

0 = not attended, no heads up to instructor
1 = not attended, heads up to instructor in advance of class start
2 = attended, silent
3 = attended, minor contribution
4 = attended, major contribution

Max: 4 points per class total of 24 points
4+ classes missed (in total) = course failed

No makeup exercises will be allowed to make up for missing attendance

Being excused a part or whole of a class with permission means you get a "1" for class participation

By all means ask questions of the class content on the slide decks and also of the points the instructor makes in class. Ask for further explanation & clarifications. Provide examples of what is being discussed in class with real-life examples of the same issue/problem/opportunity discussed with the instructor.

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

People often vary as to their level of confidence and ability in speaking for various reasons. The instructor is aware of this

and will try to help where possible.

Pro Rated % of 3 Participation Points for INTERIM Course Evaluation.

⧗ **Due Date:** Sun Feb 19, 2023 at 11:59pm EST

The instructor will award 3 points pro-rated to the % completion of the interim course evaluation. So for instance if 90 % if class completes an evaluation, everyone in the class will receive 90 % of 3 points = 2.7 points

Pro Rated % of 5 Participation Points for FINAL Course Evaluation.

The instructor will award 5 points pro-rated to the % completion of the end of course evaluation. So for instance if 90 % if class completes an evaluation, everyone in the class will receive 90 % of 5 points = 4.5

Foodservice Operations Project - Outlet Proposal - Milestone.

⧗ **Due Date:** Thu Feb 9, 2023 at 11:59pm EST

Please read the document Foodservice Project - IMPORTANT DETAILS and TIPS <u>first</u> for useful information on how to best approach the outlet selection and project, and before you start visiting any outlet.

By the end of the day of the day of Class 5, please upload a pdf document into CANVAS describing the proposed choice of outlet, the name, location (please state cross street or approx street address - as there are dozens of locations of each chain that are available and I don't want to have different groups looking at the same location) *State s*ome brief scaling factors, such as number of employees visible in a typical shift, footprint in Sq meters. No more than a paragraph is required.

Experience has show that teams that make an early choice of outlet, get early approval and start some initial work prior to the mid term, reducing the bunching of deliverables in the last week or two of the semester will do better than groups that postpone working on the project until the last week or two.

A visit by at least one member of the group should be made before the outlet is proposed to ensure the outlet is operational,meets the criteria and is a good subject for study.

If you have questions or concerns about your outlet choice, and/or if there are special circumstances at that outlet which call for further discussion with the instructor, please email the instructor directly before you upload your proposal...

Foodservice Operations Project - Group Presentation.

⧗ **Due Date:** Thu Mar 30, 2023 at 09:00am EDT

Format for the Class Presentations

The format for the Class Presentations should be kept as brief as possible. You will have 15 minutes to present your findings and can allow 5 – 10 minutes for questions. Every group member should present. Please practice your presentation to ensure that it fits within the time requested. A typical presentation should consist of no more than 10-12 slides, and should consist of the following:

- Title Slide with Group Names & Student Numbers
- Project Setting, Brief description of organization setting, scope of project, some scaling facts & figures if you can get them, perhaps some aggregate corporate information if available.
- Process description, flow chart, overview of how the process works, or is supposed to. Try to include as many measures, KPI's and metrics of the process and its impact as possible.
- Problems that you see, what are they and explanation of how they impact the process? Analysis of process, quality, capacity, inventory as required.
- Recommendations for Process improvement
- Impact of recommendations, benefits, costs, risks.. any implementation or sustainability issues?

Important Note; the instructor will randomly select the group presentation order in advance of the classes in which presentations will be held..So work on the assumption you will be presenting in Class 11. Typically we will complete about 6 or 7 group presentations in Class 11, given the usual setup delays.

Please upload your pptx slides after class into CANVAS for grading.

The Instructor reserves right to request peer reviews in instances of free-riding.

Foodservice Operations Project - Final Report.

⧖ **Due Date:** Thu Apr 6, 2023 at 11:59pm EDT

The report should be an expanded and more detailed version of what you presented. In terms of format I am looking for no more than 10 pages, single spaced, no more than about 5000 words, and you can have as many appendices as you like.

Upload the report as a pdf to CANVAS by Midnight of the day of the last class for grading.

The Instructor reserves right to request peer reviews in instances of free-riding.

Midterm Exam.

⧖ **Due Date:** Thu Mar 2, 2023 at 11:59pm EST

The Mid term will be an in-class exam, of 90 minutes duration

- It will be a test on the contents of the first six classes of the course – the core basics including questions on Group Case/Readings Presentations
- It covers all group cases and the course text., though I will focus mostly on the content of the slide decks (Which are the same as the content of the Group Presentations of the readings anyway)
- There will be a mix of MCQ and short essay type questions
- A 2 page paper "cheat sheet" is allowed and a good idea, groups are encouraged to participate in generation of a "cheat sheet" as required/desired.(2 pages meaning both sides of 1 piece of paper)
- A calculator will be required

Group Participation - Case Readings/Presentations To Class.

Groups will be randomly assigned at the start of the course.

Each group will be required to present a summary of the Case and/or Readings they are assigned, in the Class to which they are assigned.(See Group Presentation Schedule in Course Introduction/Orientation).

In order to preserve copyright, the groups presenting are specifically requested i) **_NOT_** to copy any content verbatim from the case.

For the cases; You are expected to apply as much of the course content as you can to each case analysis and answers to questions in the outline.

For readings, Further research and/or more information can be presented as desired, provided the reading questions are answered as a minimum, and as time allows.

After presenting to the Class - students will upload their presentation slide deck into CANVAS for grading by Instructor.

There are NO Group Case/Readings Presentations for Class 1 The instructor will lead the case for that class

Each group case presentation is expected to be 10-20 slides in length for the overview and background, including a slide to answer each specific question raised in the overview for that class. **_You are expected to apply as much of the course content as you can to each case analysis and answers to questions in the Assignment._**

I expect to see each team member presenting part of the presentation. On average I would expect the group presentations to last 20-30 minutes, and I will expect questions to be asked by class and instructor throughout, which will lengthen the total time for the case presentation and discussion to something like 30-40 minutes.

At the conclusion of the presentation and discussions the instructor will summarize key learning, and a short summary of the salient issues and insights..

Since the Mid term may include questions on the Group Case/Readings Presentations, **_students are specifically encouraged to take notes on the highlights of the presentation and discussions._**

The Instructor reserves right to request peer reviews in instances of free-riding.

Class 8 - Group Take Home Assignment in Project Management.

⧖ **Due Date:** Wed Mar 15, 2023 at 11:59pm EDT

This assignment can be done remotely or if the group meets in person after class, or a bit of both as desired.

Group exercise in Project Management (PM). Groups will complete the short assignment in PM, and upload assignment into CANVAS by Midnight of the day before Class 9.

It should take only 1-2 hours, and the instructor will allow time after the formal part of Class 8, to start this assignment.

The Instructor reserves right to request peer reviews in instances of free-riding.

Class 10 - Group Take Home Assignment on Risk Management.

⧖ **Due Date:** Mon Apr 10, 2023 at 11:59pm EDT

There will be a short take home Group exercise in Risk Management. This will be posted in Class 10.

This assignment can be done remotely or if the group meets in person after class, or a bit of both as desired.

It should take only 2-4 hours, and the instructor will allow time after the formal part of Class 10, to start this assignment.

Please upload your completed Group assignment into CANVAS by Midnight of last day of the course

The Instructor reserves right to request peer reviews in instances of free-riding.

Littlefield Labs Simulation - Group Score.

This is an on-line management simulation of the cross functional integration required to manage operational decision making effectively. This will be played in your usual groups. Please see the Littlefield Labs Instructions posted on the COURSE CANVAS. The simulation will be run between Weeks 9 and 10 over multiple days outside of class. Half of the marks for this component will be the groups aggregate ranking in the game.

The simulation will run competitively, and **grading for this component will be normed around the median value of cash at end of game for the class.**

The instructor will review overall team scores and all the various strategies used in a debrief held in Class 10.

There is no requirement to upload anything into CANVAS, as all team data is held within the game itself.

Littlefield Labs - Individual Learning Report.

⧖ **Due Date:** Mon Apr 10, 2023 at 11:59pm EDT

Before Class 10, each student will also prepare an individual 2-3 page (single spaced) learning report reflecting on the decisions made throughout the game. The basis for those decisions, the actions taken and results obtained. The objective of this report is to assess the degree to which individual students utilized core concepts taught in the course to make decisions in the game. For instance you should describe how the group made decisions based on process times, capacity, capacity utilization, forecasting, inventory, and the co-ordination of the operation with sales. A good approach is to decisive the round by round decisions made by the team and the resulting impacts.

TIP: you might want to keep notes on the teams decisions and the underlying rationale for each decision (or not !) as you progress through the game, so you can produce this report quickly.

I have now changed the due date to the last day of the course.

Format is 2-3 pages Max, single spaced minimum 11 point font, 1,000 to 1,500 words

Littlefield labs - Group Dynamics Report.

⧖ **Due Date:** Mon Apr 10, 2023 at 11:59pm EDT

Group work helps individuals learn more about their own strengths and weaknesses, how to motivate others, and the challenges of team-based leadership. It also helps develop collaborative skills, which will be very useful in your academic career and in the workplace.

Before Class 10, each **_group_** will submit a written report describing their team dynamics in completing the project. I am not looking for a repeat of the ILR, and/or how you optimized the process with the specific tools we have learned about. I am looking for what you took away as to how to work as a group and manage operations effectively.

You should include the following;

- How would you describe the process you used in deciding on group leadership and making decisions
- How were various roles assigned and how well it worked
- How you decided on your strategy to play the game
- How key decisions were made during the simulation.
- Assessment of your teams actions and decisions made as the game progressed.
- What did you do that worked (& why ?)
- What did you do that didn't work (& why?)
- What did you learn that was important about making decisions in operations?

I have now changed the due date to the last day of the course.

Format is 2-3 pages Max, single spaced minimum 11 point font, 1,000 to 1,500 words

GRADING SCHEME

A+	100%	to	89.5%
A	< 89.5%	to	84.5%
A-	< 84.5%	to	79.5%
B+	< 79.5%	to	74.5%
B	< 74.5%	to	69.5%
B-	< 69.5%	to	64.5%
C+	< 64.5%	to	59.5%
C	< 59.5%	to	54.5%
C-	< 54.5%	to	49.5%
F	< 49.5%	to	0%

CLASS-BY-CLASS SYLLABUS

Class 1 - Investing In Organizational Processes and Systems

Jan 12/23

Overview: 1 - Investing In Organizational Processes and Systems

Key Learnings
Why a process-centric view of organized work is important
The importance of aligning process and systems to deliver external and internal customer value
How to analyze what is an appropriate organizational process
How to maximize the flow of materials and information to support value creation
The role of information management in enabling effective processes

Read:
You will want to read Heizer Chapters 1 and 2 to get good introduction to the field of operations management. This is not necessary for Class 1 but must be done by the midterm.
For Class 1:
    Read all of Chapter 7
    Read all of Chapter 7 - Supplement - Capacity & Constraint Management
    Investing in the IT That Makes a Competitive Difference (Coursepack)
Case Study: Kristen's Cookies (A1) (Coursepack)

Questions for Class - 1
1. What is a process?
2. Who/how/when does process get defined?

Questions for Class - 2
1. What defines a Process?
2. What are the advantages of having a process?
3. How do you know if you have the "right" process?
4. What happens if you don't have the "right" process?
5. Are there any disadvantages to having process?
6. What are the basic steps in analysing a process?
7. What does process capacity, resource utilization, throughput (flow time) look like in a foodservice outlet?

Questions for Class - 3 - Kristen's Cookies Case Study:
1. How long does it take to fill a rush order?
2. How many orders can you fill a night?
3. How much of your own and your roomies time does it take to fill an order?
4. What changes can you make to this operation to?;
    Make better cookies

    Make more cookies
    Make cheaper cookies
    Make more profit

Questions for Class - 4 - Investing in the IT That Makes a Competitive Difference:
1. What makes a successful IT –enabled process?
2. How do firms become capable of being successful in developing such processes?
3. Why do you think Firms like AMAZON become so successful?

Class 2 - Quality Management

Jan 19/23

Overview 2 - Quality Management

Key Learnings
Definition and measurement of quality
Process variance and its impact on organizational performance
Process capability
Strategies for improving product and process quality
Using total quality and six sigma improvement methods

Read:
Chapter 6 Managing Quality in the textbook.
Supplement 6 on Statistical Process Control in the textbook. Please focus on why and how SPC
works to improve quality versus the details of the formulas for doing control charts, process
capability analysis and acceptance sampling. We are not interested in you memorizing formula.
Group Case Study: Agile Electric: Quality Issues in a Global Supply Chain. (Coursepack)

Questions for Class

1. What is the universal definition of quality?
2. How should quality be managed in most organizational processes? What must be controlled to
   have a quality process?
3. How does variability in processes impact performance for an organization's various
   stakeholders?
4. What are the essential concepts and tools in managing six sigma and other quality
   improvement programs?
5. What is the role of management in quality improvement programs?
6. What does "Quality" look like in Foosdervice Operations

Group Reading Presentation
Present a Summary of Chapter 6 on Managing Quality (You can skim over the Supplement on
Statistical Quality Control)

Group Case Study Questions (Agile Electric):
1. Should the complete recall/field failure and associated costs be charged to the tiered suppliers?
2. Was Automek's decision to source the business from Agile a good one? Did Agile make the right
   call in accepting the contract?
3. Do you see the internal quality practices as having a major effect in the case, considering all the
   supply chain members? Are ISO 9000 and TS 16949 necessary and sufficient conditions for
   adequate process knowledge and diffusion of internal quality practices?
4. Would Agile receive any benefits if it invested resources in developing its suppliers? Who is
   responsible for accelerating the implementation of quality practices in lower-tier suppliers? Why
   were ECPL and BIPL not interested in improving their processes and manufacturing practices?

Please submit your group presentations on the Readings and/or the Case via CANVAS to the
Instructor at the end of the Class for Grading and feedback..

Class 3 - Supply Chain Management

Jan 26/23

Overview 3 - Supply Chain Management

Key Learnings
What is a supply chain?
What key decisions are made in managing supply chains?
How supply chain decisions must align with organizational strategy.
Make versus sourcing strategies.
Customer-supplier collaboration.
Supply chain integration strategies.
How performance is managed in supply chains.

Read:
Chapter 11 Supply Chain Management in the textbook
Supplement 11 - Supply Chain Management Analytics

Group Presentation on Readings
Summarize Chapter 11 and Supplement 11 and present to class

Questions for Class
1. What should drive the choice of supply chain strategy?
2. What is the upside of choosing the right strategy? And the downside of choosing the wrong strategy?
3. What are the critical decisions that make up a supply chain strategy?
4. What is the role of supplier relationships in an organization's performance?
5. How does Supply Chain performance impact a Foodservice outlet?

Group Case Study Questions (New Balance):
1. Evaluate New Balance's current operating strategy. How well does their supply chain choices fit within this strategy?
2. Assuming that the total US market for athletic footwear was 400 million pairs in 2005, how costly was New Balances decision to maintain 25% of its manufacturing in the USA? What is your assessment of this decision?
3. Moving forward, how important is the NB2E initiative for New Balance?

NOTE; Please focus on SC Issues any not marketing or M&A Issues

Please submit your group presentations on the Readings and/or the Case via CANVAS to the Instructor at the end of the Class for Grading and feedback..

Forecasting Demand and Managing Capacity

Feb 2/23 | Overview 4 - Forecasting Demand and Managing Capacity

Key Learnings
Basic methods for forecasting demand
Balancing the risk of over and under investment in capacity
Strategies for reducing the risk of product shortages and denial of service
Structuring operating processes and policies to minimize risks

Read:
Chapter 4 Forecasting in textbook. We will concentrate on the basic models using exponential smoothing and regression and the means of evaluating the quality of the forecast. We will assume you have already been exposed to regression methods in other courses.
Case Study: Sport Obermeyer Ltd. (Coursepack) ⏎ **(https://www.iveycases.com/ProductView.aspx? id=4641)**

Group Presentation
　Group will present a summary of Chapter 4

Questions for Class
1. How useful do you think forecasting actually is?
2. Are there industries where forecasting is either a) more, or b) less useful
3. In the case of a new product introduction – how would you forecast demand for that, with no existing demand data?
4. Do you think that a focus on speed/agility of supply chain can overcome all forecasting problems?
5. How often do you need to forecast?
6. Do you see a role for Forecasting in your Foodservice Outlet?

Group Case (Sport Obermayer)

Group Case Study Questions (Sport Obermayer);
1. Critically evaluate the Order Cycle used by Sport Oberrmayer by drawing a timeline of the order cycle.. Can you suggest any improvements to decrease the lead time required to introduce new products?
2. What general rules would you use to decide what styles you would order in advance of the fashion season, vs which styles you would "wait and see", then react with an order during the season?
3. How desirable is it to be able to produce more of Sport Obermaier's needs after the fashion season starts and demand becomes known?
4. Should Sport Obermayer be sourcing out of Hong Kong or Mainland China? Why?
5. What changes would you make to Sport Obermayer's supply chain to lower the risk of excess inventory and capacity, versus stocking out of popular products?

Please submit your group presentations on the Readings and/or the Case via CANVAS to the Instructor at the end of the Class for Grading and feedback..

Overview 5 - Managing Inventories & Product Availability

Key Learnings
　Why hold inventory?
　Basic inventory models for managing how much to order and hold in inventory
　The use of safety capacity in service businesses
　Strategies to use inventory and capacity effectively to insure product and service availability

Read:
　Chapter 12 Inventory Management in textbook. We will concentrate on sections on the function of inventory, Economic Order Quantity and Safety Stock.

Questions for Class
1. Generally what kinds of measures will tell us how much inventory we have?
2. How would these measures differ for a) Manufacturing, b) Retail, c) Services?
3. If 80-90 % of process Inventory (or WIP) is tied up in delays, what does that imply for an organizations strategy to reduce inventory?
4. What Inventory issues might you see in a foodservice outlet and how would they impact the outlet?

Group Presentation on Readings
　Group will present a summary of Chapter 12 in the textbook

Group Case Study: Evergreen Irrigation Systems, posted on COURSE CANVAS

Class 5 - Managing Inventories and Product Availability

Feb 9/23

Class 6 - Lean Operations

Class 7 - Midterm Exam

Class 8 - Planning

Mar 16/23

and Improving Projects

Class 9 - Managing

Group Case Questions (Evergreen Irrigation):
1. How well is the company doing?
2. How does the order policy of the OEM affect the distributor?
3. How does Evergreen's own systems and decision rules impact its performance?
4. How would you determine whether Evergreen has too much or too little inventory to service their customers?
5. What suggestions do you have for Evergreen's management? (other than drop the OEM)

Please submit your group presentations on the Readings and/or the Case via CANVAS to the Instructor at the end of the Class for Grading and feedback..

Overview 6 - Lean Operations   **Mar 2/23**

Key Learnings:
Define JIT and Lean Operations
Pull versus push process strategies
The Seven Wastes and 5 S Methodology in Process Improvement
The relationship between waste reduction and improved process performance
Lean applied to supply chain relationships
How the Toyota Production System works

In particular we will also discuss how JIT/Lean principles can be applied to analyzing any process, and use the example of a familiar Foodservice operation such as Tim Horton's, Mcdonald, Starbucks etc

Read:
Chapter 16 - JIT and Lean Operations in the textbook.
Case Study: Ethical Dilemma; page 598 textbook (page 636 in ebook)
Case Study: JIT at Arnold Palmer Hospital; page 602 in textbook (page 202 in ebook)
Case Study; Saskmutual Insurance page 600-601 in textbook (page 640 in ebook)

Group Presentation on Readings
Group to overview Chapter 16

Questions for Class, applied to Foodservice
1. Why is a foodservice operation such a good example of JIT/Lean/TPS?
2. Discuss _**each of**_ _Ohno's seven wastes_ as they apply to any foodservice operation? State a good example of each?
3. How can the "_**5-s's**_" impact a foodservice operation – what have you seen?, any examples of the "other _**2 s's?**_"
4. How might variability (in what?) impacting a food service operation?, and what can be and is being done about it?
5. Do you see any _**bottlenecks**_ reducing throughput?, what are they and how can they be overcome?
6. What is the equivalent of _**Kanban**_ in a foodservice operation?
7. Where might you see _**work cells**_ in action?, or place where they could be applied?
8. Why are there often such negative associations with use of the term "Lean"

Group Case Study Questions (in course text):

1. Ethical Dilemma (page 636 in ebook)
What are the problems of this business?
Where is the ethical problem?
What would you do?

2. JIT at Arnold Palmer Hospital (page 202 in ebook) - NOTE; - Discussion Questions are Different from Those in Texts

How does this supply chain differ from that in a manufacturing firm?

What are the constraints on making decisions based on economics alone at Arnold Palmer Hospital?

What role do doctors and nurses play in supply chain decisions in a hospital? How is this participation handled at Arnold Palmer Hospital?

Dr. Smith just returned from the Annual Physicians' Orthopedic Conference, where she saw a new hip joint replacement demonstrated. She decides she wants to start using the replacement joint at Arnold Palmer Hospital. What process will Dr. Smith have to go through at the hospital to introduce this new product into the supply chain for future surgical use?

3. SaskMutual Insurance

Identify the attributes you would expect the Claims Processing Department at SMIC to have once the new Lean system is in place.

What will the restructured cell layout for claim processing in **Figure 16.10** ⬀ (https://etext-ise.pearson.com/eps/pearson-reader/api/item/b10ce5f5-91ec-417a-9ffa-074105e5bd14/1/file/Heizer_9780135234495_et2_dccsb_l1_redserif_default_08-06-2019/OPS/xhtml/fileP70010158070000000000000000B0F8.xhtml#P70010158070000000000000000B182)

look like? Draw it.

What assumptions are you making about personnel and equipment in the new group technology cell layout?

How will the new Lean-oriented system benefit the SMIC operation? Explain.

Please submit your group presentations on the Readings and/or the Case via CANVAS to the Instructor at the end of the Class for Grading and feedback..

Overview: 7 - The Midterm Exam and What to Expect   **Mar 9/23**

I aim for an average class mark of around 70-75 %

The exam will focus on what we did in class and my slide decks (which are now virtually the same content as the Group Reading Presentations)

I expect you to have read and understood the cases, though I will not be asking any very detailed questions on them

I do expect that you have understood our inclass discussions and group presentations on both readings and cases, especially the solutions we discussed in class

I do expect that you have read the text and generally understood the terms and concepts that we talk about on this course

There **_will_** be questions on calculating process parameters such as flow time, capacity, utilization and bottlenecks (as per Kristen's Cookies), and what happens if we change the process

There **_won't_** be questions on the math of forecasting, though I do expect you to understand the methodologies we talked about in class, such as what they are, what they do, and the circumstances under which you might use one method or the other

There **_will_** be questions on calculating EOQ, ROP, and safety stock.

Any other data used in questions such as Z values of a Standard Normal Distribution will be given

I do not expect you to memorise statistical tables, but I do expect you to understand what they are and how to use them

Overview 8 - Planning & Improving Projects

Key Learnings:

Projects need to be managed like a process

Importance of defining a project's deliverables

Critical Path Method for planning projects

Methods for controlling project performance

Importance of managing relationships between project stakeholders

Read:

Chapter 3 Project Management in the textbook. Please focus on the general concepts of project management and terms like Network Diagram, Critical Path, Slack time, Cost/Time Tradeoffs and Crashing rather than the specific math of pages 64-71

Instructor will add an additional group exercise/case study in the key elements of Project Management to be done remotely, using your current groups.

Class Questions
1. Where might Project Management skills be used within a Foodservice Outlet or Chain of outlets?

In-Class Activities:

Part 1 of this class begins with a lecture and discussion on project management.

Part 2 of this class will be a take home group exercise on applying basic project management techniques to manage and improve projects. The instructor will allow time at end of class for groups to start this assignment, and you may continue work on it remotely as well.

This assignment can be done remotely or if the group meets in person after class, or a bit of both as desired.

You should upload your assignment into CANVAS by Midnight of the day before CLASS 9.

Once Completed, you can start to think about the next simulation called Littlefield Technologies. Instructions to start are posted in this Module. Please read them and get set up as per the instructions prior to the next Class (CLASS 9)

Information Technology & Littlefield Simulation Practice Round

Mar 16/23

Overview 9- Part 1 - Managing Information Technology

This class has two parts PART 1 - is about Managing IT, PART 2 is setting up and getting ready for plqying the Operations Management Simulation called Littlefield Labs

Key Learnings:
The information technology components of "Big Data"
Big Data impacts on supply chain management and customer relationships
Critical issues in implementing large IT projects
Introduce the procedures for the Operations Management Simulation and the importance of cross functional coordination of information to support key organizational decisions

Read:
A Conversation about Information Technology. (Coursepack)
Group Case Study: Future Vision Digital Services (FVDS) – posted on the COURSE CANVAS

Questions for Class
1. In your experience, does this conversation ring true?
2. Why are many business managers frustrated with organizational IT?
3. Why are many IT managers frustrated with 'the business side'?
4. What can be done to improve relations between the two sides?
5. How is IT utilized in a Foodservice Outlet?, what opportunities can IT help realize?

Group case Study Questions (FVDS):

As Blake Randolph, what would you do to deal with the immediate problem?

Does the blame reside with Gregoire for being difficult to manage, or with Randolph, for not being able to manage Gregoire?

Would you use Gregoire on another project? Why or why not?

If you answered yes to Q3, would you change the way you manage Gregoire? How?

Overview 9 - Part 2 - Littlefield

<u>Littlefield Labs Simulation</u>

Please ensure you have read and completed all the activities outlined in "Littlefield Labs - Getting Ready for CLASS 9", as posted in CLASS 8, before Class 9, have registered as individuals and are already set up in groups, ready to go

Please come to class individually prepared in order to be effective team members.   You will also have more fun when you are prepared.

We are going to play a practice round in class in Class 9.The practice round is called "Capacity Management at LL". Details are in the file capXL1hour posted to this class in CANVAS.

The "real" graded round mentioned is called "Managing Lead Times at LL" is also posted in this module. Details are in the file leadtmXL3d posted to this class in CANVAS. Instructor will make this available immediately after class.

The live simulation will open on Noon the first Sunday after Class 9, and run until noon the following Wednesday (72 hours over 3 days).

Enjoy! It will be fun!

Read carefully the instructions posted above to set up you and your groups for the simulation and the capacity management scenario posted in CANVAS, which you will play in class with your team.

You will work as a team in your existing groups . Part of the in-class activities will be getting your team up and running and ready for when you play the "real" round on Sunday.

Overview 10 - Littlefield Debrief and Risk Management

By this class, groups will know their final ranking in the game. So in this class the instructor will overview the results, and debrief the class on the decisions made by the teams during the Littlefield labs game. We will discuss the approaches taken to produce the winning (and losing !) results, and the support for the operational decisions made.

Then the instructor will overview the feedback in the group dynamics reports, and draw out general conclusions as to the functioning of both individuals and teams when faced with challenges and the bottom line need to get results.

Instructor will also debrief class on the main points generated from the Risk Management Exercise

We will then discuss Risk Management, in this "New Normal" after the COVID era

Key Learnings:

Creating processes for assessing threats to an organization's stakeholders
Security is critical to information system effectiveness
Identifying weaknesses in system security and strategies for mitigating the risk of security breaches
Privacy as a right for information system stakeholders and the regulation of Privacy
Assuring customer and employee safety throughout a supply chain

Lecture and Discussion of Operating Risks and their Management

Risk comes in many forms, and can impact Employees, Customers, Suppliers, Investors and many other stakeholders in an organization. We will overview the many challenges of Managing Risk, and especially Operating Risk in the context of Global Operations

Risk Management

The class will then complete an take home group exercise based on the document posted on CANVAS. "Class 10 – Assignment for Operations Risk Class - W22". the instructor will allow time in class to start this exercise.....Groups can also meet virtually and discuss their response to the questions raised in the exercise, then upload their response into CANVAS to the instructor by midnight of the last day of the course.

Presentations on Foodservice Operations Project

Mar 30/23

Overview 11-Group Presentations on FoodService Project

This class will be presentations on the Group Foodservice Project, we will typically do about 6 groups in this class.

Key Learnings
Critical analysis of organizational processes
Identification of tradeoffs and synergies in the design of organizational processes
Identification of opportunities for process innovation
How to describe and communicate changes to important organizational processes
Debrief of key concepts from the course

Assigned work due

Group Presentations

Class 12 - Group Presentations on Foodservice Operations Project and Wrap Up

Apr 6/23

Overview Class 12 - Group Presentations on Foodservice Project and Wrap Up

Assigned Work Due

We will finish the Group Foodservice Project Presentations

The instructor will finish the course with a "Top Ten Takeways" summarizing the main points of this course.

PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

GENERAL SCHULICH ACADEMIC POLICIES

Grading

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1. Elective courses are expected to have a mean grade between 5.2 and 6.2.

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor.

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

Academic Honesty

Academic honesty is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may also be found on Schulich website: **http://schulich.yorku.ca/current-students/academic-honesty/** ⤷ **(http://schulich.yorku.ca/current-students/academic-honesty/)**

Accommodations

For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services. For counseling & disability services, contact Student Services or see **http://accessibility.students.yorku.ca/** ⤷ **(http://accessibility.students.yorku.ca/)** .

Exams (Absence from)

Midterm
Students who miss a mid-term examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence*. Instructors may request that students submit a copy of their documentation to Student & Enrolment Services. Accommodations and/or re-scheduling of the mid-term exam will be left to the discretion of the course instructor with the expectation that the case be resolved within 14 calendar days.

Final
Within 24 hours of missing a final examination students must contact their course instructor. Students must also submit a completed Deferred Standing Request Form within 48 hours online. Formal documentation* (e.g. Counselor's Statement, death certificate, etc.) regarding the reason for missing the exam must be submitted electronically via file upload as part of the form. The Deferred Standing Request form can be found at **https://schulich.yorku.ca/exam-deferral** ⤷ **(https://schulich.yorku.ca/exam-deferral)** . Student & Enrolment Services will notify the instructor and copy the student by email if appropriate documentation has been received.

For full details regarding exam deferrals, consult the Undergraduate Academic Handbook (pg.30) and/or the Graduate Policy Handbook (pg. 23).

* Currently, students are not required to submit a doctor's note or an Attending Physician's Statement in support of missed midterms, exams and/or requests for deferred standing for courses impacted by the COVID-19 situation. If you haven't already done so, we strongly encourage you to connect with your course instructor(s) first to make other arrangements to complete outstanding work, as a deferred standing may not be necessary.

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together** ⊟ **(https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

As pandemic-weariness increases, instructors and students are encouraged to uphold compassion, kindness, empathy, and a sense of responsibility towards one another amid such uncertainty and strain. Students are reminded of their duties and responsibilities to uphold professional and respectful interactions with their instructors and classmates, including, but not limited to: the University's zero tolerance for inappropriate conduct in virtual forums; the safeguarding of people's intellectual property; and our collective responsibility to protect academic honesty at all times but especially in those situations when we face difficulty and stress, or when there is opportunity or temptation to cheat. These points, and others, are addressed in the **University's Senate Policy on Academic Honesty** ⊟ **(https://www.yorku.ca/secretariat/policies/policies/academic-honesty-senate-policy-on/)** and **Code of Students Rights and Responsibilities** ⊟ **(https://oscr.students.yorku.ca/student-conduct)** .

Student Rights and Responsibilities

York University is a place of teaching, research, and learning where people value civility, diversity, equity, honesty and respect in their direct and indirect interactions with one another.

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities** ⊟ **(https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

Violations of community standards are taken seriously and investigated by the Office of Student Community Relations and other appropriate parties (**http://oscr.students.yorku.ca/** ⊟ **(http://oscr.students.yorku.ca/)**). For details on how to handle a breach of community standards, visit the Office of Student Community Relations website at: **https://oscr.students.yorku.ca/student-conduct** ⊟ **(https://oscr.students.yorku.ca/student-conduct)** . Every student agrees by the act of registration and enrolment to be bound by the regulations and policies of York University and of the Schulich School of Business.

Take time to fully review the Code of Student Rights and Responsibilities:
https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ ⊟ **(https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)**

*** Please note that academic policies specific to this course may be contained in other parts of this course outline.*

To: Faculty Council, Schulich School of Business
From: David A. Johnston, Director of the Master of Supply Chain Management (MSCM) Program
Date: April 1 2023
Re: Minor Course Change to OMIS 6400 Supply Chain Consulting Project

Motion: In conformance with "Update to ONCA Course Code Definition" November 16 2022, the course OMIS 6400 Supply Chain Consulting Project be designated "BLEN (blended) – combination of virtual, asynchronous with scheduled, in-person components".

Rationale:

The course was first implemented in Winter 2020 and ceased to be delivered in-person halfway through the term due to Covid-19. Subsequent experience with the course has indicated that it is best delivered with a combination of in-person classes, on-line asynchronous content, and on-line synchronous team meetings with the instructor. This best suit the team-based project nature of the course and its emphasis on field research with external organizations. Currently there is two in-person classes interspersed with multiple synchronous milestone meetings with the instructor on-line or as needed in-person to facilitate the project. The on-line asynchronous components are pre-recorded instructor delivered lectures to facilitate team management, client engagement and the delivery of the final project. Feedback from the students from students upon exit from the MSCM program has consistently indicated that this is a practical and effective way to deliver this kind of experiential course involving industry, teamwork and individualized learning.

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Master of Supply Chain Management

2. Responsible Unit:
   OMIS

3. Subject Code (Rubric) and Course Number:
OMIS 6400

4. Credit Value:
   4.5

5. Long Course Title:
OMIS 6400 Supply Chain Consulting Project

6. Short Course Title:
OMIS 6400 Supply Chain Consulting Project

7. Type of Course Change(s) (indicate all that apply):

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

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

9. Rationale:

Please indicate how the proposed change will contribute to the academic objectives of the course/program. Please provide a description of the amended learning outcomes/objectives for the course, if applicable. Additionally, please indicate if the course is presently inactive, active, or retired. Finally, please append the program's existing learning outcomes as a separate document.

In conformance with "Update to ONCA Course Code Definition" November 16, 2022, the course OMIS 6400 Supply Chain Consulting Project be designated "BLEN (blended) – combination of virtual, asynchronous with scheduled, in-person components".

The course was first implemented in Winter 2020 and ceased to be delivered in-person halfway through the term due to Covid-19. Subsequent experience with the course has indicated that it is best delivered with a combination of in-person classes, on-line asynchronous content, and on-line synchronous team meetings with the instructor. This best suit the team-based project nature of the course and its emphasis on field research with external organizations. Currently there is two in-person classes interspersed with multiple synchronous milestone meetings with the instructor on-line or as needed in-person to facilitate the project. The on-line asynchronous components are pre-recorded instructor delivered lectures to facilitate team management, client engagement and the delivery of the final project. Feedback from the students from students upon exit from the MSCM program has consistently indicated that this is a practical and effective way to deliver this kind of experiential course involving industry, teamwork, and individualized learning.

10. Proposed Course Information:

Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

11. Enrolment Notes:

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title: OMIS 6400 Supply Chain Consulting Project **The Supply Chain Consulting Project (SCCP) is a capstone project for the Master of Supply Chain (MSCM) program. Students will work with an organization on a SCM relate project. They will be mentored to use the knowledge from foundational course studied in previous terms of the MSCM program to provide insightful analysis and develop actionable recommendations for a client organization.**	**UNCHANGED**

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

12. Consultation:

For changes in integrations and cross-listings, as well as changes to courses that are integrated and/or cross-listed, please provide evidence that appropriate consultation has taken place.

Originator:

David Johnston	April 1 2023
Signature	Date

David Johnston	OMIS
Name	Area or Specialization

Approvals:

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

David Johnston	April 1, 2023
Signature	Date

	Master of Supply Change Management
David Johnston	
Name	Area or Specialization

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

David Johnston	April 1, 2023
Signature	Date

	Master of Supply Change Management
David Johnston	
Name of Program Director	Program

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

V. July 2021

Kevin Tasa   May 4, 2023
_____   _____
Signature   Date

Kevin Tasa   Masters Program Committee
_____   _____
Name of Committee Chair   Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Minerva Cernea, Associate Director, Head of the PD&EE Office
Date: April 17, 2023
Re: Changes to MGMT 6851, 3-credit MBA graduate placement course

Motion: To approve 3 changes to MGMT 6851:

1. Add as Prerequisite: "Students are required to complete all 5000-series Required Foundations of Management Core Courses before enrolling in this course"
2. Delete from the expanded course description: "requires an academic term after the course to allow adding the 3 credits."

   And add under Enrollment Notes: "Students may enroll in MGMT 6851 in either the term when the work placement occurs or in the term following the work placement. As part of the application to a work placement course, students must consult with Academic Advising and International Relations to determine which term to enroll in MGMT 6851."
3. Change the approval process from being done by the MBA Program Director to being done by the Course Instructor/Director/Head of the PD&EE Office

Rationale:

1. The MGMT 6851 course placement was created with the academic intent of allowing the students who completed their 1st year of the MBA to apply, during their work term, the knowledge acquired in their 1st year of the program. By clearly stating, as a prerequisite, that students have to complete all 5000-series core courses, this intent is better communicated to the students.
2. We want to offer our students the possibility to enroll in MGMT 6851 in either the term when the work placement occurs or in the term following the work placement. This will provide flexibility for both domestic and international students. In order to ensure that the legal and academic requiremnst are met, this process will include a mandatory consultation with Academic Advising and International Relations as part of the approval process.
3. Having one person, the Course Director/Head of the PD&EE Office, approve and evaluate the placements simplifies the approval process.

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:

Schulich Master of Business Administration (MBA)

2. Responsible Unit:

Professional Development and Experiential Education Office

3. Subject Code (Rubric) and Course Number:

MGMT 6851

4. Credit Value:

3.00

5. Long Course Title:

MBA Graduate Placement – Work Focused Experiential Education

6. Short Course Title:

MBA Graduate Placement

7. Type of Course Change(s) (indicate all that apply):

	in course number
	in credit value **(provide course outline)**
	in course title **(provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)**
	in course description **(provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)**
	in learning objectives/outcomes **(please append the program's existing learning outcomes as a separate document)**

	in integration **(please provide statement of approval from relevant undergraduate coordinator or Chair)**
	in cross-listing **(please provide statement of approval from other program)**
X	in pre/co-requisite
	retire course
X X X	other **(please specify)** – Faculty Resources, Enrolment Notes and Expanded Course Description **change**

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

Fall 2023

9. Rationale:

Prerequisites: Students are required to complete all 5000 series Required Foundations of Management Core courses before enrolling in this course.

RATIONALE: The MGMT 6851 course placement was created with the academic intent of allowing the students who completed their 1st year of the MBA to apply, during their work term, the knowledge acquired in their 1st year of the program. By clearly stating, as a prerequisite, that students must complete all 5000-series core courses, this intent is better communicated to the students.

Remove from Expanded Course Description the information about where the credits will be placed and include this information in the Enrollment Notes.

RATIONALE: In this way the information is visible to the students.

Remove the MBA Program Director from approvals.

RATIONALE: This simplifies the approval process.

10. Proposed Course Information:

V. July 2021

11. Enrolment Notes:

Students may enroll in MGMT 6851 in either the term when the work placement occurs or in the term following the work placement. As part of the application to a work placement course, students must consult with Academic Advising and International Relations to determine which term to enroll in MGMT 6851.

Existing Course Information (Change From):	Proposed Course Information (Change To):
Pre/co-requisite	**Pre/co-requisite** Students are required to complete all 5000-series Required Foundations of Management Core Courses before enrolling in this course.
Expanded Course Description This elective can be taken after the 1st year of the MBA program ~~and requires an academic term after the course to allow adding the 3 credits.~~	**Expanded Course Description** This elective can be taken after the 1st year of the MBA program.
Enrolment Notes	**Enrolment Notes** This elective can be taken after the pre-requisite MBA courses have been completed. Students may enroll in MGMT 6851 in either the term when the work placement occurs or in the term following the work placement. As part of the application to a work placement course, students must consult with Academic Advising and International Relations to determine which term to enroll in MGMT 6851.
Faculty Resources All tenure stream faculty members are qualified to supervise placements. ~~Placements that are part of a program would typically be supervised by the program director.~~	**Faculty Resources** The placements will be approved and supervised by the Head of the Professional Development & Experiential Education Office. All tenure stream faculty members are qualified to supervise placements.

V. July 2021

12. Consultation:

Student Services, ADA office

Originator:

(signature)	April 15, 2023
Signature	Date

Minerva Cernea	PD&EE Office
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

Name	Area or Specialization

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

Alexandra Campbell	April 17, 2023
Signature	Date

Alexandra Campbell	Master of Business Administration
Name of Program Director	Program

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

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Kevin Tasa   May 4, 2023
_____ _____
Signature   Date

Kevin Tasa   Master Program Committee
_____ _____
Name of Committee Chair   Committee

MGMT 6851 3.00: Graduate Placement

Course Outline
Starting with Fall 2023, will be offered every term

Class day and time: TBD
Location: TBD

Instructor	**Assistant**
Dr. Minerva Cernea	Nisha Jani
(416) 736-2100 extension 77913	(416) 736-2100 extension 55942
Seymour Schulich Building – N203C	Seymour Schulich Building
mcernea@schulich.yorku.ca	njani@schulich.yorku.ca

Office hours: By Appointment

Dr. Minerva Cernea is the Associate Director and the Head of the Professional Development & Experiential Education (PD&EE) Office and she has over eight years of experience in teaching and coaching IMBA and MBA students at the Schulich School of Business. Dr. Cernea has extensive leadership experience locally and internationally, directly managing organizations as well as selecting leaders/managers for different companies around the world. Conducting executive search assignments for over 18 years, Dr. Cernea completed more than 450 senior-level assignments across the Industrial, Technology, Financial, and Consumer Goods sectors, in 18 countries, from North America, Europe, Asia, Africa, and the Middle East. Prior to Executive Search Dr. Cernea worked as Marketing Manager Romania for Apple Computer and prior to that she worked in research engineering. Dr. Cernea has a Master of Science degree in Electronics and Telecommunications Engineering, an International Executive MBA with General Management specialization, and a PhD degree in International Psychology / Organizations and Systems with focus on cross-cultural leadership effectiveness. She is fluent in English, French, and Romanian.

Brief Description
The purpose of this Graduate Placement is for students to gain relevant business work experience and reflect on the learnings facilitated by this experience, and thus increase the students' employability. A minimum of 12 weeks full-time work is required to complete this Graduate Placement.

This Graduate Placement is important for the understanding of business norms and practices. Through their Graduate Placement experience, students build upon and practice key learnings from their first year MBA courses, reflect on them, and build an experience relevant for the job after graduation.

Prerequisites/Corequisites/Course Exclusions: Students are required to complete all 5000-series Required Foundations of Management Core Courses before enrolling in this course.

It is highly recommended that students with limited work experience complete in their first year of the MBA the 3-credit course: Professional Development for Managers, MGMT 6350.

Contents

Course Learning Outcomes

1. Develop self-management skills towards building a successful placement experience and valuable career skills.
2. Effectively apply the 1st year MBA knowledge to maximize the work performance
3. Develop the skills and attitudes required for future job search activities.
4. Reflect on how Equity, Diversity and Inclusion is applied in the workplace.

Deliverables at a Glance

Assignment/Task	Quantity	% Weight	Total %	Author
Report Part A: Time and Activity Logs	1/week	20%	20%	Individual
Report Part B: Placement Site Analysis	1	30%	50%	Individual
Report Part C: Reflection Paper	1	50%	<u>100%</u>	Individual
Supervisor Evaluation	1	Required	Required	Individual
			100%	

For details, see "Written Assignments/Projects: Descriptions" (p. 11) and "Evaluation …" (p. 12).

Course Material

This course will not have in-class handouts, all materials and recommended readings will be posted on *Canvas.*

Canvas: Canvas is the digital course portal and functions as a digital course outline. You will find the weekly readings/viewings, detailed descriptions and due dates for all assignments, a course calendar, course updates, various course materials and resources, news items, and resources.

Every week, you should check the Session-by-Session Syllabus below for readings.

All articles are easily accessible using York University Library Electronic Resources. Articles from the Harvard Business Review can be accessed through the library. Please see http://researchguides.library.yorku.ca/HBR for instructions.

Student Preparation for Class and Class Participation: Expectations

The Placement Position
The position must be professional in nature, allowing you to apply the concepts and theories learnt in your first year of your MBA program. Your Placement must:
- Directly benefit the host company and yourself
- Challenge you and utilize your management training

<u>Organization of the Course</u>

The following criteria must be considered when students negotiate their Placement with potential organizations:
Duration   Minimum 12 weeks of full-time work maximum the duration of an academic term
Timing   It can be taken after first year of the MBA program

All students must be authorized to work full time during the placement term. International students should consult with International Relations to confirm their eligibility to work full time. The 3-credits will be added in your academic term following your placement term.

Students may enroll in MGMT 6851 in either the term when the work placement occurs or in the term following the work placement. As part of the application to a work placement course, students must consult with Academic Advising and International Relations to determine which term to enroll in MGMT 6851.

Approval of the Work Term
The Schulich Head of the Professional Development & Experiential Education (PD&EE) Office will approve the Placement, ensuring that meets the following criteria:
- A project that will benefit the employer and provide relevant work experience to the student
- An opportunity for the student to apply management skills and techniques while performing meaningful work and reflect upon management concepts studied in the first year of the MBA

To be approved you must submit to the Head of the PD&EE Office **a Placement Approval Form**. The template for the Placement Approval Form will be uploaded on Canvas.

You MUST receive approval, by email, from the Head of the PD&EE Office, prior to accepting the offer, and once your placement is approved you must register in the course MGMT 6851.

In cases where the Head of the PD&EE Office does not approve a work term, the student may appeal this decision. The student should submit a 1-page narrative outlining a compelling case for why the work term should have been approved, plus relevant supporting documents to the ADA office: ada@schulich.yorku.ca. This appeal must be submitted to the ADA office within 14 days of the Head of the PD&EE Office 's decision.

Towards the end of the Placement, an email from the Head of the PD&EE Office is sent to the Placement site supervisor requesting the evaluation of the student's performance. This evaluation is a mandatory to Pass this course.

Here is some advice to help you make the most of your Work Term:

- **Be prepared to start**. Make sure you arrive on time your first day, are suitably dressed, and have agreed upon the tasks and accompanying deadlines for your Placement.
- **Do not be afraid to talk to your co-workers**. People are sometimes too busy to roll out the red carpet for an intern so you have to make the first move to talk with them.
- **Take it seriously and complete all tasks to the best of your ability**. Your Placement is a full-time job and you need to act accordingly; this is a great time to learn new tasks and demonstrate your work ethic. To land more challenging tasks, be proactive and write a proposal to your boss suggesting and outlining additional projects you could work on. This is less vague than simply asking, "Is there anything else I can do?" and thus has a better chance of achieving results.
- **Be willing to learn something new every day.**
- **Build a portfolio and keep a journal of your work**. Do not let the work you did be forgotten by keeping records of relevant projects you worked on during your Placement. This will also help you to write your final papers at the end of your Placement. You may have to ask for permission to have a copy of your work for your portfolio if it is proprietary work. A portfolio is very useful in your full-time job search, especially for jobs that require previous experience.
- **Ask the right questions.** Keep track of the information that has already been given to you to make sure you are asking the right questions. There will be a lot of new information coming at you and you might find it helpful to write down the information given to you during your first days and/or orientation. If the company gives you a handout about company policies or procedures, be sure to read it and familiarize yourself with it.
- **Ask to attend meetings and events**. This will help you learn how things really get done and by whom.
- **Try to fit in with the corporate culture**. This requires watching how people are interacting around you: how people dress, how they communicate, what hours they work, whether they lunch together or not, whether initiative or hierarchy is valued, etc.
- **Ask for feedback about your performance (though only if the culture is one that provides feedback**). It is better to learn earlier than later where your strengths and weaknesses lie.
- **Find a mentor** or someone you can learn from during your time there. Try to learn from the people who are the superstar performers and/or the most respected individuals in the office.
- **Learn all you can about the industry.**
- **Be positive about all your projects**. As an intern, you may be asked to do some unglamorous projects. It is better to do these with a positive attitude and ask for more responsibilities in addition to them rather than complaining about what you consider to be beneath you.
- **Develop a network of contacts**. Build strong relationships by listening to and learning from everyone you meet. Not everyone has the power to hire you, but each person you meet <u>is</u> a potential contact and resource on the road to a new job.
- **Talk to your coworkers about your future plans**. If you are working for a large company, talk to HR throughout your Placement and at the end of it, make sure to let them know what your future plans are.
- **Find out where and how positions are posted internally** if you would like to work for the company in the future.

It is important to reflect on your Placement experience once it ends, to draw conclusions about what you have learned, and to examine your career options while the experience is fresh in your mind. Consider doing the following:

Obtain References

Ask for a reference from your supervisor(s) for your personal use. You can make the process easier for the writer by giving him/her a list of points that might be included in the letter, such as your basic job duties, what you learned, and how you excelled. **Note**: Letters of reference are not used as frequently anymore as they can quickly become dated. Instead, ask if your supervisor would be willing to provide a verbal reference when/if needed at some time in the future. Also, ask if he/she would be willing to provide a recommendation via LinkedIn.

(The reference letter is quite separate from the Intern Performance Evaluation that the MBA Office will request from your employer. The latter is for internal use only).

Send Thank You letters

Be sure to send thank you letters as soon as possible to your immediate supervisor and/or anyone else who might have contributed to your experience and learning. Thank them for helping to make your Placement experience a valuable one and tell them what you learned, or let them know how the experience has helped you in your career development.

You might also write to any key, top-level people in the organization with whom you may have interacted briefly, even if you did not work closely with them. They could be valuable contacts in the future.

Think about what you learned about your career options and preferences:
* Would you like to do the type of job you did during your Placement?
* Would you like to work in that industry upon graduation?
* Would you like to do the job you observed your supervisor or someone else doing?

Think about what you learned about yourself during this placement:
* Did you learn anything about your professional skills and abilities? What do you do well? What areas do you still need to improve in?
* Did you learn anything about what does or does not interest you?
* What did you learn about your personality as you dealt with co-workers, supervisors, clients and/or customers?

Update your resume in preparation for your full-time job search:
* Write down everything you did during your Placement, all your duties and responsibilities/achievements, and choose the most relevant responsibilities/achievements to include in your resume. Be sure to use the **active verb +what you did +result** (quantitative or qualitative) approach when describing your accomplishments.
* Make note of job functions or areas of expertise you experienced, even if you did not do those things yourself

Look for ways to continue gaining experience in your area of interest:
* Set up networking meetings with alumni in the field
* Join relevant professional associations as a student
* Keep in touch with the people whom you worked with at the Placement site; and
* Start searching and/or applying for your full-time job in that field!!

Written Assignments/Projects and Exam[s]: Descriptions

Students' **grade** for this course is based on four components:
(1) Report Part A: Time and Activity log, completed throughout the placement
(2) Report Part B: Work Placement Site Analysis
(3) Report part C: Final Reflective Paper

(4) Supervisor's Evaluation. The work placement form must be filled out by the site supervisor and sent to the Course Coordinator/MBA Program Director.

Your deliverables (Report Part A, B and C as well as the Supervisor's Evaluation) must be received within two weeks of the completion date of placement, otherwise you will receive a grade F. All materials, including the Supervisors Evaluation must be received BEFORE the next academic term starts**.**

Evaluation of Assignments/Projects and Exams

<Include details as appropriate, including quality criteria, the weights (importance) assigned to different sections of an assignment if they are not equal, and treatment of late submissions (e.g., not accepted, a specified penalty for each day late, or …).>

You will submit a Report including Part A, Part B and Part C. They will be written in size 12, Times Roman font, double-spaced, with one-inch margins.

Report Part A: Time and Activity Log
The Time and Activity log allows you to keep track of all the job tasks, duties and assignments you perform during your Placement. For each week, you must record in sufficient detail your primary activities in an activity log. Describe in each entry what you did and learned about the organization, the work environment, your colleagues, customers, etc. during that week. Be specific. You should attempt to link some of these activities to concepts learned in your coursework. Each log/week has a 200-word limit.

Report part B: Work Placement Site Analysis
This will include the internal and external analysis of the organization, for example (but is not limited to):
  (i) A description of the organization, its history, its core activities and how they may have changed over time, and an organizational chart,
  (ii) A brief overview of the industry and its players (competitors, suppliers, customers, etc.),
  (iii) A SWOT analysis.
  (iv) A description of other relevant information and insights you gained about your site, like the work culture and management styles.

The word limit for this Part B (Work Placement Site Analysis) is 1500 words.

Report Part C: Reflection Paper
It is an exercise that allows you to think about what you experienced and observed during your work placement and by doing so generate unique and lasting insights that make a positive difference in your personal and professional life. Through this reflective activity, you are encouraged to analyze your actions and the material you are learning. You are encouraged to reflect thoughtfully upon and respond to the specific work environment, professional responsibilities, and your own role at your Placement location. Consider the best and worst parts of the Placement, why you liked/not liked certain activities and duties, and what you learned from the activities. Use Ryan's 5Rs Model of reflection – information about this model will be uploaded on Canvas.

The Reflection Paper should be based on the entire Placement experience and should incorporate the following points of discussion:

  (a) The method by which you secured the Placement opportunity. What worked well, and what would you do differently next time?

(b) The expected learning outcomes you had of the Placement when you chose it and whether those expectations have been met or changed because of the actual experience.

(c) The most important business skills you developed and the most critical knowledge you gained during your Placement.

(d) What business theories from your 1st year of the MBA program were you able to apply in your placement?

(d) Your own objective assessment of your work, performance, and contributions at the site. In what areas did you excel? In what areas did you struggle? Did anything you learned about yourself surprise you?

(e) A conflict or disappointment you experienced through your Placement and how you managed it?

(f) The Thesis Statement which identifies whether your expectations were met and what you learned. The body of your paper identifies two or three (depending on the length of your paper) major points that support your thesis statement.

(g) How are your future actions informed based on the experience you had in this Placement.

(h) Address aspects of equity, diversity, and inclusion as they relate to your placement.

<u>The word limit for this Part C (reflective paper) is 2000.</u>

The Supervisor's Evaluation is mandatory to receive a Pass for this course. You will have to make sure the Supervisor send the Evaluation in time to the Head of the PD&EE Office .

Calculation of Course Grade

You will be assigned a Pass or Fail grade in this course. In this manner, a letter grade for each of the three components mentioned above will be assigned. Your course grade, as suggested on page 2, will then be calculated by weighted averaging of these components' grades. The resulting numeric grade will be converted to a Pass/ or Fail grade according to the following scale:

9	A+	90 - 100	Exceptional
8	A	85 - 89	Excellent
7	A-	80 - 84	Very Good
6	B+	75 - 79	Good
5	B	70 - 74	Competent
4	B-	65 - 69	Fairly Comp.
3	C+	60 - 64	Passing
2	C	55 - 59	Barely Pass.
1	C-	50 - 54	Failing

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

For more details on the index, grading policy, and grade point average (GPA) requirements, see the Graduate Policy Handbook

https://schulich.yorku.ca/current-students/graduate-students/

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http://schulich.yorku.ca/current-students/academic-honesty/

Accommodations. For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services. For counseling & disability services, contact Student Services or see http://cds.info.yorku.ca/.

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Joseph Mapa, Program Director, Health Industry Management Program
Date: April 6, 2023
Re: New Course Proposal – HIMP 6140: Leading Health Sector Transformation

Motion:
Request to propose a new interactive seminar course in HIMP Specialization program for 2023/2024.

Rationale:
Continuous change is the norm for health sector managers and leaders. A recent study by Professor Sriharan's team on competencies required to lead future healthcare showed that health sector leaders need the adaptive capacity to navigate complex dynamic challenges facing healthcare. This proposed course combines adaptive leadership theory and practices to prepare students to view leadership as a dynamic process instead of leadership as a role or person. *This is a new required course for the HIMP Program and complements the newly revamped program curriculum, which has enhanced the experiential learning and provides comprehensive perspectives of the health industry.*

New Course Proposal Form
Schulich School of Business

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

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

1. Responsible Program:
Schulich MBA -HIMP

2. Responsible Unit:
HIMP

3. Subject Code (Rubric) and Course Number:
HIMP 6140

4. Credit Value:
3.00

5. Long Course Title: Leading Health Sector Transformation

6. Short Course Title: Leading in Health Sector

7. Effective Term/Calendar Year: Fall 2023

8. Language of Instruction: English

9. Calendar (Short) Course Description:
To lead innovation and transformation in the health sector, leaders must work across organizational and systems silos to develop shared priorities and cohesive systems approaches. The course will integrate concepts from complexity science, systems theory, adaptive leadership, and behavioural economics to challenge one to explore leadership while gaining tools for leading systems challenges in the health sector market.

10. Expanded Course Description:
Canada's health sector is considered one of the world's largest and most diverse health-care

1

markets. Canada's health sector market accounted for 12.2% of Canada's gross domestic product (GDP) in 2022 and over 12.5% of total employment in Canada.

The health sector market is complex and encompasses hospitals, pharmaceuticals, professional associations, non-governmental and governmental agencies, and consumer organizations. To lead innovation and complex transformation in the health sector, leaders need to work across organizational and systems silos to develop shared priorities and cohesive systems approaches. To achieve that goal, leaders must understand how people, processes, policies, resources and institutions who make up systems operate independently and how they depend on one another. The course will build on emerging research on the systems leadership required to transform the health sector into the future. The course will also integrate concepts derived from seminal and contemporary approaches from complexity science, systems theory, adaptive leadership, and behavioural economics to challenge one to explore leadership practice while gaining tools for managing and leading systems challenges that require collective action.

This interactive applied learning course is offered over 12 sessions. Weeks 1–4 will explore the building blocks of health systems, different stakeholder agendas, as well as the complex hierarchies, professions, and cultures within a system. During weeks 5–8, we will analyze how leaders utilize adaptive communication, shared visioning, sensemaking through uncertainty and inclusive decisions to influence systems transformation. During weeks 9–12, we will explore the critical role of individual-level and collective-level motivation, trust and emotions in facilitating collaboration and engagement for systems transformation.

11. Course Learning Outcomes:

On completion of this course, students should possess the following competencies:

a. **Depth and breadth of knowledge**
   o Explore various tools and frameworks to unpack systems challenges.
   o Learn leadership behaviours required to lead systems transformation.
b. **Knowledge and methodologies**
   o Understand the nature and challenges of complexity and uncertainty in the health sector.
   o Communicate clearly and persuasively with diverse stakeholders to build collective understanding and support for health systems transformation.
   o Foster a culture of collaboration, creativity, and feedback for leading adaptive systems transformation.
   o Reflect on and challenge your own leadership ideologies, approaches and behaviors to identify areas for improvement.
c. **Application of skills**
   o Recognize and respond to complex problems and opportunities with adaptive systems leadership.
   o Apply evidence-based learning and tools to lead complex adaptive transformation in the health sector.

12. Rationale:

Continuous change is the norm for health sector managers and leaders. A recent

study by Professor Sriharan's team on competencies required to lead future healthcare showed that health sector leaders need the adaptive capacity to navigate complex dynamic challenges facing healthcare. This proposed course combines theory and practices to prepare students to view leadership as a dynamic process instead of leadership as a role or person. *This is a new required course for the HIMP Program and complements the newly revamped program curriculum, which has enhanced the experiential learning and provides comprehensive perspectives of the health industry.*

13. Evaluation:

	Relevant Learning Objective	*GRADE*	*Due Date*	*AUTHOR*
In-class Participation	A.1,A.2, B.1,B.2	10%	Weekly	Individual
In-class Mini Assignments	C.1, C.2	10%	Week 2,4,11	Individual
Learning Journal	A.1,A.2,B.1	20%	Week 3,6,9, 12	Individual
Case Analysis	B.2,B.3,B.4,C.1,C.2	20%	Week 7	Group (20%)
Leadership Debate Assignment	B.3,B.4,C.1,C.2	20% +20%	Week 10	Group (20%) + Individual (20%)

14. Integrated Courses:
NA

15. Cross-listed Courses:
NA

16. Enrolment Notes:
Adaptive leadership is a unique concept in the leadership literature and can certainly be applied to other sectors, especially sectors that necessarily have to be collaborative.

17. Faculty Resources:
This course will be taught by Professor Abi Sriharan. She is a new faculty member with the Krembil Centre for Health Management and Leadership. Professor Sriharan is an internationally recognized authority on complex health systems leadership.

18. Physical Resources:
Classroom space suitable for case-based teaching.

19. Bibliography and Library Statement:

There is no required course textbooks. Course Syllabus includes the key readings and case studies from the Harvard Business Publishing. These will be made available to purchase as a course pack from Harvard Business Publishing site.

New Course Proposal Template
(Part B - Schulich Use Only)

20. Instructors and Faculty Coordinator

Initial instructor:
Professor Abi Sriharan

Alternative instructors:
NA. This is an original course based on original research as described above.

21. Specializations

Primary area or specialization:
Health Industry Management

Secondary areas or specializations:
TBC

22. Student Contact and Enrolment

Contact hours:
This course will be offered over twelve sessions.

Maximum enrolment:
25

Expected enrolment:
18

Evidence for enrolment expectations:
This is based on previous HIMP course enrollment trends as well as other MBA programs that offers health specialization.

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

This is an important part of the healthcare agenda. We will make every effort to integrate issues pertaining to social justice in this course. Professor Mapa has instructed all of the HIMP course instructors to consider and incorporate equity, diversity, and inclusion including decolonization and Indigenization perspectives in all the course content. We will use representative cases to ensure we gain diverse perspectives. We will ensure classroom environment is inclusive and diverse perspectives are valued and respected.

24. Human Participants Research

N/A

25. Conditions for Approval

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

a) **The Area is deleting courses with at least the same total number of credits.**
   This course is replacing HIMP 6110 The Business of Healthcare (3.00 credit), whose content overlaps with other HIMP core courses. The significance of this course in preparing MBA students for healthcare careers aligns with the modernized program curriculum focused on experiential learning and future state considerations. The research shows that adaptive competencies are essential for future managers and leaders in healthcare. We are fortunate to have been able to recruit the leading subject matter expert and have her share these insights and perspectives with our students. This is one of the reasons that we recruited Professor Sriharan.

b) **Provide a convincing case for the proposed course.**
   State the reason the program needs this new course and provide evidence that the Area has no elective with student enrolments low enough to warrant deletion. Approval from the ADA will be required. <u>NA</u>

Originator:

Joe Mapa	April 6, 2023
Signature	Date
Joseph Mapa	Health Industry Management
Name	Area or Specialization

Supporting Faculty Members

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

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

This is a course specifically designed for HIMP, to bring the current HIMP curriculum to meet the needs of the new generation of healthcare leaders. This course is based on original research on healthcare leadership and coauthored by the instructor. Therefore, it is specific to the adaptive leadership in the healthcare context. The course syllabus, readings and case studies are carefully sourced based on the emerging research in this field. Therefore, this is not redundant nor does it duplicate existing leadership courses in other specializations, because of it's unique, tailored and original sourcing. We would welcome collaboration and engagement from area or specializations that you would like to share this syllabus with. We are not familiar with the other individuals who have sub specialized the leadership topic in the context of adaptive leadership as conceptualized by Ron Heifetz specifically and reaffirmed by the first Canadian study on healthcare leadership in the post-pandemic world.

Ashwin Joshi — *Marketing & Associate Dean Programs*

Amin Mawani — *Accounting & Director of MHIA*

Luke Zhu — *Organization Studies & Director of MMgt*

Theo Peridis — *SGMT*

Eileen Fischer — *Marketing & Associate Dean, Research*

David Johnston — *OMIS & MSCM*

Ruodan Shao   *Organizational Studies*

Ingo Holzinger   *Coordinator, Skills for Leadership*

Kevin Tasa   *Organizational Studies*

Approvals

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

Joe Mapa

_____   April 6, 2023_____
Signature   Date

Joseph Mapa   HIMP

_____   _____
Name of Coordinator or Director   Area or Specialization

Degree Program:
I support the addition of the course to the SSB curriculum.

   Alexandra Campbell   April 26, 2023
Signature   Date

   Alexandra Campbell   Director, MBA Program
Name of Program Director   Program

Program Committee:

V. July 2021

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

Kevin Tasa

May 4, 2023

Signature

Date

Kevin Tasa

Master Program Committee

Name of Committee Chair

Committee

HIMP 6140 3.0 Leading Health Sector Transformation

COURSE OUTLINE
Fall 2023
Tuesdays 2.30-5.30 pm beginning September 12th, 2023.
Room TBA

Instructor
Professor Abi Sriharan

E-mail: abisri@yorku.ca
Office Hours: By appointment

Admin Support
Clara Kan
Room N305A
ckan@schulich.yorku.ca
416 736-2100
x77960

Contents

About the Instructor

Dr. Abi Sriharan is an adjunct professor at the Schulich School of Business. She is the senior scientist and research director at the Krembil Centre for Health Management and Leadership at the Schulich School of Business at York University, Canada. Dr. Sriharan is an internationally recognized authority on systems leadership and innovation. Her current research focuses on three streams of work: the impact of digital innovations on the workforce, the future of work in the health sector, and the presence of women in the workforce. Popular media outlets, including The Globe and Mail, the Toronto Star, CTV News, and Global TV, have covered her work. Before her academic career, Dr. Sriharan spent ten years as senior health-care executive and consultant for organizations in Canada and the United States, advising the management teams of multinational health-sector organizations in over fifteen countries on health systems innovation and

transformation. Dr. Sriharan received her DPhil and MSc from the University of Oxford and her bachelor's degree from the University of Toronto. She received additional leadership training from Harvard University and the Weatherhead School of Management at Case Western Reserve University.

Brief Description

Canada's health sector is considered one of the world's largest and most diverse health-care markets. Canada's health sector market accounted for 12.2% of Canada's gross domestic product (GDP) in 2022 and over 12.5% of total employment in Canada.

The health sector market is complex and encompasses hospitals, pharmaceuticals, professional associations, non-governmental and governmental agencies, and consumer organizations. To lead innovation and complex transformation in the health sector, leaders need to work across organizational and systems silos to develop shared priorities and cohesive systems approaches. To achieve that goal, leaders must understand how people, processes, policies, resources and institutions who make up systems operate independently and how they depend on one another. The course will build on emerging research on the systems leadership required to transform the health sector into the future. The course will also integrate concepts derived from seminal and contemporary approaches from complexity science, systems theory, adaptive leadership and behavioural economics to challenge one to explore leadership practice while gaining tools for managing and leading systems challenges that require collective action.

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Instructional Method

Lectures will highlight key points from the readings and set the stage for case discussions. Case studies will provide applied opportunities to unpack leadership approaches. Guest speakers with influential health-sector roles will engage in fireside chats with students to share their lived experiences.

This class is interactive and enhanced by student participation. Those who take the opportunity to put their thoughts into words learn far more than those who simply listen passively.

Equity Diversity and Inclusion

We will integrate leadership experiences from diverse perspectives, experiences, and identities to create an inclusive learning environment and encourage critical thinking and social responsibility.

Prerequisites/Corequisites/Course Exclusions: None

Course Learning Outcomes

On completion of this course, students should possess the following competencies:

A. Depth and breadth of knowledge
1. Explore various tools and frameworks to unpack systems challenges.
2. Learn leadership behaviours required to lead systems transformation.

B. Knowledge and methodologies
1. Understand the nature and challenges of complexity and uncertainty in the health sector.
2. Communicate clearly and persuasively with diverse stakeholders to build collective understanding and support for health systems transformation.
3. Foster a culture of collaboration, creativity, and feedback for leading adaptive systems transformation.
4. Reflect on and challenge your own leadership ideologies, approaches and behaviors to identify areas for improvement.

C. Application of skills
1. Recognize and respond to complex problems and opportunities with adaptive systems leadership.
2. Apply evidence-based learning and tools to lead complex adaptive transformation in the health sector.

Course Material

We will not be using a textbook for this course but instead will use a course pack that can be purchased online. Additional readings will be posted in course learning management system.

Deliverables at a Glance

	Relevant Learning Objective	*GRADE*	*Due Date*	*AUTHOR*
In-class Participation	A.1,A.2, B.1,B.2	10%	Weekly	Individual
In-class Mini Assignments	C.1, C.2	10%	Week 2,4,11	Individual
Learning Journal	A.1,A.2,B.1	20%	Week 3,6,9, 12	Individual
Case Analysis	B.2,B.3,B.4,C.1,C.2	20%	Week 7	Group (20%)
Leadership Debate Assignment	B.3,B.4,C.1,C.2	20% +20%	Week 10	Group (20%) + Individual (20%)

Expectations for Student Preparation and Class Participation

Class Attendance

Students are expected to attend all classes. *If absent, students are still responsible for all contents, assignments and information covered in class*.

Class Preparation

Students are encouraged to prepare well for every class and during class to make significant contributions to discussions. Preparation includes (1) reading the course materials; (2) developing conceptual and practical questions; (3) being an active participant in class discussions, including conversations that explore cross-domain issues; and (4) providing constructive and thoughtful feedback to class members during presentations.

Contacting the Instructor

The best way to reach the instructor is via *e-mail*. Please include the course name to the subject line of any emails.

Description of Evaluation

Student evaluation will be conducted through the following four elements:

Assignment 1 Class Participation – (10%)

Grades for participation will be assessed using the following criteria:
- Attendance and Preparation
- Level of Engagement
- Contributions to Class Community

Grades for in-class activities will be evaluated based on the following criteria:
- Excellent (A/A+)—This student contributes to class, and group discussions reflect thorough preparation and excellent critical thinking. Ideas offered are substantive and original, providing excellent insights and direction for the discussion and integrating course concepts. Arguments, when presented, are very well-substantiated and persuasive.
- Good (A-/B+)—This student's class participation and group discussions reflect good preparation. Ideas offered are substantive, providing good insights and direction for the discussion, and significantly build on previous comments. Arguments, when presented, are well-substantiated and persuasive.
- Adequate (B/B-)—This student's contributions in class and group discussions reflect satisfactory preparation. Ideas offered are sometimes substantive, provide generally useful insights, offer a vague new direction for the discussion, or are minimally incremental to previous comments. Arguments are sometimes presented and are well-substantiated and sometimes persuasive.
- Unsatisfactory (C)—This student seldom participates in class and group discussions, or their contributions reflect inadequate preparation. Ideas offered are seldom substantive, provide limited insight, repeat comments already made, or lack feasibility or detail. Integrative comments and effective arguments are absent.
-

Assignment #2 In-Class Mini Assignments (10%)- Week 4, 7, 10

In-class application exercises will assess your comprehension of course materials and critical theories.

Assignment #3 – Learning Journal (20%) – Week 3,6,9,12

A reflective writing exercise is a valuable tool for leadership development. It allows leaders to review their actions, thoughts, feelings, and experiences and to clarify their goals, values, vision and strategy. It can strengthen self-awareness, critical thinking, and social awareness skills.
We will utilize reflective writing exercise to help you build your leadership toolkits.

Critical details of your assignment

- You will be allocated a specific time block during your class to write your reflections.
- Your reflection should summarize your main insights and takeaways from the course readings, class presentations, cases, and leadership stories to write about what you learned, felt, and would like to explore more.
- You can choose a format that works for you, such as a journal, a blog, or a template.
- Your weekly reflection should be 500 words or less.
- Your reflection exercise needs to be uploaded to your learning portal by no later than the weekly deadline.
- Each reflection entry is worth 300 points for a total of 1200 points.
- Classroom activities and background readings are complementary and essential to your leadership skills development. If you miss the week's lecture and only write reflections based on the background materials, you will receive partial points for that submission.

Points to Letter Grade Conversion for the Learning Journal

- 1101-1200 points = A+
- 1001-1100 points = A
- 901-1000 points = A-
- 801-900 points= B+
- 701-800 points= B
- 601-700 points = B-
- 501-600 points = C+
- 401-500 points = C
- 301-400 points= C-
- 300 points or less = F

Assignment #4 – Case Analysis (Group (20%)) – Due Week 7

You will work with a partner to analyze "A President Looks Back on His Toughest Fight" and understand the Obama administration's experience with reforming American health care. After analyzing President Obama's reflections about his leadership journey with transforming American health care, in collaboration with your partner, you will use one of the following tools to analyze the case:

- Decisions—Decision tree

- Human Factors – Behavioural Insights

- Stakeholders—Stakeholder mapping

- Complexity—Systems mapping

Class Group Presentation: You will present your analysis in class on the final day of the course. Each pair will have 10 minutes to present.

Your group case analysis presentation will be graded on three criteria:

- Critical Thinking: Main issues and empirical facts are clearly presented. The analysis is factually correct. Main conclusions follow from the materials directly from the case.

- Knowledge Base: Proper background information is provided, and the presenters clearly understand the case.

- Style: Main ideas are presented logically and clearly. Appropriate use of technology. The presenters maintained the interest of the audience.

Individual Report: You will write a ONE-PAGE briefing note titled, "Two things I would do the same and one thing I would do differently if I had been in President Obama's position." Please be sure to rationalize your choices.

Assignment # 5: Role-Play Adaptive Leadership (Group (20%) + Individual (20%)) - Due Week 10

In this assignment, you will work in groups of four to role play and debate a decision related to a real-world scenario. The purpose of this assignment is to develop your leadership skills to navigate complexity. You will also learn how to apply key adaptive leadership competencies to decision making.

The assignment has four parts:
A. Choose a scenario from a list of cases (to be provided in-class). Each scenario involves a decision that has systems implications and multiple perspectives. For example, one scenario is about whether to use in public spaces (By week 2).

B. Assign roles to each group member. One role is the decision maker, who has the authority and responsibility to make the final decision. The other three roles are stakeholders, who have different interests and opinions on the decision (By Week 6).

C. Prepare and conduct a role play and debate session. Each group will have 15 minutes to present their scenario, role play the decision-making process, and debate the pros and cons of different options. The decision maker should explain their reasoning and justify their choice at the end.

D. Each group will have to submit a summary note addressing the following questions:

    a. What is the issue? What is your solution?
    b. Why do you think this is the best solution?
    c. What do you think are the main barriers to this solution?
    d. Was the solution agreed to by all stakeholders or did one stakeholder have more influence? Why?

Your summary note should be written in a professional tone, using plain language. Your summary note should be as short as possible, ideally one page and no more than two pages (12pt font).

This assignment will be graded using the following criteria:
Group Performance (20%)

Groups must clearly understand the issue, its complexity, key stakeholders, and their perspectives. Group grades will be assessed based on four criteria: content, organization, delivery, and teamwork.

- *Content:* The quality and accuracy of the arguments and evidence presented by the group demonstrated a clear understanding of the topic and the relevant facts, sources, and perspectives.

- *Organization:* The structure and coherence of the group's presentation followed a logical sequence and transition, and the group allocated an appropriate amount of time for each speaker and their perspectives.

- *Delivery:* The group's arguments are spoken confidently and persuasively, using appropriate language, tone, and voice. The group used nonverbal cues, such as eye contact, gestures, and facial expressions, to enhance their message.

- *Teamwork:* The group's presentation shows evident collaboration and engagement of all members. Their arguments showed clear team preparation, practice, and coordination. They complemented each other during the role play and showed respect for their teammates.

- *Quality of Summary Note:* The group's summary note addresses all the key questions. It uses clear, concise, and professional language, avoids jargon and acronyms, follows grammatical and spelling rules, and adopts an appropriate business writing style.

Individual Performance (20%)
Individuals must demonstrate they have researched the topic, prepared arguments, and evidence from the perspective of the role they are playing, and they can present their arguments in a structured and persuasive manner. Further, individuals need to demonstrate they can respond to the other stakeholders' arguments and questions in a respectful and persuasive manner.

Assignments: General Rules

- Please contact the instructor a reasonable time <u>before</u> the submission deadline if, for any reason, you require an extension for any assignment. Please note that a few hours prior to the deadline is not considered reasonable. Extensions are only granted in justified circumstances, with submission of supporting documentation upon request.
- Assignments received late <u>without</u> an approved extension will receive the standard MBA penalty – i.e., one letter grade applied <u>each</u> week (or fraction thereof) that the assignment is late. For details see the *MBA Guideline on Assignment Submission*.

- If you face personal circumstances that might interfere with your performance in this class, please alert the instructor as soon as possible. If you contact the instructor after missing several classes, or an assignment, the instructor's ability to help will be limited. If you require special accommodations because of a disability, please advise the instructor immediately.
- This course will maintain a website within Canvas LMS (Learning Management System). Please check it frequently to follow key announcements and any changes to the schedule or readings.
- The classroom time will be spent reinforcing, clarifying and applying concepts you learned in the required reading materials. Please carefully read and make every effort to understand the assigned readings before class.

Submit individual assignments via Canvas *https://schulich.instructure.com/.*

Calculation of Course Grade

In this course, final course grades will be determined by the following process: All assignments and projects will be marked using the letter grades from A+ through F. To calculate students' final grades for this course, letter grades earned on assignments during the term will be converted to Schulich index values (e.g., A+=9) which will then be multiplied by the weight of the assignment and rounded up or down to the nearest full grade point, which is finally translated back into the corresponding letter grade.

Letter Grade	A+	A	A-	B+	B	B-	C+	C	C-	F
Grade Points	9	8	7	6	5	4	3	2	1	0

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor.

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

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http://schulich.yorku.ca/current-students/academic-honesty/

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For counseling & disability services, contact Student Services or see http://www.yorku.ca/cds/.

Session	Date	Session Focus	Required Reading
1	Sept 12th	**Course Overview** **Systems Building Blocks: Healthcare Context**	Savigny, D., and Adam, T. (2009) Systems Thinking for Health Systems Strengthening. Alliance for Health Policy and Systems Research, World Health Organization. available from https://www.who.int/alliance-hpsr/resources/9789241563895/en/ Sriharan A. How to Lead an Organization Toward Systemic Transformation. Front Health Serv Manage. 2021 Jul 1;37(4):38-41. Available via Library subscription
2	Sept 19th	**Systems Thinking to Redesign Healthcare**	Arnold, R. D., & Wade, J. P. (2015). A definition of systems thinking: A systems approach. *Procedia computer science*, *44*, 669-678. Available via Library subscription Seijts, G., Way, R. Triage at Rouge Valley Health System. Available via course pack. Parker, G., Smith, T., Shea, C., Perreira, T. A., & Sriharan, A. (2022). Key Healthcare Leadership Competencies: Perspectives from Current Healthcare Leaders. Healthcare Quarterly (Toronto, Ont.), 25(1), 49-56. Available via Library subscription In-class Application Exercise #1
3	Sept 26th	**The Role of Stakeholder Engagement** LEADER'S JOURNEY Guest: Nitin Jain, President, and CEO of Sienna Living, will share how he led Sienna Living through a major crisis during the COVID-19 pandemic and created a thriving organization.	Sriharan, A., et al (2022). Public health and health sector crisis leadership during pandemics: a review of the medical and business literature. Medical Care Research and Review, 79(4), 475-486. Available via Library subscription Savage, G. T., Dunkin, J. W., & Ford, D. M. (2004). Responding to a crisis: A stakeholder analysis of community health organizations. *Journal of health and human services administration*, 383-414. Available via Library subscription Reflection Journal #1

4	Oct 3rd	**Politics of Systems Transformation: Professions, Hierarchies and Culture**	Why Do Surgeons Schedule Their Own Surgeries? David Johnston, Adam Diamant, Fayez Quereshy. Journal of Operations Management, 65.3 (2019): 262-281 Available via Library website Janus, Katharina. The Effect of Professional Culture on Intrinsic Motivation Among Physicians in an Academic Medical Center. Journal of Healthcare Management 59(4): p 287-304, July–August 2014.Available via Library website Meister, D. Mark, K. University Health Network: The MOE-MAR Initiative. Available through course pack. Spear. (2005). Fixing health care from the inside, today. *Harvard Business Review*, *83*(9), 78–158. - – Available via Library website In-class Application Exercise #2
5	Oct 10th	**Why Communication Matter?** LEADER'S JOURNEY Guest: Professor Joseph Mapa, Former President, and CEO Sinai Health Systems. Professor Mapa will share the evolution of Mount Sinai Hospital into Sinai Health Systems	Salem, P. (2008). The seven communication reasons organizations do not change. *Corporate Communications: An International Journal*, *13*(3), 333-348. Available via Library website Falk, E., & Scholz, C. (2018). Persuasion, influence, and value: Perspectives from communication and social neuroscience. *Annual review of psychology*, *69*, 329-356. Available via Library website
6	Oct 17th	**Anticipating the Unknown: The Role of Sensemaking** CASE STUDY Triage at Rouge Valley Health System	Maitlis, S., & Christianson, M. (2014). Sensemaking in organizations: Taking stock and moving forward. *Academy of Management Annals*, *8*(1), 57-125.– available via Library website Ancona, Williams, M., & Gerlach, G. (2020). The Overlooked Key to Leading Through Chaos. *MIT Sloan*

			Management Review, *62*(1), 34–39. – available via Library website
			Reflection Journal # 2
	Oct 24th	READING WEEK	
7	Oct 31st	**Inclusive Decision Making**	Kahneman, D., Rosenfield, A. M., Gandhi, L., & Blaser, T. (2016). Noise: How to Overcome the High, Hidden Cost of Inconsistent Decision Making. Harvard Business Review, 94(10), 38–46. – available via the library website
			Norheim, O. F., Abi-Rached, J. M., Bright, L. K., Bærøe, K., Ferraz, O. L., Gloppen, S., & Voorhoeve, A. (2021). Difficult trade-offs in response to COVID-19: the case for open and inclusive decision making. *Nature Medicine*, *27*(1), 10-13.
			Porter, Michael E., and Elizabeth O. Teisberg. "Cleveland Clinic: Transformation and Growth 2015." Harvard Business School Case 709-473, February 2009. (available in Course Pack)
			Assignment # 4 Case Analysis Due
8	Nov 7th	**Shared Visioning and Collective Purpose**	Preston, D., & Karahanna, E. (2009). How to develop a shared vision: The key to IS strategic alignment. *MIS Quarterly Executive*, *8*(1).
			Groysberg, Boris, Nitin Nohria, and Deborah Bell. "Barbara Norris: Leading Change in the General Surgery Unit." Harvard Business School Case 409-090, March 2009.
			Boyatzis, R. E., Rochford, K., & Taylor, S. N. (2015). The role of the positive emotional attractor in vision and shared vision: Toward effective leadership, relationships, and engagement. *Frontiers in psychology*, 670.available via the library website
9	Nov 14th	**Building Trust** CASE STUDY: Arpita Agnihotri et al. Microsoft	Zak, P. J. (2017). The neuroscience of trust. *Harvard business review*, *95*(1), 84-90. – available via the library website

| | | | Focusing on the Healthcare Vertical. | Zak, P. J. (2018). The neuroscience of high-trust organizations. *Consulting Psychology Journal: Practice and Research*, *70*(1), 45.– available via the library website

Smollan, R. K. (2013). Trust in change managers: the role of affect. *Journal of Organizational Change Management*.Smollan, R. K. (2013). Trust in change managers: the role of affect. *Journal of Organizational Change Management*.– available via the library website

Reflection Journal # 3 |
|---|---|---|---|---|
| 10 | Nov 21st | **Hot Topics in Health Sector Leadership** | | Assignment # 5 Due: Class Presentation Role Playing- Adaptive Leadership |
| 11 | Nov 28th | **Sustaining Transformation** | | Quinn, R, E. Thanko, A, V. Creating a Purpose-Driven Organization. HBR. July 01, 2018

Weil, M., Reddin, C. Boldly Go: Character Drives Leadership at Providence Healthcare. Ivey Publishing. 2017

In-class Mini Assignment # 3 |
| 12 | Dec 5th | **Emotions and Cognitive Demands** | | Benson. (2005). Are you working too hard? A conversation with mind/body researcher Herbert Benson. *Harvard Business Review*, *83*(11), 53 – Available via library website

Boyatzis, R. E., Rochford, K., & Jack, A. I. (2014). Antagonistic neural networks underlying differentiated leadership roles. *Frontiers in human neuroscience*, *8*, 114. Reflection Journal #4 |

MEMORANDUM
York University Libraries

To: Abi Sriharan, Senior Scientist and Research Director, Krembil Centre for Health Management and Leadership, Schulich School of Business

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

Date: April 3, 2023

Subject: Library Statement of Support – HIMP 6140: Leading Health Sector Transformation

Summary

York University Libraries (YUL) is well positioned to support the proposed course. Students can make use of an array of library resources and services to complete the assignments in this course, such as Case Report assignment. This statement highlights offerings related to the major themes of the course, such as healthcare management and leadership in the health care sector.

Course Readings & Materials

The course outline lists readings such as scholarly articles, trade articles, and business cases. The scholarly articles and most of the trade articles are all available through YUL's electronic journal collections.

The course proposal states that the students will be provided with a course pack that they can purchase. The course pack will include all of the required readings and the Harvard Business case studies. The Schulich School of Business will work with the Harvard Business Publishing site to prepare this course pack.

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:

- Health services administration; Leadership; Strategic leadership; Management; Organizational change

Historically, textbook publishers have not made their electronic content available for purchase by libraries. This remains an ongoing challenge. Library personnel can assist with locating Open Access alternatives. Furthermore, the Libraries' Open Scholarship department offers support to researchers on digital publishing, open repositories, and Creative Commons licensing.

The Omni single-search interface provides students with access to a wide range of materials, including books, book chapters, articles, dissertations, streaming media, etc. Library users may also request items from partner libraries through Omni. A selection of electronic collections of particular interest are highlighted below. The A-Z list on the Libraries' website provides a complete listing of electronic offerings.

Core Industry Research Databases:

- IBISworld: includes niche industry reports for health care industries in Canada, the U.S., & China.
- Marketline Advantage: includes market data & industry reports for health care industries.
- FitchConnect: includes industry and country risk reports for over 200 countries.
- Statista: provides access to charts, data tables, and reports for a variety of health industry topics.
- Gartner Intraweb: provides access to specialized information technology (IT) reports on health industry IT topics.

Core Company Research Databases:

- Mergent Online: includes publicly-traded company financials & brokerage research reports
- Marketline Advantage: includes company reports

Business Scholarly & Trade Publication Databases:

- Proquest Business Complete: provides access to core scholarly and trade business publications.
- Business Source Complete: provides access to core scholarly and trade business publications, including the key trade publication, *Harvard Business Review.*

Health Journal Databases:
- Medline database
- Cumulative Index to Nursing and Allied Health (CINAHL) database
- Nursing and Allied Health Source database
- PsycINFO

Newspaper/ Magazine Databases:

- Factiva
- Nexis Uni
- Press Reader

eBook Platforms:

- De Gruyter eBooks
- Elgar Online
- 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 of Interest:

- [Health Industry Management Guide]()
- [Company Research Guide]()
- [Industry Research Guide]()
- [Business Citation Guide]()

Research Help

Online [research assistance]() is available in both French and English via chat, text, and email. In addition, students and faculty can book [one-hour research consultations]() with a specialist librarian. The Libraries also offer a virtual drop-in service hosted through Zoom for help in real-time.

Accessibility Services

Located on the first floor of the Scott Library (Keele Campus), [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.

Schulich School of Business

Memorandum

To: Faculty Council, Schulich School of Business
From: Matthias Kipping, Associate Dean, EMBA
Date: May 19, 2023
Re: Change in Designation of Kellogg Faculty Representative on the Kellogg-Schulich EMBA Committee

Motion:

1. To replace "Director EMBA Global Network (Kellogg)" on the Kellogg-Schulich EMBA committee with "Kellogg Nominated Representative 1 of 2"

2. To replace "Assistant Dean EMBA Global Network (Kellogg)" on the Kellogg-Schulich EMBA committee with "Kellogg Nominated Representative 2 of 2"

Rationale:

Link to the Kellogg-Schulich EMBA Committee
Mandate: http://teachingandlearning.schulich.yorku.ca/wp-content/uploads/2019/03/EMBA-Program-Committee-Mandate.pdf

1. The role of "Director EMBA Global Network (Kellogg)" no longer exists at Kellogg and hence should be removed from the mandate of the Kellogg-Schulich EMBA committee mandate.

2. It is not required for the Assistant Dean EMBA Global Network (Kellogg) to serve on the Kellogg-Schulich EMBA committee. Kellogg can nominate a faculty representative to serve on the committee.

Graduate Studies, Office of the Dean
York University

230 York Lanes - 4700 Keele Street
Toronto, ON, Canada M3J 1P3

Tel: (416) 736-5521
gradstudies.yorku.ca

EMBA 6435 2.0 Digital User Engagement

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

2. **Course Number:** EMBA 6435

3. **Credit Value:** 2.0

4. **Long Course Title:** Digital User Engagement

5. **Short Course Title:** Digital User Engagement

6. **Effective Session:** Winter 2023

7. **Calendar (Short) Course Description:**
This course examines the notion of user engagement and surveys relevant behavioural theories which students can apply to the study of online experiences and put them into use in collaboration with Israeli start-ups. It utilizes frameworks from tech management, UX, strategy and product management as well as tools from gamification, storytelling, and community building to address present-day challenges.

8. **Expanded Course Description:**
This course utilizes frameworks from tech management, UX, strategy and product management, as well as tools from the fields of gamification, storytelling, and community building to address these present-day challenges. It will examine the notion of user engagement, survey relevant behavioural theories which students can apply to the study of online experiences and put them into use in collaboration with Israeli start-ups. Israel has a wide variety of B2C start-ups whose business model is dependent on building a global community of engaged users with an emphasis on social platforms and game environments. The students in this course will act as business consultants to leading Israeli ventures. They will analyse the current challenges regarding user engagement, come up with relevant and actionable solutions through intensive workshops and engage in feedback sessions with the start-up to sharpen their ideas.

9. **Course Learning Outcomes:**
Upon completion of the course, students will be able to:
• Solve real user engagement problems for tech start-ups.
• Master the notion of "play" as a user engagement driver and theory of flow and how it can help create better products, services and experiences.
• Learn to model user social dynamics with a website through the ladder of participation and other engagement and user experience models.
• Improve their storytelling capabilities with narrative design tools and models.
• Identify the most pressing ethical and societal issues in regards to user engagement and online experiences.

10. **Rationale:**
In recent years, online ventures and firms have sought after engaging, meaningful and memorable onsite experiences that increase users' satisfaction and retention. However, the questions regarding how one should create and manage such experience still puzzles

managers: from early-stage entrepreneurs to top management of established firms. It is therefore crucial that senior managers and future executives in these kinds of organizations learn to address these challenges. This course will allow them to do so in practical collaboration with Israeli B2C start-ups.

11. Evaluation:

Given the nature of the course, assessment will largely be team-based, comprising daily pitch decks (40% in total) and a final project (50%). This will be complemented at the individual level with 10% for active class participation and peer review.

12. Integrated Courses:

NOT integrated

13. Crosslisted Courses:

NOT crosslisted

14. Faculty Resources:

This course is being offered as a global elective over one week during the Winter term by our partner, the Kellogg-Recanati EMBA program at the Coller School of Management, Tel Aviv University in Israel. It will be taught by Dr. Lior Zalmanson, who is a senior lecturer at the Technology and Information Management Program of the Coller School. His research on social media, user engagement, internet business models, human-AI interaction, and algorithmic management has won multiple awards and grants and has been published, among others, in *MIS Quarterly*, *Academy of Management Journal*, *Journal of Management Information Systems*, and *MIT Sloan Review*. He also received multiple teaching awards for his experiential courses in user engagement and online communities.

15. Physical Resources:

Classes for this course will be held over one intensive week at the Coller School of Management, which will provide all the necessary physical resources.

16. Bibliography and Library Statement:

The recommended readings listed in the detailed course outline will be made available to all participating students through the Learning Management System of the Kellogg-Recanati EMBA Program, 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: December 16, 2022

Subject: Library Statement of Support – Digital User Engagement (EMBA 6435 2.0)

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 that can be used in the pitchdeck assignments and the final project for 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, User Experience, Usability, Customer Experience, Technological Innovations, & Innovation Technology 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, specialized business database reports, streaming media, etc. that students may wish to consult, especially when completing the assignments for this 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:

- Gartner Intraweb
- Mergent Online
- Marketline Advantage
- Statista
- Complete listing of business 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.

Kellogg ⊕ Recanati

EXECUTIVE MBA GLOBAL NETWORK

Course Number – Digital User Engagement

Prerequisites: None

Parallel requirements: None

Spring – 2023 (Global Week Tel Aviv)

Day	Hour	Lecturer	Email	Telephone
Sunday-Thursday	Sunday (10- 3PM) Monday-Thursday (09-12:30 PM)	Dr. Lior Zalmanson	zalmanso@tau.ac.il	-

Teaching Assistant (TA): Noam Kuperstein

Office Hours: Everyday, right after class

Course Units

1 course unit = 4 ECTS units
The ECTS (European Credit Transfer and Accumulation System) is a framework defined by the European Commission to allow for unified recognition of student academic achievements from different countries.

Course Description

This course utilizes frameworks from tech management, UX, strategy and product management, as well as tools from the fields of gamification, storytelling, and community building to address these present-day challenges.
This course will examine the notion of user engagement, survey relevant behavioral theories which students can apply to the study of online experiences and put them into use in collaboration with Israeli start-ups.

Setting: Israel has a wide variety of B2C start-ups whose business model is dependent on building a global community of engaged users with an emphasis on social platforms and game environments. The students in this course will act as business consultants to leading Israeli ventures. They will analyze the current challenges regarding user

engagement, come up with relevant and actionable solutions through intensive workshops and engage in feedback sessions with the start-up to sharpen their ideas.

Course Challenge:
In recent years, online ventures and firms have sought after engaging, meaningful and memorable onsite experiences that increase users' satisfaction and retention.
However, the questions regarding how should one create and manage such experience still puzzles managers: from early-stage entrepreneurs to top management of established firms.

Course Objectives

Upon completion of the course, the student will be able to:

1. Solve real user engagement problems for tech start-ups.
2. Cross pollination between MBA students (Global, Executive) and the Israeli Start-Up Ecosystem.
3. Master the notion of "play" as a user engagement driver and theory of flow and how they can make you create better products, services and experiences.
4. Learn to model user social dynamics with a website through the ladder of participation and other engagement and user experience models.
5. Improve your storytelling capabilities with narrative design tools and models.
6. Identify the most pressing ethical and societal issues in regards to user engagement and online experiences.
7. Engage in practical workshops to develop relevant business analysis solutions pitch decks.

Evaluation of Student and Composition of Grade

Percentage	Assignment	Date	Group Size/Comments
10%	Active Participation and Peer Review	All Week	Individual
40%	Daily Pitchdecks	Monday-Thursday (Every other day)	4-5 students
50%	Final Project	A week after class	4-5 students

* According to University regulations, participation in all classes of a course is mandatory (Article 5).
* Students who absent themselves from classes or do not actively participate in class may be removed from the course at the discretion of the lecturer. (Students remain financially liable for the course even if they are removed.)

Kellogg-Recanati International Executive MBA Program
Coller School of Management, Tel Aviv University, Tel Aviv 6997801, Israel
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E-mail: kremba@tauex.tau.ac.il | Web: en-coller.tau.ac.il/kr-emba

Northwestern University

TEL AVIV UNIVERSITY אוניברסיטת תל אביב

Course Assignments

Participation - active participation and peer review throughout the entire week.

Pitchdecks - showcased throughout the course - include:
1. Engagement Challenges Presentation - full grade will be given based on correctly identified challenges, explained in concise yet exact manner. Proof of business relevance. Showcases an understanding of the startup.
2. Engagement Solutions Presentation - full grade will be given based on understanding of the theoretical modeling. Relevant, creative and thoughtful implementation of the models.

Final Project - developed engagement solutions slide deck and supplementary document (5 pages) submitted at the end of course.

Evaluation of the Course by Student

Following completion of the course students will participate in a teaching survey to evaluate the instructor and the course, to provide feedback for the benefit of the students, the teachers and the university.

Course Site (Moodle)

The course site will be the primary tool to communicate messages and material to students. You should check the course site regularly for information on classes, assignments and exams, at the end of the course as well.
Course material will be available on the course site.
Please note that topics that are not covered in the course material but are discussed in class are considered integral to the course and may be tested in examinations.

Course Outline*

Date	Topic(s)
Sunday	**User Engagement KickOff – Introduction of Course Materials, Methodology** Theory: User engagement 101, including an introduction to experience design, economics, and ethical aspects. The first session will include a particular focus to understanding different challenges regarding user engagement and the notions of trust and cognitive load

Monday	**Storytelling features** Presentation from each group on respective start-up engagement challenges in terms of trust and cognitive load Theory: Working with the concept of narrative, we will study the science behind storytelling features, the role avatars play in websites, and the importance of a script and structure to a website experience. Mini Hackathon: In groups, we will write "screenplays" for the apps/website of the start-up, coming up with a narrative structure (hero's journeys) fitted for different user needs.
Tuesday	**The Ladder of Participation** Presentation from each group on respective solutions using narrative and user journeys. Theory: Working with the concept of community, we will study participatory models such as "the ladder of participation" and the notion of organizational commitment from business literature, to improve our understanding of the hierarchal notion of user engagement and how to best cater different users' motivations. Mini Hackathon: In groups, we will invent engagement ladders that consider the relevant user personas for the start-up.
Wednesday	**Flow experiences** Presentation from each group on respective solutions using community. Theory: Working with the concept of play, we will study the notion of "flow experiences" and how playful features and gamification affect user attention and satisfaction. Mini-Hackathon: In groups, we will develop flow concepts that address engagement challenges
Thursday	**Live presentation of Final Projects & Course Summary** Pitch Deck Presentation

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E-mail: kremba@tauex.tau.ac.il | Web: en-coller.tau.ac.il/kr-emba

Northwestern University

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	Presentation from each group on respective solutions using flow and games
	We will conclude the course with a last feedback session looking back at all the different ideas and solutions provided to the start-ups.

*Subject to change

Required Reading

Due to the intensive nature of the class, there is no required reading

Recommended Reading

1) Franke, N., Schreier, M., & Kaiser, U. (2010). The "I designed it myself" effect in mass customization. Management science, 56(1), 125-140.

2) Nakamura, J., & Csikszentmihalyi, M. (2014). The concept of flow. In Flow and the foundations of positive psychology (pp. 239-263). Springer, Dordrecht.

3) O'Brien, Heather L., Paul Cairns, and Mark Hall. "A practical approach to measuring user engagement with the refined user engagement scale (UES) and new UES short form." International Journal of Human-Computer Studies 112 (2018): 28-39.

4) Oestreicher-Singer, G ., & Zalmanson, L. 2013. "Content or Community? A Digital Business Strategy for Content Providers in the Social Age," MIS Quarterly, (37:2), pp. 591-616.

5) Osterwalder, Alexander, and Yves Pigneur. Business model generation: a handbook for visionaries, game changers, and challengers. John Wiley & Sons, 2010.

6) Pine, B. Joseph, and James H. Gilmore. "Welcome to the experience economy." Harvard business review 76 (1998): 97-105.

7) Piskorski, Mikolaj Jan. A social strategy: How we profit from social media. Princeton University Press, 2014.

8) Rose, Frank. The art of immersion: How the digital generation is remaking Hollywood, Madison Avenue, and the way we tell stories. WW Norton & Company, 2012.

9) Wiertz, Caroline, and Ko de Ruyter. "Beyond the call of duty: Why customers contribute to firm-hosted commercial online communities." *Organization studies* 28.3 (2007): 347-376.

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Northwestern University

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Geoffrey Kistruck, Area Coordinator, Sustainability
          Ruodan Shao, Area Coordinator, Organization Studies

Date: April 18, 2023
Re: Course rubric change for ORGS 7020

Motion: That Faculty Council approve the change in rubric of ORGS 7020 – Advanced Topics in Organization Theory to SUST 7020 – Advanced Topics in Organization Theory

Rationale: This course was originally approved before the Sustainability Area was created. The course has a strong connection to topics in sustainability and will be one of the required courses for PhD students in the Sustainability stream. In addition, the faculty members with the expertise needed to teach the course have moved from ORGS Area to SUST Area. The course will continue to be available to PhD students in ORGS and other streams. It is still a recommended course for students in ORGS, SGMT, and Accounting.

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Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
Schulich PhD Program

2. Responsible Unit:
Organization Studies and Sustainability Areas

3. Subject Code (Rubric) and Course Number:
ORGS 7020

4. Credit Value:
3.0 credit course

5. Long Course Title:
Advanced Topics in Organization Theory

6. Short Course Title:
Advanced Topics in Organization Theory

7. Type of Course Change(s) (indicate all that apply):

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

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

9. **Rationale:**

This course was originally approved before the Sustainability Area was created. The course has a strong connection to topics in sustainability and will be one of the required courses for PhD students in the Sustainability stream. In addition, the faculty members with the expertise needed to teach the course have moved from ORGS Area to SUST Area. The course will continue to be available to PhD students in ORGS and other streams. It is still a recommended course for students in ORGS, SGMT, and Accounting.

10. Proposed Course Information:
This course introduces students to leading paradigms and current topics in organization theory. Students obtain an intensive overview of "macro" theories in organizational behaviour and develop an ability to assess organization theory and research critically and comprehensively. Class discussions focus on the strengths, weaknesses and contributions of leading-edge theories and topics; and students are encouraged to think creatively about future directions that various topics and theories might take to advance the field's understanding of organizations. By the conclusion of the course, students: (a) are familiar with important sources and references on prevailing issues in organization theory; (b) have a solid grasp of advanced theory and research on a breadth of topics in macro organizational behaviour; (c) have a better understanding of the process of writing theoretical articles; and (d) possess the ability to evaluate critically the contributions of various research streams to the field of organization theory.

11. Enrolment Notes:
No changes to enrolment from existing requirements

12. Consultation:

The Sustainability and Organization Studies area coordinators have been consulted and both agree to the proposed motion.

Originator:

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title	**Title**
<u>Current:</u> ~~Current Course Rubric/Number: ORGS 7020 3.0~~ Title: Advanced Topics in Organization Theory Calendar Description: This course introduces students to leading paradigms and current topics in organization theory. Students obtain an intensive overview of "macro" theories in organizational behaviour and develop an ability to assess organization theory and research critically and comprehensively. Class discussions focus on the strengths, weaknesses and contributions of leading-edge theories and topics; and students are encouraged to think creatively about future directions that various topics and theories might take to advance the field's understanding of organizations. By the conclusion of the course, students: (a) are familiar with important sources and references on prevailing issues in organization theory; (b) have a solid grasp of advanced theory and research on a breadth of topics in macro organizational behaviour; (c) have a better understanding of the process of writing theoretical articles; and (d) possess the ability to evaluate critically the contributions of various research streams to the field of organization theory.	<u>Proposed:</u> New Course Rubric/Number: **SUST** 7020 3.0 Title: Advanced Topics in Organization Theory Calendar Description: no change

Geoffrey Kistruck	April 18, 2023
Signature	Date

Geoffrey Kistruck	Sustainability
Name	Area or Specialization

Approvals:

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

Geoffrey Kistruck	April 18, 2023
Signature	Date

Geoffrey Kistruck	Sustainability
Name	Area or Specialization

RShao	April 18, 2023
Signature	Date

Ruodan Shao	Organization Studies
Name	Area or Specialization

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

Signature	Date

Peter Darke	PhD Program

Name of Program Director	Program

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

Signature	Date

Peter Darke	PhD Committee
Name of Committee Chair	Committee

SUST 7020 3.0 Advanced Topics in Organization Theory

Course Outline
Winter 2024

Date and Time TBA

Instructor	**Assistant**
Dr. Maxim Voronov	Menglin (Mary) Bai
Room G328, McEwen Building	G324, MB
mvoronov@schulich.yorku.ca	416.736.5268
Office hours: by appointment	mbai@schulich.yorku.ca

Brief Course Description

This course introduces students to leading paradigms and current topics in organization theory. Students obtain an intensive overview of "macro" theories in organizational behaviour and develop an ability to assess organization theory and research critically and comprehensively. Class discussions focus on the strengths, weaknesses and contributions of leading-edge theories and topics; and students are encouraged to think creatively about future directions that various topics and theories might take to advance the field's understanding of organizations. By the conclusion of the course, students: (a) are familiar with important sources and references on prevailing issues in organization theory; (b) have a solid grasp of advanced theory and research on a breadth of topics in macro organizational behaviour; (c) have a better understanding of the process of writing theoretical articles; and (d) possess the ability to evaluate critically the contributions of various research streams to the field of organization theory.

Contents

Course Learning Outcomes

At the conclusion of this course, the student will possess an in depth understanding of material relevant to the core theories and topics in organization theory. Students will possess enhanced skills in analysing academic material and the strengths and limitations of different perspectives and topics.

Deliverables at a Glance

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

Assignment/Task	Quantity	% Weight	Total %	Author
Paper	1	80	80	Individual
Presentation of paper	1	20	20	Individual
			100%	

For details, see "Paper & Presentation: Descriptions" and "Evaluation of Written Assignments/Projects" on page 25.

Course Material

Required reading for this course includes all articles in listed below. These readings are all accessible via York Libraries accessible here. It is your responsibility to search, find and download these articles to read for class. To do this, click on the "eresources" tab on the York Libraries website and insert the name of the journal. Once you find the journal, go to the appropriate volume and issue to find the article. If you have any trouble finding them, please don't hesitate to contact me or someone from the Bronfman library for assistance..

Supplementary Readings

The outline provides supplementary readings for each topic covered in the course. You will not be expected to have read these for class. Additional readings are also suggested in this outline for those students wanting more information on a particular topic or theory. In addition, two supplementary textbooks are suggested for your use in the future but these are not ordered for class:

1. Scott, R. (2008). Organizations: Rational, Natural and Open Systems, Englewood Cliffs, NJ: Prentice Hall, 5th Edition.

2. Clegg, S.R., Hardy, C., Lawrence, T. B., & Nord, W. R. (2006). *The Sage Handbook of Organization Studies*, London: Sage.

Student Preparation for Class and Class Participation: Expectations

Students are expected to come to class having read all required material thoroughly and to be prepared to discuss this material thoroughly and identify its strengths and weaknesses.

This course is an advanced research seminar based on class discussion. Students will be expected to participate actively in the seminar.

Class-by-Class Syllabus

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

Note: If any changes in this schedule become necessary, notifications will be made via to the students' Schulich email accounts, notifying them of the change.

Date   **Introduction**
Class 1   (1) Course overview
              (2) Expectations for upcoming seminars
              (3) Introduction to journals and conferences
              (4) Research interests (yours and ours)
              (5) Writing papers

Readings

1. Sutton, R. I. & Staw, B. M. (1995). What theory is not. Administrative Science Quarterly, 40, 371-384.

2. Whetten, D. A. (1989). What constitutes a theoretical contribution? Academy of Management Review, 14, 490-495.

3. Byron, K. & Thatcher, S. M. B. (2016). Editors Comments: What I know now that I wish I knew then - Teaching Theory and Theory Building. Academy of Management Review, 41, 1-8.

Supplementary Readings

4. Bacharach, S. B. (1989). Organizational theories: Some criteria for evaluation. *Academy of Management Review*, *14*, 496-515.

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

6. Whetten, D. A. (2001). 2000 Presidential Address: What Matters Most. *Academy of Management Review*, *26*, 175-178.

Additional Suggested Sources

1. Davis, G. F. (2006). Mechanisms and the theory of organizations. *Journal of Management Inquiry*, *15*, 114-118.

2. McKelvey, B. (1997). Quasi-natural organization science. *Organization Science*, *8*, 352-380.

3. Weick, K. E. (1992). Agenda setting in organizational behavior: A theory-focused approach. *Journal of Management Inquiry*, *1*, 171-182.

4. Pfeffer, J. (1993). Barriers to the advance of organizational science: Paradigm development as a dependent variable. *Academy of Management Review*, *18*, 599-620.

Date   **Structural Contingency Approach**
Class 2

Readings

1. Pfeffer, J. (1982). Organization-Level Rational Action. *Organizations and Organization Theory*. Boston, MA: Pitman. 147-163.

2. Mintzberg, H. (1981). Organization design: Fashion or fit? *Harvard Business Review.* 103-116.

3. Van de Ven, A. H., Ganco, M. & Hinings, C. R. (2013). Returning to the frontier of contingency theory of organizational and institutional designs. *Academy of Management Annals*, 7(1), 393-440

4. Dorobantu, S., Kaul, A., & Zelner, B. (2017). Nonmarket strategy research through the lens of new institutional economics. An integrative review and future directions. *Strategic Management Journal,* 38(1): 114-140.

Supplementary Readings

1. Hambrick, D. C. & Cannella, A. A. (2004). CEOs who have COOs: Contingency analysis of an unexplored structural form. *Strategic Management Journal, 25*, 959-979

2. Jarley, P., Fiorito, J. & Delaney, J. T. (1997). A structural contingency approach to bureaucracy and democracy in U.S. national unions. *Academy of Management Journal*, Vol. 40. 831-861.

3. Filatotchev, I. & Allcock, D. (2010). Corporate governance and executive remuneration: A contingency perspective. *Academy of Management Perspective*, 24(1), 20-33.

1. Meznar, M. M. & Johnson, J. H. (2005). Business-government relations within a contingency theory framework: Strategy, structure, fit and performance. *Business and Society*, 44(2), 119-143.

2. Meyer. A. D., Tsui, A. S. & Hinings, C. R. (1993). Configurational approaches to organizational analysis. *Academy of Management Journal*, *36*, 1175-1195.

3. Pennings, J. M. (1992). Structural contingency theory: A reappraisal. In B.M. Staw and L.L. Cummings *Research in Organizational Behavior*, Vol. 14, 267-309. Greenwich, CT: JAI Press, 1992.

4. Van de Ven, A. H. & Drazin, R. (1985). The concept of fit in contingency theory. In L.L. Cummings and B.M. Staw (eds.) *Research in Organizational Behavior*, Vol. 7, 333-365.

5. Gresov, C. (1989). Exploring fit and misfit with multiple contingencies. *Administrative Science Quarterly*, *34*, 431-453.

6. Schoonhoven, C. B. (1981). Problems with contingency theory: Testing assumptions hidden within the language of contingency theory. *Administrative Science Quarterly*, *26*, 349-377.

Additional Suggested Sources

1. La, V., Patterson, P. & Styles, C. (2009). Client-perceived performance and value in professional B2B services: An international perspective. *Journal of International Business Studies*, *40*, 0047-2506.

2. Siggelkow, N. (2001). Change in the Presence of Fit: The Rise, Fall and the Renaissance of Liz Claiborne. *Academy of Management Journal*, *44*, 838-857.

3. Husted, B. (2000). A contingency theory of corporate social performance." *Business and Society*, 39(1), 24-48.

4. Gresov, C. & Drazin, R. (1997). Equifinality: Functional equivalence in organization design. *Academy of Management Review*, *22*, 403-428.

5. Doty, D. H. & Glick, W. H. (1994). Typologies as a unique form of theory building: Toward improved understanding and modelling. *Academy of Management Review*, *19*, 230-251.

6. Doty, D. H., Glick, W. H. & Huber, G. P. (1993). Fit, effectiveness, and equifinality: A test of two configurational theories. *Academy of Management Journal*, *36*, 1196-1250.

7. Donaldson, L. (2001). *The Contingency Theory of Organizations*, Thousand Oaks, CA: Sage.

8. Child, J. (1972). Organizational Structure, Environment and Performance: The Role of Strategic Choice. *Sociology*, *6*, 1-22.

9. Mintzberg, H. (1979). *The Structuring of Organizations*, Englewood Cliffs, NJ: Prentice Hall.

10. Miller, D. & Friesen, P. (1984). *Organizations: A Quantum View*, Englewood Cliffs, NJ: Prentice Hall.

**Date
Class 3**

Resource Dependence Theory

Readings

1. Pfeffer, J. & Salancik, G. R. (2003). The External Control of Organizations. Chapters 1, 2, 3, 4. Stanford University Press.

2. Wry, T., Cobb, I. A. & Aldrich, H. E. (2013). More than a metaphor: Assessing the historical legacy of resource dependence and its contemporary promise as a theory of environmental complexity. *Academy of Management Annals*, 7(1), 441-488.

3. Hillman, A.J., Withers, M. C. & Collins, B. J. (2009). Resource dependence theory: A review. *Journal of Management*, 35(6), 1404-1427.

Supplementary Readings

4. Casciaro, T. & Piskorski, M. J. (2005). Power Imbalance, Mutual Dependence, and Constraint Absorption: A Closer Look at Resource Dependence Theory. Administrative

Science Quarterly, 50, 167-199.

5. Prechel, H. & Morris, T. (2010). The effects of organizational and political embeddedness on financial malfeasance in the largest US corporations: Dependence, incentives, and opportunities. *American Sociological Review*, *75*, 331-352.

6. Davis, G. & Cobb, J. A. (2010). Resource dependence theory: Past and Future. *Research in the Sociology of Organizations*, *28*, 21-42.

7. Finkelstein, S. (1997). Interindustry merger patterns and resource dependence: A replication and extension of Pfeffer (1972). *Strategic Management Journal, 18*, 787-810.

8. Mizruchi, M. & Yoo, M. (2002). Interorganizational power and dependence. *The Blackwell Companion to Organizations*, J. Baum (ed.), 599-620

9. Ingram, P. & Simons, T. (1995). Institutional and resource dependence determinants of responsiveness to work-family issues. *Academy of Management Journal, 38*, 1466-1482.

10. Boyd, B. (1990). Corporate linkages and organizational environment: A test of the resource dependence model. *Strategic Management Journal*, *11*, 419-430.

11. Provan K. et al. (1980). Environmental linkages and power in resource-dependence relations between organizations. *Administrative Science Quarterly*, *25*, 200-225.

Additional Suggested Sources

12. Pfeffer, J. & Salancik, G. R. (2003). *The External Control of Organizations*, Chapters 5-7.

13. Hallen, L., Johanson, J. & Seyed-Mohamed, N. (1991). Interfirm adaptation in business relationships. *Journal of Marketing*, *55*, 29-37.

14. Saidel, J. R. (1991). Resource interdependence: The relationship between state agencies and nonprofit organizations. *Public Administration Review*, *51*, 543-553.

Date Class 4	**Economic Theories of Organizations**

Readings

1. Williamson, O. (1975). Towards a New Institutional Economics. In *Markets and Hierarchies: Analysis and Antitrust Implications* (Chapter 1, pp.1-19). New York, NY: Free Press.

2. Ouchi, W. (1977). Review of markets and hierarchies. *Administrative Science Quarterly*, 540-544.

3. Eisenhardt, K. (1989). Agency theory: An assessment and review. *Academy of Management Review*, 14(1), 57-74.

4. Lubatkin, M. H. (2005). A theory of the firm only a microeconomist could love. *Journal of Management Inquiry*, *14*, 213-216.

5. Lange, T. (2005). A microeconomist's reply to Lubatkin's critique of agency theory. *Journal of Management Inquiry*, 14(4), 404-406.

6. Granovetter, M. (1985). Economic action and social structure: The problem of embeddedness. *American Journal of Sociology*, 91(3), 481-510.

7. Perrow, C. (1985). Economic theories of organization. *Theory and Society.* 15 (1-2): p. 11-45

Supplementary Readings
1. Swedberg, R. (2003). Economic versus sociological approaches to organization theory. In H. Tsoukas & C. Knudson (Eds.), *The Oxford Handbook of Organization Theory (pp.* 373-391). Oxford University Press: Oxford.

2. Eccles, R. (1987). Review of the economic institutions of capitalism: Firms, Markets, Relational Contracting. *Administrative Science Quarterly*, *4*, 602-605.

3. Ghoshal, S., & Moran, P. (1996). Bad for practice: A critique of the transaction cost theory. *Academy of management Review*, *21*(1), 13-47.

4.

5. Bylun, P. L. (2015). Signifying Williamson's contribution to the transaction cost approach: An agent-based simulation of Coasean transaction costs and specialization. *Journal of Management Studies*, 52(1), 148-174.

6. O'Brien, J. P., Barthiban, D. & Yoshikawa, T. et al. (2014). How capital structure influences diversification performance: A transaction cost perspective. *Strategic Management Journal*, 35(7), 1013-1031.

7. Chen, S. F. S. (2010). Transaction cost implication of private branding and empirical evidence. *Strategic Management Journal*, 31(4), 371-389.

8. David, R. J. & Han, S. (2004). A systematic assessment of the empirical support for transaction cost economics. *Strategic Management Journal*, *25*, 39-58.

9. Nickerson, J. A. & Silverman, B. S. (2003). Why firms want to organize efficiently and what keepsthem from doing so: Inappropriate governance, performance, and adaptation in a deregulated industry. *Administrative Science Quarterly*, *48*, 433-465.

10. Madhok, A. (1996). The organization of economic activity: Transaction costs, firm capabilities, and the nature of governance. *Organization Science*, *7*, 577-590.

11. Hennart, J. (1993). Explaining the swollen middle: Why most transactions are a mix of "market" and "hierarchy". *Organization Science*, *4*, 529-547.

12. Hesterly, W. S., Liebeskind, J., & Zenger, T. R. (1990). Organizational economics: An impending revolution in organization theory? *Academy of Management Review*, *15*, 402-420.

13. Davis, G. F. (1991). Agents without principles? The spread of the poison pill through the intercorporate network. *Administrative Science Quarterly*, *36*, 583-613.

14. Williamson, O. & Ouchi, W. (1981). The markets and hierarchies program of research: Origins, implications, prospects. In A. H. Van de Ven & W. F. Joyce (Eds.), *Perspectives on Organization Design and Behavior* (pp. 347-406). New York, NY: Wiley.

Additional Suggested Sources

15. Jacobides, M. D. & Winter, S. G. (2005). The co-evolution of capabilities and transaction costs: Explaining the institutional structure of production. *Strategic Management Journal*, *26*, 395-413.

16. Geyskens, I., Steenkamp, J., & Kumar, N. (2006). Make, buy or ally: A transaction cost theory meta-analysis. *Academy of Management Journal*, *49*, 519-540.

17. Williamson, O. (1999). Strategy research: Governance and competitive perspectives. *Strategic Management Journal*, *20*, 1087-1108.

18. Williamson, O. (1975). *Markets and Hierarchies: Analysis and Antitrust Implications*, New York, NY: Free Press.

19. Williamson, O. (1985). *The Economic Institutions of Capitalism: Firms, Markets, Relational Contracting*, New York, NY: Free Press.

20. Williamson, O. E. (1993). Calculativeness, trust and economic organization. *Journal of Law and Economics*, Vol. XXXVI, 453-502.

21. Williamson, O. E. (1991). Strategizing, economizing, and economic organization. *Strategic Management Journal*, *12*, 75-94.

22. Hennart, J. (1991). The transaction costs theory of joint ventures: An empirical study of Japanese subsidiaries in the United States. *Management Science*, *37*, 483-497.

23. Hennart, J. (1988). A transaction costs theory of equity joint ventures. *Strategic Management Journal*, *9*, 361-374.

24. Ghoshal, S. & Moran, P. (1996). Bad for practice: A critique of the transaction cost theory. *Academy of Management Review*, *21*, 13-47.

25. Williamson, O. E. (1996). *The Mechanisms of Governance*, New York, NY: Oxford University Press.

Date   **Ecology Theory**
Class 5

Readings
1.   Hannan, M. & Freeman, J. (1977). The Population Ecology of Organizations. *American Journal of Sociology*, 82(5), 929-964. <u>NOTE: Read pages 929-940 only</u>.

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

3.   Carroll, G. R. & Hannan, M. T. (1989). Density dependence in the evolution of populations of newspaper organizations. *American Sociological Review*, *54*, 524-548.

4.   Baum, J. & Amburgey, T. L. (2005). Organizational ecology. In Baum J. (ed.) *Companion to Organizations*, Blackwell, Oxford: 304-326.

5.   Simons, T. & Ingram, P. (2003). Enemies of the state: The interdependence of institutional forms and the ecology of the Kibbutz, 1910-1997. *Administrative Science Quarterly*, *48*, 592-621.

Supplementary Readings
1.   Yu, D., Lu, J. W. & Gu, Q. (2014). Organizational forms and multi-population dynamics: Economic transition in China. *Administrative Science Quarterly*, *59*, 517-547**.**

2.   Amezcua, A. S., Grimes, M. G., Bradley, S. & Wiklund, J. (2013). Organizational sponsorship and founding environments: A contingency view on the survival of business-incubated films, 1994-2007. *Academy of Management Journal*, *56,* 1628-1654.

3.   Mezias, S. J. & Boyle, E. (2005). Blind trust: Market control, legal environments, and the dynamics of competitive intensity in the early American film industry", *Administrative Science Quarterly*, *50*, 1-34.

4.   Freeman, J. H. & Audia, P. G. (2006). Community Ecology and the Sociology of Organizations. *Annual Review of Sociology*, *32*, 145-169.

5.   Barron, D. N. (1999). The structuring of organizational populations. *American Sociological Review*, *64*, 421-445.

6.   Hannan, M. T. & Carroll, G. R. (2000). The Demography of Corporations and Industries, Princeton, N.J. *Princeton University Press*, Chapters 1-3.

7.   Baum, J. (1996). Organizational Ecology in S.R. Clegg, C. Hardy and W. Nord (Eds.*),* *Handbook of Organizational Studies*, London, Sage, 77-114.

8.   Haveman, H. A. (1993). Follow the leader: Mimetic isomorphism and entry into new markets. *Administrative Science Quarterly*, *38*, 593-627.

9.   Baum, J.A.C. & Oliver, C. (1992). Institutional embeddedness and the dynamics of organizational populations. *American Sociological Review*, *57*, 540-559.

Additional Suggested Sources

1. Ang, S., Benischke, M. H. & Doh, J. P. (2015). The interactions of institutions on foreign market entry mode. *Strategic Management Journal*, 36(10), 1536-1553.

2. Popielarz, P. A. & Neal, Z. P. (August 2007). The Niche as a Theoretical Tool. *Annual Review of Sociology*, *33*, 65-84

3. Dobrev, S. D., Kim, T., & Carroll, G. R. (2003). Shifting gears, shifting niches: Organizational inertia and change in the evolution of the U.S. automobile industry, 1885-1981. *Organization Science*, *14*, 264-282.

4. Amburgey, T. L. & Singh, J. V. (2002). Organizational evolution. In Baum, J. (Ed.), *Companion to Organizations* (pp. 327-343). Blackwell, Oxford.

5. Lewin, A. Y. & Volberda, H. W. (2003). The future of organization studies: Beyond the selection-adaptation debate. In H. Tsoukas & C. Knudson (Eds.), *The Oxford Handbook of Organization Theory*, (pp.568-595). Oxford University Press: Oxford.

6. Hannan, M. T. & Freeman J. (1989). *Organizational Ecology.* Cambridge, MA: Harvard University Press.

7. Baum, J. A. C. & Singh, J. V. (1994). *Evolutionary Dynamics of Organizations*, New York, NY: Oxford University Press.

8. Baum, J. A. C. & Haveman, H. A. (1997). Love thy neighbor? Differentiation and agglomeration in the Manhattan hotel industry, 1898-1990. *Administrative Science Quarterly*, *42*, 304-338.

9. Greve, H. R. (1996). Patterns of competition: The diffusion of a market position in radio broadcasting. *Administrative Science Quarterly*, *41*, 29-60.

10. Hannan, M. T. & Carroll, G. R. (1992). *Dynamics of Organizational Populations: Density, Competition and Legitimation.* New York, NY: Oxford University Press.

11. Barnett, W. P. (1997). The dynamics of competitive intensity. *Administrative Science Quarterly*, *42*, 128-160.

12. Amburgey, T. L. & Rao, H. (1996). Organizational ecology: Past, present, and future directions. *Academy of Management Journal*, *39*, 1265-1286.

Date   **Institutional Theory**
Class 6

Readings
1. Scott, W.R. (2001). Constructing an Analytic Framework I: Three Pillars of Institutions: In *Institutions and Organizations*, Thousand Oaks, CA: Sage, 47-70.

2. Meyer, J. W. & Rowan, B. (1977). Institutionalized organizations: Formal structure as myth and ceremony. *American Journal of Sociology*, *83*, 340-363.

3. DiMaggio, P. & Powell, W. (1983). The iron cage revisited: Institutional isomorphism and collective rationality in organizational fields. *American Sociological Review*, *48*, 147-160.

4. Greenwood, R & Suddaby, R. (2006). Institutional entrepreneurship in mature fields: The big five accounting firms. *Academy of Management Journal*, 49(1), 27-48.

5. Thornton, P. H. (2002). The rise of the corporation in a craft industry: Conflict and conformity in institutional logics. *Academy of Management Journal*, 45(1), 81-101.

Supplementary Readings
1. Ocasio, W., Loewenstein, J. & Nigam, A. (2015). How streams of communication reproduce and change institutional logics: The role of categories. *Academy of Management Review*, 40(1), 28-48.

2. Helms, W., Oliver, C. & Webb, K. (2012). Antecedents of settlement on a new institutional practice: Negotiation of the ISO 26000 standard on corporate social responsibility. *Academy of Management Journal*, 55(5), 1120-1145.

3. Lawrence, T. B., Leca, B. & Zilber, T. B. (2013). Institutional Work: Current research, New directions and overlooked issues. *Organization Studies*, *34*, 1023-1033.

4. Greenwood, R. et al. (2011). Institutional Complexity and Organizational Responses. *The Academy of Management Annals*, *5*, 317-337.

5. Murray, F. (2010). The oncomouse that roared: Hybrid exchange strategies as a source of distinction at the boundary of overlapping institutions. *American Journal of Sociology*, 116(2), 341-388.

6. Battilana, J., Leca, B. & Boxenbaum, E. (2009). How actors change institutions: Towards an theory of institutional entrepreneurship. *Academy of Management Annals*, *3*, 65-107.

7. Battilana, J. & D'Aunno, T. (2009). Institutional work and the paradox of embedded agency. In T. B. Lawrence, R. Suddaby, & B. Leca (Eds.), *Institutional work: Actors and agency in institutional studies of organizations*. Cambridge, MA: Cambridge University Press.

8. Greenwood, R., Suddaby, R. & Hinings, C. R. (2002). Theorizing change: The role of

professional associations in the transformation of institutionalized fields. *Academy of Management   Journal*, *45*, 58-80.

9.   Hargrave, T. & Van de Ven, A. (2006). A collective action model of institutional innovation. *Academy of Management Review*, *31*, 864-889.

10. Farjourn, M. (2002). The dialectics of institutional development in emerging and turbulent fields: The history of pricing conventions in the on-line database industry. *Academy of Management Journal*, *45*, 348-874.

11. Kraatz, M. S. & Moore, J. H. (2002). Executive migration and institutional change. *Academy of Management Journal*, *45*, 120-143.

12. Barley, S. R. & Tolbert, P. S. (1997). Institutionalization and structuration: Studying the links between action and institution. *Organization Studies*, *18*, 93-117.

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

Additional Suggested Sources

1.   Tracey, P., Phillips, N. & Jarvis, O. (2011). Bridging institutional entrepreneurship and the creation of new organizational forms: A multilevel model. *Organization Science*, 22(1).

2.   Lok, J. (2010). Institutional logics as identity projects. *Academy of Management Journal*, 53(6), 1305-1335.

3.   Dunn, M. B., & Jones, C. (2010). Institutional logics and institutional pluralism: The contestationof care and science logics in medical education, 1967--2005. *Administrative Science Quarterly,* 55(1), 114-149.

4.   Greenwood, R., Oliver, C., Suddaby, R., & Sablin, K. (2008). *The Sage Handbook of Organizational Institutionalism*, Los Angeles: Sage.

5.   Deephouse, D. & Carter, S. (2005). An examination of differences between organizational legitimacyand organizational reputation. *Journal of Management Studies*, *42*, 329-360.

6.   Maguire, S., Hardy, C., & Lawrence, T. B. (2004). Institutional entrepreneurship in emerging fields: HIV/AIDS treatment advocacy in Canada. *Academy of Management Journal*, *47*, 657-679.

7.   Rao, H., Monin, P. & Durard R. (2003). Institutional change in Toque Ville: Nouvelle cuisine as anidentity movement in French gastronomy. *American Journal of Sociology*, *108*, 795-843.

8.   Zilber, T. B. (2002). Institutionalization as an interplay between actions, meanings, and actors: The case of a rape crisis center in Israel. *Academy of Management Journal*, *45*, 234-254.

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13. Hirsch, P. M. & Lounsbury, M. (1997). Ending the family quarrel: Toward a reconciliation of "old" and "new" institutionalisms. *American Behavioral Scientist*, *40*, 406-418.

14. Westphal, J. D., Gulati, R. & Shortell, S. M. (1997). Customization or conformity? An institutional and network perspective on the content and consequences of TQM adoption", *Administrative Science Quarterly*, *42*, 366-394.

15. Dacin, M. T. (1997). Isomorphism in context: The power and prescription of institutional norms. *Academy of Management Journal*, *40*, 46-81.

16. Scott, W. R. & Meyer, J. W. (Eds.) (1994). *Institutional Environments and Organizations*, Thousand Oaks, CA: Sage.

Date
18th   **NO CLASS**

Date   **Social Movement Theory**
Class 7

Readings
1. McCarthy, J. & Zald, M. (1977). Resource Mobilization and Social Movements: A Partial Theory. *American Journal of Sociology*, 82 (6): 1212-1241.

2. Benford, R. & Snow, D. (2000). Framing Processes and Social Movements: An Overview and Assessment. *Annual Review of Sociology*, 26: 611-639.

3. Ashforth, B. & Mael, F. (1989). Social identity theory and the organization. *Academy of Management Review.* 14 (1): 20-39.

4. Davis, G. Morill, C. Rao, H., Soule, S. (2008). Introduction: Social Movements in Organizations and Markets. *Administrative Science Quarterly,* 53: 389-394.

5. Hensmans, Manuel. (2003). "Social movement organizations: A metaphor for strategic actors in institutional fields." *Organization studies.* 24 (3): 355-381.

6. Benford, Robert D. (1997). "An insider's critique of the social movement framing perspective." *Sociological inquiry.* 67 (4): 409-430.

Supplementary Readings
1. Weber, K. & Heinze, K. (2008). Forage of thought: Mobilizing codes in the movement for grass-fed meat and dairy products. *Administrative Science Quarterly*, 53 (3): 529-567.

2. O'Mahony, S. & Behky, B. (2008). Boundary Organizations: Enabling Collaboration among Unexpected Allies. *Administrative Science Quarterly*, 53(3): 422-459.

3. Sine, W. & Hiatt, S. (2008). From the Ground Up: Grassroots Organizations Making Social Change. *Administrative Science Quarterly*, 53 (3): 578-582.

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7. Buechler, Steven M. (1993). Beyond resource mobilization? Emerging trends in social movement theory. *The Sociological Quarterly.* 34 (2): 217-235.

8. Briscoe, F. & Safford, S. (2008). The Nixon-in-China effect: Activism, imitation, and the institutinoalization of contentious practices. *Administrative Science Quarterly*. 53 (3): 460-491.

Additional Suggested Sources
1. King, B (2008). A political mediation model of corporate response to social movement

activism. *Administrative Science Quarterly*. 53 (3): 395-421.

2. King, Marissa D., and Heather A. Haveman. (2008). Antislavery in America: The press, the pulpit, and the rise of antislavery societies. *Administrative Science Quarterly.* 53(3): 492-528.

3. Marshall, A. (2008). From black power to black studies: How a radical social movement became an academic discipline. *Administrative Science Quarterly*. 53 (3): 575-577

4. Sine, W.. & Hiatt, S. (2008). From the ground up: Grassroots organizations making social change. *Administrative Science Quarterly*. 53 (3): 578-582.

5. King, Brayden. (2008). A social movement perspective of stakeholder collective action and influence. *Business & Society.* 47 (1): 21-49.

6. Hambrick, Donald C., and Ming-Jer Chen. (2008). New academic fields as admittance-seeking social movements: The case of strategic management. *Academy of Management Review.* 33 (1)): 32-54.

7. Mueller, Carol M. (1992). Building social movement theory. Frontiers in social movement theory: p. 3-25.

8. Jasper, James M. (2011). Emotions and social movements: Twenty years of theory and research. *Annual review of sociology.* 37: 285-303.

9. Davis, Gerald F., and Mayer N. Zald. (2005). Social change, social theory, and the convergence of movements and organizations. Social movements and organization theory. 335: 350.

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11. Carroll, William K., and Robert A. Hackett. (2006). Democratic media activism through the lens of social movement theory. Media, culture & society 28 (1): 83-104.

Date
Class 8

The Context of Competition: Embeddedness and Social Capital

Readings

1. Adler, P. S. & Kwon, S. (2002). Social capital: Prospects for a new concept. *Academy of Management Review*, 27(1), 17-40.

2. Acquaah, M. (2007). Managerial social capital, strategic orientation, and organizational performance in an emerging economy. *Strategic Management Journal*, *28*, 1235-1255.

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embeddedness. *Administrative Science Quarterly*, *42*, 35-67.

Supplementary Readings

1. McKague, K., Zietsma, C. & Oliver, C. (2015). Building the social structure of a market. *Organization Studies*, 36(8), 1063-1093.

2. Kwon, S. & Adler, P. S. (2014). Social capital: Maturation of a field of research. *Academy of Management Review*, 39(4), 412-422.

3. Davies, I. A. & Ryals, L. J. (2010). The role of social capital in the success of fair trade. *Journal of Business Ethics*, 96, 317-338.

4. Kim, T., Oh, H., & Swaminathan, A. (2006). Framing international network change: A network inertia perspective. *Academy of Management Review*, *31*, 704-720.

5. Inkpen, A. C. & Tsang, E. W. K. (2005). Social capital, networks, and knowledge transfer. *Academy of Management Review*, *30*, 146-165.

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9. Oliver, C. (1997). The institutional embeddedness of economic activity. *Advances in Strategic Management*, Vol. 13, 163-186.

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Additional Suggested Sources

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2. Roscoe, P. (2013). Economic embeddedness and materiality in a financial market setting. *Sociological Review*, *61*, 41-68.

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role of strategic similarity and multimarket contact in competitive de-escalation. *Organization Science*, *7*, 322-341.

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9. Seibert, S. S., Kraimer, M. L. & Liden, R. C. (2001). A social capital theory of career success. *Academy of Management Journal*, *44*, 219-237.

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11. Gimeno, J. & Woo, C.Y. (1996). Economic multiplexity: The structural embeddedness of cooperation in multiple relations of interdependence. In J.A.C. Baum and J. E. Dutton (Eds.), *Advances in Strategic Management*, *13*, (pp. 323-361). Greenwich, CT: JAI Press.

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**Date
Class 9**   **Interorganizational Relations**

Readings
1. Luo, Y. (2008). Structuring interorganizational cooperation: The role of economic integration in strategic alliances. *Strategic Management Journal*, *29*, 617-637.

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3. Provan, K. G. & Milward, H. B. (1995). A preliminary theory of interorganizational network effectiveness: A comparative study of four community mental health systems. *Administrative Science Quarterly*, *40*, 1-33.

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Supplementary Readings
1. Wang, D. (2015). Activating Cross-border Brokerage: Interorganizational knowledge transfer through skilled return migration. *Administrative Science Quarterly*, 60(1),

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10. Oliver, A. L. & Ebers, M. (1998). Networking network studies: An analysis of conceptual configurations in the study of inter-organizational relationships. *Organization Studies*, *19*, 549-583.

11. Auster, E. (1994). Macro and strategic perspectives on interorganizational linkages: A comparative analysis and review with suggestions for reorientation. In P. Shrivastava, A.S. Huff & J.E. Dutton (Eds.), *Advances in Strategic management*, Vol. 10B, (pp. 3-40) Greenwich, CT: JAI Press.

12. Ring, P. S. & Van de Ven, A. (1992). Structuring cooperative relationships between organizations. *Strategic Management Journal*, *13*, 483-498.

Additional Suggested Sources

1. Reuer, J. J., Klijn, E. & Liokas, C.S. (2014). Board involvement in international joint ventures. *Strategic Management Journal*, 35(11), 1626-1644.

2. McEvily, B. & Marcus, A. (2005). Embedded ties and the acquisition of competitive capabilities. *Strategic Management Journal*, *26*, 1033-1055.

3. Powell, W. W., White, D. R., Koput, K. W., & Owen-Smith, J. (2005). Network dynamics and field evolution: The growth of interorganizational collaboration in the life

sciences. *American Journal of Sociology, 110,* 1132-1205*.*

4. Ebers, M. (1999). The Dynamics of interorganization relationships. *Research in the Sociology of Organizations*, *16*, 31-56.

5. Koza, M. P. & Lewin, A. Y. (1998). Organization Science Special Issue: Managing Partnerships and Strategic Alliance. *Organization Science*, 9(3).

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7. Kenis, P. & Knoke, D. (2002). How organizational field networks shape interorganizational tie-formation rates. *Academy of Management Review*, *27*, 275-293.

8. Park, S. H., & Ungson, G. R. (1997). The effect of national culture, organizational complementarity, and economic motivation on joint venture dissolution. *Academy of Management Journal*, *40*, 279-307.

9. Jones, C., Hesterley, W. S., & Borgatti, S. P. (1997). A general theory of network governance: Exchange conditions and social mechanisms. *Academy of Management Review*, *22*, 911-945.

10. Goes, J. B. & Park, S. H. (1997). Interorganizational links and innovation: The case of hospital services. *Academy of Management Journal*, *40*, 673-696.

Date **Class 10**	**Macro Perspectives on Organizational Culture, Learning and Identity**

Readings

1. Ravasi, D. & Schultz, M. (2006). Responding to organizational identity threats: Exploring the role of organizational culture. *Academy of Management Journal*, 49(3), 433-458.

2. Dutton, J. E. & Dukerich, J. M. (1991). Keeping an eye on the mirror: Image and identity in organizational adaptation. *Academy of Management Journal*, 34(3), 517-554.

3. Crossan, M. M. & Berdrow, I. (2003). Organizational learning and strategic renewal. *Strategic Management Journal*, 24(11), 1087-1105.

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5. Davis, Gerald F., and Tracy A. Thompson. "A social movement perspective on corporate control." *Administrative Science Quarterly* (1994): 141-173.

Supplementary Readings

1. Giorgi, S., Lockwood, C., & Glynn, M. A. (2015). The many faces of culture: Making

sense of 30 years of research on culture in organization studies. *The Academy of Management Annals*, 9(1), 1-54.

2.   Maclean, T. & Webber, S. (2015). Navigating multiple identities across multiple boundaries: A cross-level model of organizational identification. *Journal of Management* Inquiry, 24(2), 156-173.

3.   Gioia, D. A., Patvardhan, S., Hamilton, A. L. & Corley, K. G. (2013). Organizational identity formation and change. *Academy of Management Annals*, 7(1), 123-193.

4.   Rerup, C. & Feldman, M. S. (2011). Routines as a source of change in organizational schemata: The role of trial-and-error learning. *Academy of Management Journal*, 54(3), 577-610.

5.   Ibarra, H., & Barbulescu, R. (2010). Identity as narrative: prevalence, effectiveness, and consequences of narrative identity work in macro role transitions. *Academy of Management Review*, 35(1), 135-154.

6.   Tan, J. & Tan, D. (2005). Environment-strategy co-evolution and co-alignment: A staged model of Chinese SOEs under transition. *Strategic Management Journal*, *26*, 141-157.

7.   He, Z. & Wong, P. (2004). Exploration vs. exploitation: An empirical test of the ambidexterity hypothesis. *Organization Science*, *15*, 481-494.

8.   Haleblian, J., Kim, J., & Rajagopalan, N. (2006). The influence of acquisition experience and performance on acquisition behaviour: Evidence from the U.S. commercial banking industry. *Academy of Management Journal*, *49*, 257-270.

9. Sorenson, J. B. (2002). The strength of corporate culture on the reliability of firm performance. *Administrative Science Quarterly*, *47*, 70-91.

10. Miner, A. S., Kim, J. Y., Holzinger, I. W. & Haunschild, O. (1999). Fruits of Failure: Organization Failure and Population Level Learning. *Advances in Strategic Management*, Vol. 16, 187-220.

11. Miner, A. S. & Mezias, J. (1996). Ugly duckling no more: Pasts and futures of organizational learning research. *Organization Science*, *7*, 88-99.

12. Brickson, S. L. (2005). Organizational identity orientation: Forging a link between organizational identity and organizations' relations with stakeholders. *Administrative Science Quarterly*, *50*, 576-609.

13. Gioia, D. A., Schultz, M. & Corley, K. G. (2000). Organizational identity, image, and adaptive instability. *Academy of Management Review*, *25*, 63-81.

14. Gioia, D. A. & Thomas, J. B. (1996). Identity, image, and issue interpretation: Sensemaking during strategic change in academia. *Administrative Science Quarterly*, *41*, 370-403.

15. Weick, K. E. & Roberts, K. H. (1993). Collective mind in organization: Heedful interrelating on flight decks. *Administrative Science Quarterly*, *38*, 357-381.

16. Haunschild, P. R. & Sullivan, B. N. (2002). Learning from complexity: Effects of prior accidents and incidents on airlines' learning. *Administrative Science Quarterly*, *47*, 609-643.

17. Hatch, M. J. (1993). The dynamics of organizational culture. *Academy of Management Review*, *18*, 657-693.

Additional Suggested Sources

1. Li, J., Qian, C., & Yao, F. K. (2015). Confidence in learning: Inter- and intraorganizational learning in foreign market entry decisions. *Strategic Management Journal*, 36(6), 918-929.

2. Gendron, Y., & Spira, L. F. (2010). Identity narratives under threat: A study of former members of Arthur Andersen. *Accounting, Organizations & Society*, 35(3), 275-300.

3. Lave, D. & Rosenhopf, L. (2006). Balancing exploration and exploitation in alliance formation. *Academy of Management Journal*, *49*, 797-818.

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5. McGrath, R. G. (2001). Exploratory learning, innovative capacity, and managerial oversight. *Academy of Management Journal*, *44*, 118-131.

6. Zollo, M. & Winter, S. G. (2002). Deliberate learning and the evolution of dynamic capabilities. *Organization Science*, *13*, 339-353.

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8. Whetten, D. A. & Godfrey, P. C. (1998). *Identity in Organizations*, Thousand Oaks, CA: Sage.

9. Frost, P. J. et al. (1985). *Reframing Organizational Culture*, London: Sage.

10. Baum, J. A. C., Li, S. X., & Usher, J. (2000). Making the next move: How experiential and vicarions learning shape the locations of chains' acquisitions. *Administrative Science Quarterly*, *45*, 766-801.

11. Elsbach, K. D. & Kramer, R. M. (1996). Members' responses to organizational identity threats: Encountering and countering the 'Business Week' rankings. *Administrative Science Quarterly*, *41*, 442-476.

12. Schein, E. H. (1996). Culture: The missing concept in organization studies. *Administrative Science Quarterly*, *41*, 229-240.

13. March, J. (1991). Exploration and exploitation in organizational learning. *Organization Science,* 2, 71-88.

14. Levinthal, D. & March, J. G. (1993). Myopia of learning. *Strategic Management Journal*, *14*, 95-112.

15. Huber, G. (1991). Organizational learning: The contributing processes and the literatures. *Organization Science*, *2*, 88-115.

16. Levitt, B. & March, J. (1988). Organizational learning. *Annual Review of Sociology*, *14*, 319-340.

17. Miner, A. S. & Haunschild, P. R. (1995). Population-level learning. In B. M. Staw & L. L. Cummings (Eds.), *Research in Organizational Behavior*, 17, (pp. 115-166). Greenwich, CT: JAI Press.

18. Gioia, D. A. & Thomas, J. B. (1996). Identity, image and issue interpretation: Sense making during strategic chance in academia. *Administrative Science Quarterly*, *41*, 370-403.

19. Whetten, D. & Mackey, A. (2002). A social actor conception of organizational identity and its implications for the study of organizational reputation. *Business and Society*, *41*, 393-414.

20. Dukerich, J., Golden, B. R., & Shortell, S. M. (2002). Beauty is in the eye of the beholder: The impact of organizational identification, identity and image on the cooperative behaviours of physicians. *Administrative Science Quarterly*, *47*, 507-533.

21. Ashkanasy, N., Wilderom, C., & Peterson, M. (Eds.) (2000). *The Handbook of Organizational Culture and Climate*, Thousand Oaks, CA: Sage.

22. Martin, J. (2002). *Organizational Culture: Mapping The Terrain*, Thousand Oaks, CA: Sage.

23. Golden-Biddle, K., & Rao, H. (1997). Breaches in the boardroom: Organizational identity and conflicts of commitment in a nonprofit organization. *Organization Science*, *8*, 593-623.

Date Class 11	**Corporate Social Responsibility and Corporate Sustainability**

Readings

1. Donaldson, J., & Preston, L. (1995). The Stakeholder Theory of the Corporation. *Academy of Management Review*, 20: 65-91.

2. Campbell, John L. (2007). Why would corporations behave in socially responsible ways? An institutional theory of corporate social responsibility. *Academy of Management Review* 32 (3): 946-967.

3. Matten, Dirk, and Jeremy Moon. (2008) "Implicit" and "explicit" CSR: A conceptual framework for a comparative understanding of corporate social responsibility. *Academy of Management Review* 33 (2): 404-424.

4. Mitchell, Ronald K., Bradley R. Agle, and Donna J. Wood. (1997). Toward a theory of stakeholder identification and salience: Defining the principle of who and what really counts. *Academy of Management Review* 22 (4): 853-886.

5. Salimath, Manjula S., and Raymond Jones III. (2011). Population ecology theory: implications for sustainability. *Management Decision* 49 (6): 874-910.

6. Den Hond, F. & De Bakker, F. (2007). Ideologically motivated activism: How activist groups influence corporate social change activities. *Academy of Management Review.* 32 (3) 901-924.

Supplementary Readings

1. Jennings, P. D., & Zandbergen, P. A. (1995). Ecologically Sustainable Organizations. *Academy of Management Review*, 20 (4): 1015-1052.

2. McWilliams, Abagail, and Donald Siegel. (2001). Corporate social responsibility: A theory of the firm perspective. *Academy of Management Review* 26 (1): 117-127.

3. Brammer, Stephen, Gregory Jackson, and Dirk Matten (2012). Corporate social responsibility and institutional theory: New perspectives on private governance. *Socio-Economic Review* 10 (1): 3-28.

4. McDonnell, Mary-Hunter, and Brayden King (2013). Keeping up appearances: Reputational threat and impression management after social movement boycotts. *Administrative Science Quarterly* 58 (3): 387-419.

5. Jamali, Dima. (2008). A stakeholder approach to corporate social responsibility: A fresh perspective into theory and practice. *Journal of business ethics* 82 (1): 213-231.

6. Wood, Donna J. (1991). Corporate social performance revisited. *Academy of Management Review* 16 (4): 691-718.

7. Hahn, Tobias, et al. (2014). Cognitive frames in corporate sustainability: Managerial sensemaking with paradoxical and business case frames. *Academy of Management Review* 39 (4): 463-487.

8. Gladwin, Thomas N., James J. Kennelly, and Tara-Shelomith Krause. (1995). Shifting paradigms for sustainable development: Implications for management theory and research. *Academy of management Review* 20 (4): 874-907.

9. Slawinski, Natalie, and Pratima Bansal. (2015). Short on time: Intertemporal tensions in business sustainability. *Organization Science* 26 (2): 531-549.

10. Marquis, Christopher, Mary Ann Glynn, and Gerald F. Davis. (2007). Community isomorphism and corporate social action." *Academy of Management Review* 32 (3): 925-945

11. Delmas, Magali, and Michael W. Toffel. (2004). Stakeholders and environmental management practices: an institutional framework. *Business strategy and the Environment* 13 (4): 209-222.

Additional Suggested Sources

1. Davis, Keith. (1973) The case for and against business assumption of social responsibilities. *Academy of Management Journal* 16(2): 312-322.

2. Hart, Stuart L. (1995). A natural-resource-based view of the firm. *Academy of ManagementRreview* 20 (4): 986-1014.

3. Scherer, Andreas Georg, and Guido Palazzo. (2011). The new political role of business in a globalized world: A review of a new perspective on CSR and its implications for the firm, governance, and democracy. *Journal of Management Studies* 48 (4): 899-931.

4. Rowley, Timothy I., and Mihnea Moldoveanu. (2003). When will stakeholder groups act? An interest-and identity-based model of stakeholder group mobilization. *Academy of Management Review* 28 (2): 204-219.

5. Aguilera, Ruth V., et al. (2007). Putting the S back in corporate social responsibility: A multilevel theory of social change in organizations. *Academy of Management Review* 32 (3): 836-863.

6. De Bakker, Frank GA, et al. (2013) Social movements, civil society and corporations: Taking stock and looking ahead. *Organization Studies* 34 (5-6): 573-593

7. King, Brayden. (2008). A social movement perspective of stakeholder collective action and influence."*Business & Society* 47(1): 21-49.

Date Class 12	**Course Wrap-Up**
	Student Presentations

Paper & Presentation: Descriptions

Due Date

Date Class 7	**Proposed Paper Topic**
	Students will advise me verbally or in writing of their proposed paper topic and the journal to which the paper is potentially targeted by the seventh week of class.

Date Class 12	**Presentation** *Value: 20%*
	In the last class, students will make a presentation of the rough draft of their paper for the course. The presentation style will follow a conference presentation format to permit feedback on how to present at academic conferences.

Due Date

Date	Paper
2 weeks after	*Value: 80%*
Class 12	The completed paper is due two weeks after the last class, and should be in a "journal-ready" format (no typos please). Based on feedback on the paper, students will have four weeks from the date of receipt of feedback to submit a revised paper. The grade for the paper will be based on the revised version.

Evaluation of Written Assignments/Projects

Student grades will be based on the quality of the submitted paper and presentation. Presentations will be based on the first draft of the paper.   Criteria for their assessment will be how closely they follow a presentation that a student would be expected to give at an academic conference.   The paper will be based on the novelty of the paper's proposed contribution, the eloquence and clarity of the writing, the logic of the academic arguments, and the capacity to adhere to the criteria of writing academic papers that is circulated in the first class.

Calculation of Course Grade

In this class, final course grades will be determined by the following process:

Grades	A+	A	A-	B+	B	B-	C+	C	C-	F
Grade Points	9	8	7	6	5	4	3	2	1	0

General Academic Policies: Grading, Academic Honesty and Accommodations

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor.

For more details on the index, grading policy, and grade point average (GPA) requirements, see the Student Handbook or the Student Services & International Relations website:

http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Enrolment+Grades+and+Convocation!OpenDocument#tabs-2

Academic honesty is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found in the Student Handbook and on the Student Services & International Relations website:

http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Academic+Honesty!OpenDocument

Accommodations. For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services.
For counseling & disability services, contact Student Services or see http://www.yorku.ca/cds/.

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Geoffrey Kistruck, Area Coordinator, Sustainability
Date: April 18, 2023
Re: Course rubric change for SGMT 7050

Motion: That Faculty Council approve the change in rubric of SGMT 7050 – Business, Society and Global Governance to SUST 7050 – Business, Society and Global Governance

Rationale: This course was originally approved before the Sustainability Area was created as an SGMT course. The course has a strong connection to topics in sustainability and will form one of the required courses for the new SUST PhD program. It will be an elective course available for all Schulich PhD students.

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich PhD program

2. Responsible Unit:
   Sustainability Area

3. Subject Code (Rubric) and Course Number:
   SGMT 7050

4. Credit Value:
   3.0 credit course

5. Long Course Title:
   Business, Society and Global Governance

6. Short Course Title:
   Business, Society and Global Governance

7. Type of Course Change(s) (indicate all that apply):

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

V. July 2021

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

9. **Rationale:**
This course was originally approved before the Sustainability Area was created as an SGMT course. The course has a strong connection to topics in sustainability and will form one of the required courses for the new SUST PhD program. It will be an elective course available for all Schulich PhD students.

10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title	**Title**

Current:
 ~~Current Course Rubric/Number: SGMT 7050 3.0~~
    Title: Business, Society and Global Governance
 Calendar Description: The course offers students the opportunity to gain an in-depth understanding of the rich scholarly research in business and society, with a particular emphasis on its relationship to global governance. Students will develop insights into how one can make a theoretical, methodological, and practical contribution to the management literature through business, society and global governance research.
	Proposed:
	 New Course Rubric/Number: **SUST** 7050 3.0
	    Title: Business, Society and Global Governance
	
	 Calendar Description: no change

11. Enrolment Notes:
No changes to enrolment from existing requirements

12. Consultation:

Originator:

Geoffrey Kistruck	April 18, 2023
Signature	Date

Geoffrey Kistruck	Sustainability
Name	Area or Specialization

Approvals:

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

Geoffrey Kistruck	April 18, 2023
Signature	Date

Geoffrey Kistruck	Sustainability
Name	Area or Specialization

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

Signature	Date

Peter Darke	PhD Program
Name of Program Director	Program

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

Signature	Date

Name of Committee Chair	Committee

V. July 2021

SCHULICH SCHOOL OF BUSINESS
YORK UNIVERSITY

SUST 7050 BUSINESS, SOCIETY AND GLOBAL GOVERNANCE

Fall 2023
Time: TBA
Room: TBA

Professor: Robert Phillips	**PhD Secretary: Menglin Bai**
Email: rphillips@schulich.yorku.ca	**Office: G324 MB**
Office: SSB G326	**Telephone: 416-736-5268**
	Email: mbai@schulich.yorku.ca

Aims and objectives

The business and society field is a broad one. It addresses social, ethical, environmental and political dimensions of business, and draws from, and contributes to, a range of theoretical and empirical traditions. This course provides students with the opportunity to gain an in-depth understanding of the richness of scholarly research in business and society. Students taking the course will also develop insights into how one can make a theoretical, methodological, and practical contribution to the management literature through business and society research. Specifically, by the end of this course you should be able to:

- Understand, recall, and explain core texts in the field of business, society and global governance
- Evaluate and critique research in the field.
- Recognize and contribute to leading edge theory and research in the field.

The course develops students' understanding in three main areas:

(i) **Foundational theories and concepts in business, ethics and society**. Here, students will study core areas such as the purpose of the corporation, theories of corporate social responsibility, stakeholder theory, and global business governance.

(ii) **Research perspectives on business, society, and global governance**. In this part of the course, students will have the opportunity to explore the contributions and challenges of alternative approaches to business and society research such as economic and political perspectives, normative approaches, international comparative research, and psychological perspectives on business and society.

(iii) **Research contexts and issues**. Finally, students will examine research that addresses specific contexts and issues, namely social entrepreneurship, cross-sector partnership, and business sustainability and environmental governance.

Course meetings

The course meets once weekly for three hours. I will be present throughout, but on some weeks we will have subject experts from across the Schulich faculty to lead sessions in their areas of expertise. Some of these dates may be subject to change depending on availability.

Session	Topic	Date	Session Leader
1	Introduction to research on business, society, and global governance	TBA	TBA
2	The role and purpose of the corporation and CSR	TBA	TBA
3	Corporate citizenship and political approaches to business, society, and global governance	TBA	TBA
4	Global business governance	TBA	TBA
5	Stakeholder Theory	TBA	TBA
6	Stakeholder Theory	TBA	TBA
No class this week		TBA	
7	Economic approaches to business and society, and the challenges of measuring corporate social performance	TBA	TBA
8	Recent Stakeholder Theory	TBA	TBA
9	Psychological perspectives on business and society, and the challenges of individual-level research	TBA	TBA
10	Sustainability, CSR and Accounting	TBA	TBA
11	Social Entrepreneurship	TBA	TBA
12	Current Questions	TBA	TBA

Course Requirements

1. Participation and class discussion:

Students will be expected to come to class having read the assigned readings and be prepared to discuss them. In addition, students will be assigned as discussion leaders for one or two papers for each session. The discussion of the article should relate the reading to the other readings for the session, evaluate the reading's main strengths and weaknesses, and highlight new directions for future research.

2. Article evaluations

Each week students will be expected to provide one paper summary of a selected reading. The summary should document the main contribution of the reading and suggest three main strengths and three main weaknesses of the article. The summaries should be no more than 4 pages double-spaced.

3. Term paper

Students will write an original and publishable paper based on one of the course topics. The paper may take the form of either a theoretical piece or the front-end of an empirical study. The paper should include a thorough review and critique of the literature up to this point and development of a conceptual framework. The paper should attempt to provide a contribution to the existing literature and propose a novel research idea or conceptual insight. If an empirical study is contemplated, students should review the data sources available for the study of the topic and the methods that will be employed to carry out the study. The length should be 25-30 double-spaced pages. Students should work closely with the instructor to develop their ideas, finding references and any other issues that arise.

Due dates:
    TBA   One-page outline of your paper topic and proposed contribution
    TBA   First draft of the paper
    TBA   Due date for the final, completed paper

Evaluation

Class participation	20%
Article evaluations	20%
Term paper	60%

1. Introduction to research on business, society, and global governance

Required:

Margolis, J. D., & Walsh, J. P. 2003. Misery loves companies: rethinking social
    initiatives by business. *Administrative Science Quarterly*, 48(2): 268-305.
Phillips, R., 2003, *Stakeholder Theory and Organizational Ethics*, San Francisco: Berrett-
    Koehler Publishers.
Putnam, H., 2002. *The Collapse of the Fact/Value Dichotomy and Other Essays*. Harvard
    University Press. Chapter 3.

Optional

Barnett, M.L., 2007. Stakeholder influence capacity and the variability of financial
    returns to corporate social responsibility. *Academy of Management Review*, *32*(3),
    pp. 794-816.
Scherer, A. G., & Palazzo, G. 2011. The new political role of business in a globalized
    world – a review of a new perspective on CSR and its implications for the firm,
    governance, and democracy. *Journal of Management Studies*, 48(4): 899-931.
Scherer, A. G., & Palazzo, G. 2007. Toward a political conception of corporate
    responsibility: business and society seen from a Habermasian perspective.
    Academy of Management Review, 32(4): 1096-1120.
Walsh, J. P., Weber, K., & Margolis, J. D. 2003. Social issues and management: Our lost
    cause found. *Journal of Management*, 29(6): 859-881.

2. The role and purpose of the corporation

Required:

Ciepley, D., 2013. Beyond public and private: Toward a political theory of the
    corporation. *American Political Science Review*, 107(1), pp. 139-158.
Friedman, M. 1970. The social responsibility of business is to increase its profits, *The
    New York Times Magazine*: 13th September 1970.
Smith, N.C. and Rönnegard, D., 2016. Shareholder primacy, corporate social
    responsibility, and the role of business schools. *Journal of Business
    Ethics*, 134(3), pp. 463-478
Stout, L.A., 2012. *The Shareholder Value Myth: How Putting Shareholders First Harms
    Investors, Corporations, and the Public*. Berrett-Koehler Publishers.

Optional

Bosse, D.A. and Phillips, R.A., 2016. Agency theory and bounded self-interest. *Academy
    of Management Review*, *41*(2), pp. 276-297
Heminway, J.M., 2017. Shareholder Wealth Maximization as a Function of Statutes,
    Decisional Law, and Organic Documents. *Wash. & Lee L. Rev.*, 74: 939.

Stout, L.A. and Blair, M.M., 2017. A team production theory of corporate law.
In *Corporate Governance* (pp. 169-250). Gower.

3. Corporate citizenship and political approaches to business, society, and global governance (Dirk Matten)

<u>Required:</u>

Kaplan, R. (2014). Who has been regulating whom, business or society? The mid-20th-century institutionalization of 'corporate responsibility' in the USA. *Socio-Economic Review*, 13(1), 125-155.

Matten, D., & Crane, A. 2005. Corporate citizenship: towards an extended theoretical conceptualization. *Academy of Management Review*, 30(1): 166-179.

Matten, D. & Moon, J. 2008. "Implicit" and "Explicit" CSR: A conceptual framework for a comparative understanding of corporate social responsibility. *Academy of Management Review,* 33 (2): 404-424.

Moon, J., Crane, A., & Matten, D. 2005. Can corporations be citizens? Corporate citizenship as a metaphor for business participation in society. *Business Ethics Quarterly*, 15(3): 427-451.

Scherer, A. G., Rasche, A., Palazzo, G., & Spicer, A. 2016. Managing for political corporate social responsibility: New challenges and directions for PCSR 2.0. *Journal of Management Studies*, 53(3): 273-298.

<u>Optional</u>

Brammer, S. J., Jackson, G., & Matten, D. 2012. Corporate social responsibility and institutional theory: new perspectives on private governance. *Socio-Economic Review,* 10(1): 3-28.

Djelic, M. L., & Etchanchu, H. (2017). Contextualizing corporate political responsibilities: Neoliberal CSR in historical perspective. Journal of Business Ethics, 142(4), 641-661.

Elms, H., & Phillips, R. 2009. Private security companies and institutional legitimacy: corporate and stakeholder responsibility. *Business Ethics Quarterly*, 19(3): 403–432.

Gerencser, S. 2005. The corporate person and democratic politics. *Political Research Quarterly*, 58(4): 625-635.

Norman, W., & Néron, P.Y. 2008. *Citizenship Inc.* Do we really want businesses to be good corporate citizens? *Business Ethics Quarterly*, 18(1): 1-26.

Tempels, T., Blok, V., & Verweij, M. (2017). Understanding political responsibility in corporate citizenship: towards a shared responsibility for the common good. *Journal of Global Ethics*, 13(1), 90-108.

4. Global business governance (Burkard Eberlein)

<u>Required:</u>

Eberlein, B. 2018. Who fills the Global Governance Gap? Rethinking the Roles of Business and Government in Global Governance, under review.

Eberlein, B., Abbott, K.W., Black, J., Meidinger, E., Wood, S. 2014. 'Transnational business governance interactions: conceptualization and framework for analysis', *Regulation & Governance*, 8(1): 1-21.

Toffel, M. W., Short, J. L. & Ouellet, M. 2015. Codes in context: How states, markets, and civil society shape adherence to global labor standards. *Regulation & Governance*, 9, 205–223.

Vogel, D. 2010. 'The private regulation of global corporate conduct: achievements and limitations', *Business & Society*, 49(1) March, 68-87.

<u>Optional:</u>

Banerjee, S.B. 2010. Governing the global corporation: a critical perspective. *Business Ethics Quarterly*, 20(2), 265-274.

Büthe, T. 2010. Private regulation in the global economy. *Business and Politics,* 12(3), (special issue) introduction and conclusion.

Flohr, A., Rieth, L., Schwindenhammer, S., Wolf, K.W. 2010. *The role of business in global governance: corporations as norm entrepreneurs*. New York: Palgrave, 337; 232-255 (first and last chapter).

Fuchs, Doris. 2007. Business Power in Global Governance. Boulder/London: Lynne Rienner Publishers. Chapter 3: Business as an Actor in Global Governance: 43-70.

Levy, D. L. & Kaplan, R. 2008. 'Corporate social responsibility and theories of global governance' In: Crane, A., McWilliams A., Matten D., Moon J. & Siegel D. S. (Eds.). *The Oxford Handbook of Corporate Social Responsibility*. Oxford; New York, Oxford University Press: 432-451.

Scherer, A. G., Palazzo, G., & Baumann, D. 2006. Global rules and private actors - towards a new role of the TNC in global governance. *Business Ethics Quarterly*, 16(4): 505-532.

5. Stakeholder Theory

<u>Required</u>**:**

Donaldson, T. & Preston, L. E. 1995. The stakeholder theory of the corporation: Concepts, evidence, and implications. *Academy of Management Review*, 20 (1): 65-91.

Mitchell, R. K., Agle, B.R., & Wood, D. J. 1997. Toward a theory of stakeholder identification and salience: Defining the principle of who and what really counts. *Academy of Management Review*, 22 (4): 853-886.

Rowley, T. 1997. Moving beyond dyadic ties: A network theory of stakeholder influences. *Academy of Management Review*, 22: 887-910.

Walsh, J.P., 2005. Book review essay: Taking stock of stakeholder management. *Academy of Management Review*, 426-438.

Elms, H., Johnson-Cramer, M.E., Berman, S.L., 2011. Bounding the world's miseries: Corporate responsibility and Freeman's stakeholder theory. *Stakeholder Theory: Impact and Prospects*, pp. 1-38.

<u>Optional:</u>

Rowley, T.J. and Moldoveanu, M., 2003. When Will Stakeholder Groups Act? An Interest-and Identity-based Model of Stakeholder Group Mobilization. *Academy of Management Review. 28*(2): 204-219

Phillips, R.A., 2010. Ethics and network organizations. *Business Ethics Quarterly*, 20(3): 533-543.

Jones, T.M. and Wicks, A.C. 1999. Convergent stakeholder theory *Academy of Management Review* 24(2): 206-221.

6. Stakeholder Theory

<u>Required</u>

Barney, J.B., 2018. Why resource-based theory's model of profit appropriation must incorporate a stakeholder perspective. *Strategic Management Journal*

Bundy, J., Shropshire, C. and Buchholtz, A.K., 2013. Strategic cognition and issue salience: Toward an explanation of firm responsiveness to stakeholder concerns. *Academy of Management Review*, 38(3), pp. 352-376.

Henisz, W.J., Dorobantu, S. and Nartey, L.J., 2014. Spinning gold: The financial returns to stakeholder engagement. *Strategic Management Journal*, 35(12), pp. 1727-1748.

De Luque, M.S., Washburn, N.T., Waldman, D.A. and House, R.J., 2008. Unrequited profit: How stakeholder and economic values relate to subordinates' perceptions of leadership and firm performance. *Administrative Science Quarterly*, 53(4), pp. 626-654

Jones, T.M., Felps, W. and Bigley, G.A., 2007. Ethical theory and stakeholder-related decisions: The role of stakeholder culture. *Academy of Management Review*, 32(1), pp. 137-155.

<u>Optional:</u>

Berman, S.L., Wicks, A.C., Kotha, S. and Jones, T.M., 1999. Does stakeholder orientation matter? The relationship between stakeholder management models and firm financial performance. *Academy of Management Journal*, 42(5), pp. 488-506.

Bosse, D.A., Phillips, R.A. and Harrison, J.S., 2009. Stakeholders, reciprocity, and firm performance. *Strategic Management Journal*, 30(4), pp. 447-456.

Bridoux, F. and Stoelhorst, J.W., 2016. Stakeholder relationships and social welfare: A behavioral theory of contributions to joint value creation. *Academy of Management Review*, 41(2), pp. 229-251.

Bridoux, F. and Stoelhorst, J.W., 2014. Microfoundations for stakeholder theory: Managing stakeholders with heterogeneous motives. *Strategic Management Journal*, 35(1), pp. 107-125.

Coff, R.W., 1999. When competitive advantage doesn't lead to performance: The resource-based view and stakeholder bargaining power. *Organization science*, 10(2), pp. 119-133.

7. Economic approaches to business and society and the challenges of measuring corporate social performance (Irene Henriques)

<u>Required:</u>

Mahoney, J. T. and Qian, L., 2013. Market frictions as building blocks of an organizational economics approach to strategic management. *Strategic Management Journal* 34 (9): 1019-1041.

Barnett, M., Henriques, I. & Husted, B. W., 2018. Governing the void between stakeholder management and sustainability. *Advances in Strategic Management*, 38:121-143.

Ebrahim, A., & Rangan, V. K. 2014. What Impact? *California Management Review*, 56(3): 118–141.

George, G., Howard-Grenville, J., Joshi, A., & Tihanyi, L. 2016. Understanding and tackling societal grand challenges through management research. *Academy of Management Journal*, 59(6): 1880–1895.

Barnett, M., Henriques, I., Husted, B.W. & Villamizar, F.A. 2019. Beyond good intentions: How much does CSR really help society? Working paper.

8. Recent Research

<u>Required:</u>

Bridoux, F.M. and Vishwanathan, P., 2018. When Do Powerful Stakeholders Give Managers the Latitude to Balance All Stakeholders' Interests? *Business & Society*.

Bundy, J., Vogel, R.M. and Zachary, M.A., 2018. Organization–stakeholder fit: A dynamic theory of cooperation, compromise, and conflict between an organization and its stakeholders. *Strategic Management Journal*, 39(2), pp. 476-501.

Freeman, R.E., Phillips, R. and Sisodia, R., 2018. Tensions in Stakeholder Theory. *Business & Society*.

Harrison, J.S., Barney, J.B., Freeman, R.E., Phillips, R.A., 2019. *Cambridge Handbook of Stakeholder Theory* – Selections tbd.

Jones, T.M., Harrison, J.S. and Felps, W., 2018. How applying instrumental stakeholder theory can provide sustainable competitive advantage. *Academy of Management Review*.

<u>Optional:</u>

Selections from Harrison, et al., *Cambridge Handbook of Stakeholder Theory*

9. Psychological perspectives on business and society, and the challenges of individual-level research (Ruodan Shao)

Required:

Chin, M. K., Hambrick, D. C., & Treviño, L. K. 2013. Political ideologies of CEOs: the influence of executives' values on corporate social responsibility. *Administrative Science Quarterly*, 58(2): 197-232.

Rupp, D. E., & Bell, C. M. 2009. Extending the deontic model of justice. *Business Ethics Quarterly*, 20(1): 89-106.

Sen, S., & Bhattacharya, C. B. 2001. Does doing good always lead to doing better? Consumer reactions to corporate social responsibility. *Journal of Marketing Research*, 38(May): 225-243.

Thorne, L., & Hartwick, J. 2001. The directional effects of discussion on auditors' moral reasoning. *Contemporary Accounting Research*, 18(2): 337-361.

Treviño, L. K., Weaver, G. R., & Reynolds, S. J. 2006. Behavioral ethics in organizations: A review. *Journal of Management*, 32(6): 951-990.

Optional

Rupp, D. E., Shao, R., Thornton, M., & Skarlicki, D.P. (2013). Applicants' and employees' reactions to corporate social responsibility: The moderating effects of first-party justice perceptions and moral identity. *Personnel Psychology, 66,* 895-933.

Hekman, D. R., Aquino, K., Owens, B. P., Mitchell, T. R., Schilpzand, P., & Leavitt, K. 2010. An examination of whether and how racial and gender biases influence customer satisfaction. *Academy of Management Journal*, 53(2): 238-264. [2010 AMJ Best paper award winner]

Welsh, D. & Ordonez, L. 2014. Conscience without cognition: the effects of subconscious priming on ethical behavior. *Academy of Management Journal*, 57(3), 723-742.

10. Sustainability, CSR and Accounting (Charles Cho)

Required

Cho, C.H., Laine, M., Roberts, R.W., and Rodrigue, M. (2015). Organized Hypocrisy, Organizational Façades, and Sustainability Reporting. *Accounting, Organizations and Society*, 40(1), 78-94

Cho, C.H., Laine, M., Roberts, R.W., and Rodrigue, M. (forthcoming). The Frontstage and Backstage of Corporate Sustainability Reporting: Evidence from the Arctic National Wildlife Refuge Bill. *Journal of Business Ethics*.

Dhaliwal, D. S., Li, O. Z., Tsang, A., and Yang, G. Y. 2011. Voluntary Nonfinancial Disclosure and the Cost of Equity Capital: The Initiation of Corporate Social Responsibility Reporting. *The Accounting Review*, 86 (1), 59-100.

Patten, D.M. 2002. The Relation between Environmental Performance and Environmental Disclosure: A Research Note. *Accounting, Organizations and Society*, 27(8), 763-773.

Clarkson, P. M., Li, Y., Richardson, G. D. and Vasvari, F. P., 2008. Revisiting the Relation between Environmental Performance and Environmental Disclosure: An Empirical Analysis. *Accounting, Organizations and Society*, 33(4-5), 303-327.

11. Social entrepreneurship (Geoff Kistruck)

Required

Choi, N. & Majumfar, S. 2014. Social entrepreneurship as an essentially contested concept: Opening a new avenue for systematic future research. *Journal of Business Venturing* 29(3), 363-376.

Dacin, T., Dacin, P., & Tracey, P. 2011. Social entrepreneurship: A critique and future directions. *Organization Science* 22(5), 1203-1213.

McMullen, J. 2011. Delineating the domain of development entrepreneurship: A market based approach to facilitating inclusive economic growth. *Entrepreneurship Theory & Practice* 35(1), 185-193.

Wry, T. & York, J. 2017. An identity-based approach to social enterprise. *Academy of Management Review*, 43(3), 437-460.

Optional

Kistruck, G. M., Beamish, P. W., Qureshi, I., & Sutter, C. J. 2013. Social intermediation in base-of-the-pyramid markets. *Journal of Management Studies*, 50: 31-66.

Miller, T., Grimes, M., & McMullen, J. 2012. Venturing for others with heart and head: How compassion encourages social entrepreneurship. *Academy of Management Review* 37(4): 616-640.

Santos, F. M. (2012). A positive theory of social entrepreneurship. *Journal of Business Ethics,* 111: 335–351.

Zhara, S., Gedajlovic, E., & Neubaum, D. 2009. A typology of social entrepreneurs: Motives, search processes, and ethical challenges. *Journal of Business Venturing* 24: 519-532.

12. New Directions/Student-Selected Papers

<u>Required:</u>

Phillips, R.A., Berman, S.L., Elms, H. and Johnson-Cramer, M.E., 2011. Stakeholder orientation, managerial discretion and nexus rents. *Stakeholder Theory: Impacts and Prospects*, pp. 163-192.

Schrempf-Stirling, J., Palazzo, G. and Phillips, R.A., 2016. Historic corporate social responsibility. *Academy of Management Review*, 41(4), pp. 700-719.

Schulich School of Business
Nominating Slate (2023 – 2024)

Date: May 19, 2023

Table of Contents

Section 1: Committees Based on Area Nominations

Chair of Faculty Council: Cameron Graham

Vice Chair of Faculty Council: Winny Shen

All Committee Mandates can be found at:

https://teachingandlearning.schulich.yorku.ca/academic-administrative-governance/

The committees in this section include:

PhD Program Committee
Masters Programs/Programs Coordinating Committee
BBA/iBBA Program Committee
Master's Admissions Committee
Student Affairs Committee
Committee for Equity and Diversity
Area Affirmative Action Representatives

Ph.D Program Committee

Chair: Program Director	Peter Darke
Secretary:	Stephanie Allen
Faculty Representatives:	
ACTG	Gregory Saxton
FINE	Lilian Ng
MKTG	Nicole Mead
OMIS	Isik Bicer
ORGS	Winny Shen
SGMT	Moshe Farjoun (Jul. 1 - Dec. 31, 2023) Anoop Madhok (Jan. 1 – Jun. 30, 2024)
SUST	Maxim Voronov
Elected Student Members:	
Ph.D. Rep.	TBA
Ex Officio Voting Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Students	Kiridaran Kanagaretnam
Non-Voting Members:	
Executive Director Student Services and International Relations	Lindsay Hillcoat

Masters Programs/Programs Coordinating Committee

Chair: Associate Dean Academic	Kevin Tasa
Secretary:	Beverly Kelbert
Faculty Representatives:	
ACTG	Viswanath Trivedi
ECON	Farrokh Zandi
FINE	Yelena Larkin
MKTG	TBA
OMIS	David Johnston
ORGS	Luke Zhu

SGMT	Willow Sheremata
SUST	Robert Phillips
BBA/iBBA	Farrokh Zandi
Elected Student Members:	
1st yr MBA rep.	TBA
2nd yr MBA rep.	TBA
BBA/iBBA student rep.	TBA
BBA/iBBA student rep.	TBA
Student Rep MAcc	TBA
Student Rep MBAN	TBA
Student Rep MBAt	TBA
Student Rep MFIN	TBA
Student Rep MHIA	TBA
Student Rep MMAI	TBA
Student Rep MMGT	TBA
Student Rep MMKG	TBA
Student Rep MREI	TBA
Student Rep MSCM	TBA
Ex Officio Voting Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Programs	Ashwin Joshi
Associate Dean Students	Kiridaran Kanagaretnam
Chair, Committee for Equity and Community	Luke Zhu
Director BBA/iBBA	Burkard Eberlein
Director MAcc	Viswanath Trivedi
Director MBA	Mike Valente
Director MBAN	Julian Scott Yeomans
Director MBAt	Murat Kristal
Director MFIN	Melanie Cao
Director MHIA	Amin Mawani
Director MMAI	Julian Scott Yeomans
Director MMgt	Luke Zhu
Director MMKG	Grant Packard
Director MREI	Jim Clayton

Director MSCM	David Johnston
Director MBA/JD	Peter Macdonald
Director MBA/MA, MBA/MFA	Kenneth Rogers
Director SCTE	Tom Medcof
Director Global Relations	Theodore Peridis
Faculty E-Learning and EE Leads	Minerva Cernea
eLearning Lead	Ingo Holzinger
Ex Officio Non-Voting Members:	
MGMT 6100 Coordinator	Ingo Holzinger
Student Services Representative	TBA
Director, IST	Brenn Kha
Executive Director, CCD	Hollis Sinker
Executive Director, Alumni Relations	Christina Niederwanger
Director, Academic Affairs	Kathryn Doyle

BBA/iBBA Program Committee

Chair: Program Director	Burkard Eberlein
Secretary:	Nikki Jagdeosingh
Faculty Representatives:	
ACTG	Abu Rahaman
ECON	Perry Sadorsky
FINE	Ming Dong
MKTG	Ajay Sirsi
OMIS	Guangrui (Kayla) Li
ORGS	Brent Lyons
SGMT	Majid Majzoubi
SUST	Burkard Eberlein
Elected Student Members:	
1st yr BBA rep.	TBA
2nd yr BBA rep.	TBA
3rd yr BBA rep.	TBA
4th yr BBA rep.	TBA
iBBA rep.	TBA

Ex Officio Voting Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Students	Kiridaran Kanagaretnam
Assoc. Director, BBA/iBBA	Farrokh Zandi
Chair, Committee for Equity and Community	Luke Zhu
Ex Officio Non-Voting Members:	
Director SCTE	Tom Medcof
Student Services Rep.	Luba Pan
Centre for Career Design Reps.	Minoo Bhutani, Miles Collyer
Director, Academic Affairs	Kathryn Doyle

Master's Admissions Committee

Chair:	Kiridaran Kanagaretnam
Secretary:	Heidi Furcha
Faculty Representatives:	
ACTG	Jeffery Everett
ECON	Fred Lazar
FINE	Ambrus Kesckes
MKTG	Yigang Pan
OMIS	Adam Diamant
ORGS	Ruodan Shao
SGMT	Charles McMillan (Jan. 1 – Jun. 30, 2024)
SUST	Dirk Matten
Ex Officio Voting Members:	
Associate Dean Students	Kiridaran Kanagaretnam
GBC President or member of GBC	TBA
Non-Voting Members:	
Assistant Director of Recruitment and Admissions	Susan Calahan

Student Affairs Committee

Chair	Avis Devine
Vice-Chair	Markus Giesler
Secretary	Elena Maizel
Faculty Representatives:	
ACTG	Sylvia Hsu
ECON	Atipol Bhanich-Supapol
FINE	Pouyan Foroughi
MKTG	Markus Giesler (Vice Chair)
OMIS	Vibhuti Dhingra
OMIS	Raha Imanirad
SGMT	Yuval Deutsch
SUST	Avis Devine (Chair)
Elected Student Members:	
Masters Rep.	TBA
Masters Rep.	TBA
Undergrad Rep.	TBA
Undergrad Rep.	TBA
Ex Officio Voting Members:	
Associate Dean Academic	Kevin Tasa
Ex Officio Non-Voting Members:	
Associate Dean Students	Kiridaran Kanagaretnam
Student Services Representative	TBA

Committee for Equity and Community

Chair	Luke Zhu
Secretary	Nikki Jagdeosingh
Faculty Advisor for Equity and Community	
ACTG	Xijiang Su
ECON	Alexander Coutts
FINE	Kee-Hong Bae
MKTG	TBA

OMIS	Henry Kim
ORGS	Luke Zhu
SGMT	Theodore Peridis
SUST	Charles Cho
Elected Student Members:	
BBA/iBBA	TBA
Masters	TBA
MBA	TBA
EMBA	TBA
PhD	TBA
Ex Officio Non-Voting Member:	
Associate Dean Academic	Kevin Tasa
Office of Strategic Initiatives & Engagement	Yvonne Massop, Jean-Jacques Rousseau
Staff representative from Student Services and International Relations	TBA
Staff representative from Student & Enrolment Services	TBA
Executive Officer	Jillian Yeung Do
Student Representative	TBA
Student Representative	TBA
Student Representative	TBA

Area Affirmative Action Representatives

ACTG	n/a
ECON	n/a
FINE	n/a
MKTG	n/a
ORGS	n/a
OMIS	n/a
SGMT	n/a
SUST	n/a

Section 2: Committees Based on Faculty Survey

Chair of Faculty Council: Cameron Graham

Vice Chair of Faculty Council: Winny Shen

All Committee Mandates can be found at:

https://teachingandlearning.schulich.yorku.ca/academic-administrative-governance/

The committees in this section include:

Kellogg Schulich Executive MBA Program Committee
Research and Library Committee
Tenure and Promotions Committee
Tenure and Promotions Appeals Committee
Nominating Committee
Faculty Service Roles
Senators
Senate Committees

Kellogg-Schulich Executive MBA Program Committee

Chair	Kevin Tasa
Secretary	Ardene Harris
Associate Dean EMBA	Matthias Kipping
Faculty Representatives:	
	Ashley Konson
	Mike Valente
Director EMBA Global Network (Kellogg)	TBA
Assistant Dean EMBA Global Network (Kellogg)	TBA
Assistant Dean EMBA Programs	Su-Lan Tenn
Ex Officio Voting Members:	
Associate Dean Academic	
Student Members:	
1st year EMBA rep.	Umair Anjum
2nd year EMBA rep.	Nejia Ansari

Research and Library Committee

Chair: Assoc. Dean, Research	Eileen Fischer
Secretary:	Farhana Islam
Faculty Representatives:	
	Ruodan Shao
	Ming Dong
	Brent Lyons
Elected Student Members:	
Masters Rep.	TBA
BBA/iBBA Rep.	TBA
Ex Officio Voting Members:	
Bronfman Business Librarian	Angie An
Research Officer	Farhana Islam
Ex Officio Non-Voting Members:	
Director IST	Brenn Kha

Tenure and Promotions Committee

Chair	TBA
Secretary:	Sabine Friedrich
Core Members Continuing:	
	Charles Cho
Acclaimed Members:	
	Brent Lyons, Moshe Milevsky, Eileen Fischer
Ph.D. Rep	TBA
Noncore Members:	
ACTG	n/a
ECON	n/a
FINE	Yisong Tian, Kee-Hong Bae
MKTG	n/a
OMIS	n/a
ORGS	Kiridaran Kanagaretnam, Chris Bell, Luke Zhu
SGMT	Preet Aulakh, Theodoros Peridis
SUST	n/a
Note: Areas that have candidates going forward for T&P should identify non-core members and inform nominating committee.	

Tenure and Promotions Appeals Committee

	Chris Bell
	Fred Lazar
	Yigang Pan

Nominating Committee

Chair	Ashwin Joshi
Secretary	Nikki Jagdeosingh
Faculty Representatives:	

	Divinus Oppong-Tawiah
	Aleksandra Rzeznik
Elected Non-Voting Student Members:	
GBC President	Niyati Choudhary
UBS President	TBA
Ex Officio Members:	
Associate Dean Academic	Kevin Tasa

SSHRC Explore & Exchange Grants

1 Schulich Faculty (2-year term)	Moren Lévesque (Jun. 30, 2025)

Faculty Service Roles

Schulich Behavioral Research Lab	Nicole Mead
Affirmative Action Coordinator	Ashwin Joshi
YUFA Stewards	Jeff Everett Markus Biehl

Senators

6 Faculty including the Dean	Kevin Tasa (June 2025)
	Markus Biehl (June 2025)
	Dirk Matten (June 2025)
	Mike Valente (June 2026)
	Preet Aulakh (June 2026)
Ex Officio	Detlev Zwick
Student Senators:	
Graduate Student rep.	TBA
Undergraduate Student rep.	TBA

Senate Committees:

(* = designated Schulich slots)

Academic Policy, Planning & Research (APPRC)*	Burkard Eberlein (June 2024)

HPRC (subcommittee of APPRC)	Brent Lyons (June 2025)
Tenure & Promotions	Russell Belk (June 2025)
Executive*	Kevin Tasa (June 2025)
Sub-Committee on Honorary Degrees*	Matthias Kipping (June 2024)
Academic Standards, Curriculum and Pedagogy (ASCP)	Fred Lazar (June 2026)

Section 3: Administrative Committees and Roles

Chair of Faculty Council: Cameron Graham

Vice Chair of Faculty Council: Winny Shen

All Committee Mandates can be found at:

https://teachingandlearning.schulich.yorku.ca/academic-administrative-governance/

These committees and roles in this section are constituted by decanal authority. The slate reflects the public announcements from the Dean's office. As and when new announcements are made, the slate will be modified.

Executive Committee
Operating Committee
Management Committee
Faculty of Graduate Studies
Other Schulich Academic Administrative Roles
Other University Administrative Roles

Executive Committee

Chair:	Cameron Graham
Secretary	Kathryn Doyle
Ex Officio Voting Members:	
Dean	Detlev Zwick
Vice-Chair Faculty Council	Winny Shen
Associate Dean Academic	Kevin Tasa
Associate Dean Programs	Ashwin Joshi
Associate Dean Research	Eileen Fischer
Associate Dean Students	Kiridaran Kanagaretnam
Associate Dean External Relations	Theodore Noseworthy
Associate Dean EMBA	Matthias Kipping
Executive Officer	Jillian Yeung Do
Chairs of Faculty Council Standing Committees:	
Masters Admissions	Kiridaran Kanagaretnam
Research and Library	Eileen Fischer
Nominating Committee	Ashwin Joshi
Student Affairs	Avis Devine
Tenure and Promotion	TBA
Equity and Community	Luke Zhu
BBA/iBBA Program Committee	Burkard Eberlein
EMBA Program Committee	Kevin Tasa
PhD Program Committee	Peter Darke
Masters Programs/Programs Coordinating Committee	Kevin Tasa
Program Directors:	
BBA/iBBA	Burkard Eberlein
MBA	Mike Valente
EMBA	Matthias Kipping
PhD	Peter Darke
MAcc	Viswanath Trivedi
MSCM	David Johnston
MMkg	Grant Packard

MF	Melanie Cao
MREI	Jim Clayton
MMgt	Luke Zhu
MBAN	Julian Scott Yeomans
MBAt	Murat Kristal
MHIA	Amin Mawani
MMAI	Julian Scott Yeomans
GBC President	Niyati Choudhary
UBS President	TBA
PhD President	TBA

Operating Committee

Chair:	Dean Detlev Zwick
Secretary	Jaime Naperi
Ex Officio Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Programs	Ashwin Joshi
Associate Dean Research	Eileen Fischer
Associate Dean Students	Kiridaran Kanagaretnam
Associate Dean External Relations	Theodore Noseworthy
Executive Officer	Jillian Yeung Do
Director, Office of Strategic Initiatives & Engagement	Yvonne Massop
Program Directors:	
BBA/iBBA	Burkard Eberlein
MBA	Mike Valente
EMBA	Matthias Kipping
PhD	Peter Darke
MREI	Jim Clayton
Area Coordinators:	
ACTG	Linda Thorne
ECON	Irene Henriques
FINE	Pauline Shum Nolan
MKTG	David Rice
OMIS	Henry Kim

ORGS	Ruodan Shao
SGMT	Willow Sheremata
SUST	Geoffrey Kistruck

Management Committee

Chair:	Dean Detlev Zwick
Secretary	Jaime Naperi
Ex Officio Members:	
Associate Dean Academic	Kevin Tasa
Associate Dean Programs	Ashwin Joshi
Associate Dean Research	Eileen Fischer
Associate Dean Students	Kiridaran Kanagaretnam
Associate Dean External Relations	Theodore Noseworthy
Executive Officer	Jillian Yeung Do
Executive Director, SSIR	Lindsay Hillcoat
Executive Director, CCD	Hollis Sinker
Executive Director, SEEC	Rami Mayer
Executive Director, AAE	Christina Niederwanger
Director, IST	Brenn Kha
Director, OSIE	Yvonne Massop

Faculty Of Graduate Studies Council

Ex Officio	Dean Detlev Zwick
Program Directors and Representatives:	
Associate Dean Academic	Kevin Tasa
Associate Dean Programs	Ashwin Joshi
Ph.D.	Peter Darke
EMBA	Matthias Kipping
MAcc	Viswanath Trivedi
MBA	Mike Valente
MBAN	Julian Scott Yeomans
MBAt	Murat Kristal
MFIN	Melanie Cao
MHIA	Amin Mawani
MMKG	Grant Packard

MMgt	Luke Zhu
MMAI	Julian Scott Yeomans
MSCM	David Johnston
MREI	Jim Clayton
Diploma Directors:	
Advanced Accounting	Viswanath Trivedi
Art, Media & Entertainment Management	Kenneth Rogers
Business and the Environment	Geoffrey Kistruck
Communication, Culture & Leadership	Ashwin Joshi
Financial Engineering (Concurrent and Stand Alone)	Melanie Cao
Health Industry Management	Joseph Mapa
Nonprofit Management and Leadership	Geoffrey Kistruck
Post-MBA Diploma in Advanced Management	Mike Valente
Student Representatives:	
PhD	TBA
EMBA	TBA
IMBA	TBA
MBA	TBA
MBAN	TBA
MBAt	TBA
MAcc	TBA
MFIN	TBA
MHIA	TBA
MMAI	TBA
MMGT	TBA
MMKG	TBA
MREI	TBA
MSCM	TBA
GBC President	Niyati Choudhary

Schulich Academic Administrators

Associate Deans:	
Associate Dean Academic	Kevin Tasa
Associate Dean Programs	Ashwin Joshi
Associate Dean Students	Kiridaran Kanagaretnam
Associate Dean Research	Eileen Fischer
Associate Dean External Relations	Theodore Noseworthy
Associate Dean EMBA	Matthias Kipping
Program Directors:	
BBA/iBBA	Burkard Eberlein
EMBA	Matthias Kipping
MBA	Mike Valente
MAcc	Viswanath Trivedi
MBAN	Julian Scott Yeomans
MBAt	Murat Kristal
MMKG	Grant Packard
MFIN	Melanie Cao
MHIA	Amin Mawani
MMAI	Julian Scott Yeomans
MMgt	Luke Zhu
MREI	Jim Clayton
MSCM	David Johnston
PhD	Peter Darke
Diploma Directors: (source: ADA Office, website to be updated)	
Advanced Accounting	Viswanath Trivedi
Art, Media & Entertainment Management	Kenneth Rogers
Business and the Environment	Geoffrey Kistruck
Communication, Culture & Leadership	Ashwin Joshi
Financial Engineering (Concurrent and Stand Alone)	Melanie Cao

Health Industry Management	Joseph Mapa
Nonprofit Management and Leadership	Geoffrey Kistruck
Post-MBA Diploma in Advanced Management	Mike Valente
Specialization Directors: (source: [Graduate Academic Handbook](#) and [Undergraduate Academic handbook](#))	
Accounting	Linda Thorne
Arts, Media & Entertainment Management	Kenneth Rogers
Business & Sustainability	Geoffrey Kistruck
Business Consulting	TBA
Digital Transformation	TBA
Leading Equitable, Diverse, and Inclusive Organizations	Ruodan Shao
Economics	Irene Henriques
Entrepreneurial Studies	Moren Lévesque, Chris Carder
Entrepreneurial & Family Business Studies	Moren Lévesque, Chris Carder
Finance	Pauline Shum Nolan
Global Metals and Minerals Management	Richard Ross
Global Retail Management	Markus Giesler
Health Industry Management	Joseph Mapa
International Business	Farrokh Zandi
Marketing	David Rice
Operations Management & Information Systems	TBA
Organization Studies	Ruodan Shao
Real Property	Jim Clayton
Responsible Business	Geoffrey Kistruck
Strategic Management	Willow Sheremata
Certificate Directors:	

Certificate in International Management (CIM)	Bernie Wolf
Area Coordinators:	
ACTG	Linda Thorne
ECON	Irene Henriques
FINE	Pauline Shum Nolan
MKTG	David Rice
ORGS	Ruodan Shao
OMIS	Henry Kim
SGMT	Willow Sheremata
SUST	Geoffrey Kistruck
Other Schulich Administrative Roles: (source: Dean's Office)	
Academic Director, Centre for Innovation and Teaching Excellence (CITE)	Tom Medcof
Senior Advisor, Accreditations	Markus Biehl
MGMT 6100 Coordinator	Ingo Holzinger
Director YCG	Kostas Tsambourlianos
Director Global Relations	Theodore Peridis
Centre for Customer Centricity	Ajay Sirsi
Director, Hennick Centre	Peter Macdonald
Krembil Centre for Health Management and Leadership	Joseph Mapa
George Weston Ltd. Centre for Sustainable Supply Chains	David Johnston
Other University Administrative Roles:	
York University Pension Plan	Pauline Shum Nolan
Executive Director, York Change	Ellen Auster
Joint Sub-Committee on Quality Assurance	Theodoros Peridis

FACULTY COUNCIL
SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Schulich Faculty Council for the 2022-23 academic year
Was held via Zoom on **Friday, April 28** from **11:30 am - 1:00pm**.

AGENDA

1. Welcome and Chair's Remarks

Chair calls the meeting to order at 11:32 am, confirms quorum, and reads the land acknowledgement.

Review of the proposed agenda and consent agenda. Call for nominations to Senate committees.

K.Tasa: as a member of Senate Executive, I was asked to solicit nominations from tenure stream faculty to Senate committees Academic Standards, Curriculum, and Pedagogy which has had no Schulich representation for the last couple of years, and Senate Tenure and Promotions. University-wide, there is difficulty in getting nominations for T&P which affects the efficacy of having our files approved there. These are committees with vacancies that are not necessarily filled by senators.

A.Joshi: the Qualtrix link sent to faculty to assess preferences for committee appointments and ASCP as well as T+P are included there.

2. Dean's Remarks

GBC Gala- almost 300 students and lots of staff and faculty attended. A really fun event. Teaching excellence awards are distributed there- you can see the list of nominees on the website. Strong representation by the Finance area- congratulations. Congratulations to Ashwin and Supinder, the winner and runner-up. A.Joshi donated the award to the Michelle Hughes Memorial Fund.

Thanks to everyone who is involved in the largest alumni event coming up. Congratulations to the recent research excellence fellowship winners—this clearly shows the strength of research across the School. There are quite a few large, impressive grant proposals underway.

The IB presence is going to increase; a funding proposal was approved to start a build across the street from the Nadal campus.

We may want to have an in-depth conversation at an upcoming Council meeting about the widespread implications of the emerging and rapidly changing generative AI technologies.

A.Devine: I was wondering if we could get more information about what the School's percentage is for transfer to central funds as part of the revised SHARP budget model.

No Faculty is currently contributing 8% because none of the Faculties are in a year-over-year surplus right now, so the number is closer to 5% until we get to a surplus. We were back on-track in terms of strategic enrolment from the visa issues some of our students were experiencing last year; however, the IRCC strike will now likely be a factor also. We will have to see how the budget situation evolves over the coming months and year. The projected year-over-year deficit may be smaller; I don't anticipate we will break even quite yet.

M.Kamstra: I understand University of Guelph is in some trouble- they've cut multiple programs. Do you know anything about this?

I don't. But I can tell you that conversations along those lines have not taken place within York. I can't really speak to it; it's news to me. If I hear any updates, I'll bring it back to Faculty Council.

M.Valente: the Ivey investment. Do we know anything else in terms of program planning. Are they trying to capture greater market share or are they projecting growth opportunity?

They are focused on graduate programing for working professionals. It's significant to pay attention to because it's like the Smith presence downtown which is also focused on working professionals. Do we need to think about the accessibility and flexibility of our programs?

F. Kanagaretnam: 5% is on top of the shared services tax on all of our programs, including Exec Ed. So if you think about the overall total, it's not as significant a reduction as from 8% to 5%.

3. **PhD/GBC/UBS Updates**

No rep from PhD.

J.Choong: We have the whole incoming team elected. I invited some of the new VP to join the meeting, but she couldn't make it. She'll be in these meetings in the Fall term. We are working on the transition process now.

UBS- no rep.

A.Joshi: want to commend the GBC for an extraordinary year. They restarted from being fully remote in previous years, developed new procedures. They had the most attended Dean's Cup this year at MacEwen. They did audience polling, so there was an incentive for students to bring their friends and supporters. It's something we should acknowledge—it really elevated the event. It was innovative. Thank you, Janessa and team.

4. **Motion** to approve the creation of three new courses in Sustainability (SUST 6250 3.00; SUST 6450 3.00; SUST 6350 3.00) *(G. Kistruck)*

5. **Open Forum: Group Work Components in Course Work**
   (free rider allegations, integrating peer assessment, best practices for assessment design, academic integrity, [School guideline of cap at 50% per course](#))

   Meeting attendees discussed the following items related to the topic:

   - Group work guideline should be at program level, not course level.
   - Justifications for high group work component should be more robust (e.g., linked to experiential education)
   - Student satisfaction is at stake—students who have difficulty in a group are more likely to respond negatively to ONCE surveys.
   - Peer evaluation component needs to be thought through at pedagogical level
   - Need to train students on how to work in groups
   - Group work is taxing for students – research shows that self-selected groups lead to worse outcomes for students even though students tend to favour the ability to select their own groups. Gender and racial segregation can become an issue when students select their own groups across multiple courses in a program.
   - Most grade appeals are related either to participation grade or group work components. Regarding group work components, students' files often indicate confusion and frustration about not knowing up-front how to access support for free-rider allegations, working through conflict, etc. Some students believe that doing extra work to control the actions of other group members justifies receiving a higher grade for the component (i.e. controlling others is the goal of group work).

6. **Other Business**

   None.

7. **Adjournment**

   The Chair adjourned the meeting at 1 pm.