FACULTY COUNCIL
SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Schulich Faculty Council for the 2023-24 academic year will be held via Zoom on **Friday, April 19, 2024** from **11:30am - 1:00pm**.

AGENDA

1. **Welcome and Chair's Remarks** (5 minutes)
2. **Dean's Remarks** (5 minutes)
3. **PhD/GBC/UBS Updates** (10 minutes)
4. **Discussion on Course Delivery Modes** (60 minutes)
   (See York's Common Language for Modes of Delivery Document)
5. **Other Business** (10 minutes)
6. **Adjournment**

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

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For Information: Senate Synopsis 2024. 02.15	3-4
For Information: Report on York University Academic Scheduling	5-111
1. Master Programs Committee *(K. Tasa)*	
a) **Master of Business Administration** *(M. Valente)*	
i) **Motion:** Course Change Proposal *(retirement of ENTR 6655 3.00) (M. Levesque)*	112-115
ii) **Motion:** New Course Proposal *(OMIS 6620 3.00 Design Thinking) (H. Kim)*	116-137
iii) **Motion**: HIMP Diploma and Specialization Changes *(J. Mapa)*	138-147
iv) **Motion**: MKTG Specialization and Stream Changes *(D. Rice)*	148-154
v) **Motion**: FINE Specialization and Stream Changes *(P. Shum Nolan)*	155-158
vi) **Motion**: AME Diploma and Specialization Changes *(K. Rogers)*	159-266
vii) **Motion**: SGMT 6410 Course Change *(title change to Global Strategy) (W. Sheremata)*	267-270
viii) **Motion**: SGMT Specialization Change *(W. Sheremata)*	271-275
b) **Master of Business Administration in Technology Leadership** (*M. Kristal*)	
i) **Motion:** Course Change Proposals *(change to description MGMT 5190 and MGMT 5290) (M. Cernea)*	276-313
2. BBA/iBBA Committee *(B. Eberlein)*	
a) **Minor Change to Program**	314-318
i) **Motion:** Program Change *(replace MGMT 1030 3.00 with MGMT 1035 3.00)*	

ii) **Motion**: Program Change (*replace AP/ECON 1000 and 1010 with SB/ECON 1000 and 1010 in the core; removing ECON 2000*)

iii) **Motion**: Program Change (*reduce core credits from 51 to 48 and increase elective credits from 69 to 72; increase the Schulich elective course credits from 21 to 24*)

b) **Course Change Proposals**

i) **Motion**: FINE 2000 3.00 Introduction to Finance (*addition of delivery mode) (P. Foroughi)* 319-339

ii) **Motion**: ORGS 2100 3.00 Individuals and Groups in Organizations (*addition of delivery mode*) (*R. Shao*) 340-368

iii) **Motion**: ORGS 2200 3.00 Organizations and Their Environments (*addition of delivery mode*) (*R. Shao*) 369-388

iv) **Motion**: MGMT 1000 3.00 Introduction to Business (*addition of delivery mode*) (B. Eberlein) 389-413

v) **Motion:** IBUS 4200 3.00 Integrative International Business Seminar (*calendar description change*) (*B. Wolf*) 414-436

vi) **Motion:** MGMT 1030 3.00 History of Capitalism: Structures, Agents, Artefacts (*course retirement) (P. Aulakh)* 437-441

vii) **Motion:** ECON 2000 3.00 Applied Macroeconomics (*course retirement) (I. Henriques)* 442-445

c) **New Course Proposals**

i) **Motion**: FINE 4280 3.00 Fintech: Digital Transformation of Financial Services (*P. Shum Nolan)* 446-466

ii) **Motion**: SGMT 4530 3.00 International Business Simulation (*W. Sheremata*) 467-493

iii) **Motion**: MGMT 1035 3.00 Global Business: Past, Present, Future (*P. Aulakh*) 494-515

iv) **Motion:** SB/ECON 1000 3.00 Microeconomics for Managers (*I. Henriques*) 516-534

v) **Motion:** SB/ECON 1010 3.00 Macroeconomics for Managers (*I. Henriques*) 535-552

d) **Specialization Change**

i) **For Information**: Strategic Management (*W. Sheremata*) 553-557

3. PhD Committee *(P. Darke)*

a) **Motion:** Program Change Proposal *(updating information on FGS website re: the graduate field in Strategic Management*) 558-564

4.

Minutes of the Last Meeting: 2024.03.08 565-571

The Senate of York University

Meeting Synopsis

The 703rd Meeting of Senate
Held on Thursday, 15 February 2024, via Zoom

Remarks

The Chair, Poonam Puri, welcomed Senators to the 703rd meeting of Senate, and noted that Senator Alison Macpherson would act as Vice-Chair for the meeting.

The President spoke to the challenges posed by the reduction in international study permits and ensuing confusion for applicants, the implications on university enrolment and strategic planning, the necessity for cost reduction and strategic enrolment management, alongside opportunities for innovation in pedagogy and AI initiatives.

Approvals

Senate approved the recommendations of the Executive Committee to:

- amend the Rules of Senate to integrate representation from the Markham campus in the Senate membership and make editorial updates to reflect recent changes in titles of senior administration positions; and
- confirm the membership of Senate for the period 1 July 2024 - 30 June 2026 with a maximum of 169 and allocations by Faculty, with the School of Arts, Media, Performance & Design, the Faculty of Liberal Arts & Professional Studies, the Lassonde School of Engineering and the Faculty of Science, as the anchor Faculties delivering Markham campus programming.

Senate approved the recommendation of the Academic Policy, Planning and Research Committee to recommend to the Board of Governors the establishment of 4 academic units and disestablishment of 14 existing units at Glendon; and relatedly, Senate approved the transfer of the constituent academic programs and curricula from the 14 existing units to the 4 new departments at Glendon, effective 1 September 2024.

Senate approved the recommendations of the Academic Standards, Curriculum and Pedagogy Committee to amend Faculty-wide Regulations at Glendon College applicable to all BA and Honours BA/iBA degree programs to:

- remove major grade point average (GPA) requirements for graduation, effective FW2024; and
- remove the *Failed to Gain Standing Academic Decision* sanction.

York University Senate

Committee Information Items

Executive

The Executive Committee's information items included the following:

- Summary of suggestions, questions and comments raised at the 18 January 2024 special meeting of Senate on the report of the Auditor General of Ontario
- Ruling on a hortative motion submitted for consideration of Senate
- Additions to the pool of prospective honorary degree recipients as recommended by the Honorary Degrees and Ceremonials Sub-Committee

Academic Policy, Planning and Research (APPRC)

APPRC reported on the following items:

- report from the Interim Deputy Provost on FW'24 applications at Markham Campus
- Its preliminary discussion of the report of the *APPRC-ASCP Task Force on the Future of Pedagogy*
- Horizon Europe Research Program

Academic Standards, Curriculum and Pedagogy (ASCP)

ASCP reported on the following items:

- Minor modifications to degree requirements in programs housed in AMPD, FGS, Health, LA&PS and Lassonde, effective FW 2024
- Status update on the Attending Physician Statement and Academic Conduct policies

Academic Policy, Planning and Research / Academic Standards, Curriculum and Pedagogy

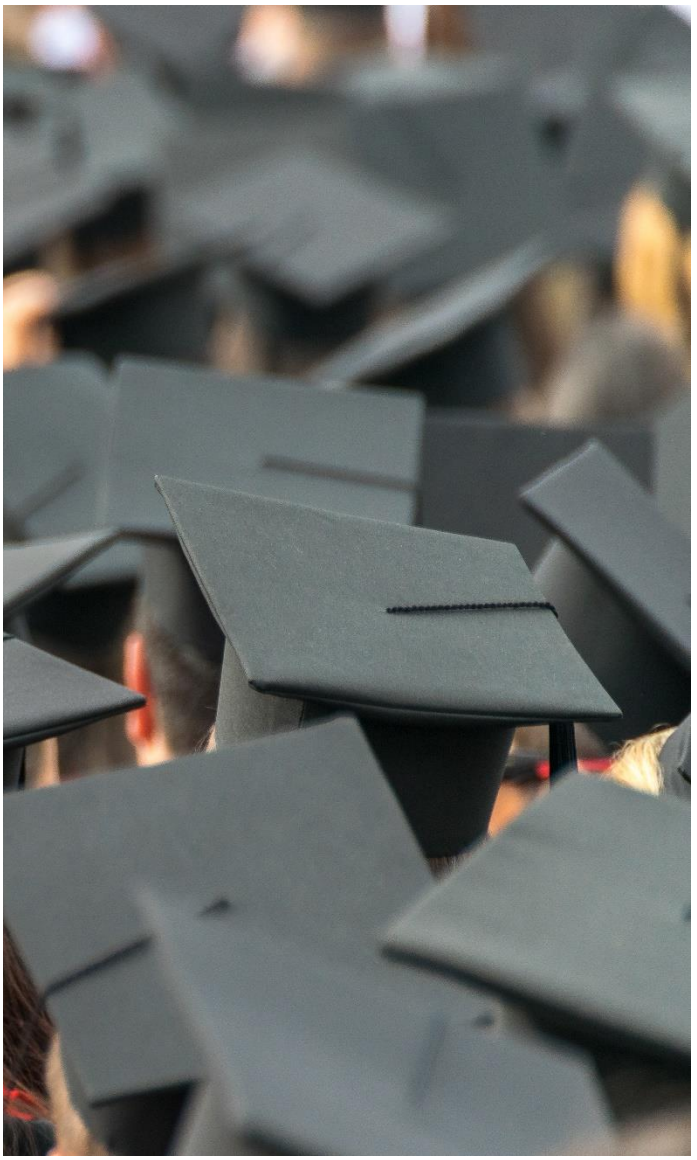
APPRC and ASCP conveyed a report from the *Joint Sub-Committee on Quality Assurance* which included Final Assessment Reports for completed Cyclical Program Reviews and advised of enhancements to process matters.

Additional Information about this Meeting

Please refer to the full Senate agenda and supplementary material posted online with the **15 February 2024** meeting for details about the items reported.

Senate's next meeting will be held at **3:00 pm on Thursday, 28 March 2024.**

York University 2022



Strategic Scheduling Evaluation

Ad Astra

February 13, 2023

York University Final Report

Consultants:
Lisa Hunter, Christine Stewart, Laura Kelley

Introduction

Project Overview

The Academic Scheduling Unit at York University has been advocating for several years for an external, objective review of scheduling practices and processes to ensure that the institution is operating as effectively and efficiently as possible while ensuring student success.

After a competitive procurement process, York University made the decision to partner with Ad Astra to conduct a qualitative and quantitative review of course scheduling processes, policies, procedures, course offerings, and classroom capacity.

The goal is to have this partner, Ad Astra, provide a list of recommendations to York University that will improve the academic scheduling practices and processes to achieve better utilization of space and creates a student-centered academic schedule.

Key Questions

- **Is York utilizing classroom space as effectively and efficiently as possible?**
  - **Are there enough seats and courses to meet student demand?**

The qualitative review or ***Course Scheduling Infrastructure Evaluation*** consisted of the following two components.

1. Course Scheduling Infrastructure Diagnostic Survey
2. Key Stakeholder Focus Groups

The quantitative review or ***Strategic Scheduling Checkup*** consisted of an analysis of the following two components.

1. Course Offerings
2. Classroom Capacity

Methodology

Steering Committee

To begin the project, York identified key stakeholders to serve on a steering committee. The role of the steering committee is to provide input and feedback to Ad Astra consultants throughout the length of the project, as well as serve as campus liaisons for York stakeholders.

The following individuals agreed to serve on the steering committee.

- Frankie Billingsley (Associate Registrar & Director, Student Records & Scheduling)
- Laurie Mobilio (Director, Student Systems)
- Dr. Mike Scheid (Associate Dean, Students, Faculty of Science)
- Dr. Julie Clark (Faculty Member, Natural Sciences, Faculty of Science)
- Dr. Maggie Quirt (Associate Dean, Programs, Faculty of Liberal Arts & Professional Studies)
- Dr. Michael Darroch (Associate Dean, Academic, School of Arts, Media, Performance & Design)
- Dr. Karin Page-Cutrara (Associate Dean, Teaching, Learning & Academic, Faculty of Health)
- Dr. Merv Mosher (Faculty Member, Kinesiology, Faculty of Health)
- Bradley Parkes (Facilities)
- Helen Psathas (Director, Campus Planning)
- Emily Rush (Provost's Office)
- Pam Edgecombe (Director, Strategic Policy & Planning, Lassonde School of Engineering)
- Paul Elliott (Executive Officer, Faculty of Environmental & Urban Change)
- Laura Crane (Director, Academic Affairs & Operations, Faculty of Education)
- Gilles Thibodeau (Director, Academic Services, Glendon)
- Luba Pan (Director, Student & Enrolment Services, Schulich School of Business)
- Karen Willoughby (International & Academic Programs Coordinator, Osgoode Hall Law School)

- Wesley Moir (Associate Director, Graduate Academic Affairs, Faculty of Graduate Studies)
- Carolyn Sebastian (Faculty Assistant, Faculty of Liberal Arts & Professional Studies)
- Cristina Bregar (University Lead, Academic Advising, Office of the University Registrar)
- Mark Conrad (Director, Strategic Intelligence and Predictive Analytics, Office of Institutional Analysis & Planning)

Members of the Steering Committee attended a project kickoff meeting with the Ad Astra consultants, which consisted of a project overview and an opportunity for members to ask questions of the consultants and discuss internal processes. Additionally, two project kickoff meetings, open to all campus members, were held in April 2022.

Project Timeline

The project consisted of the following components:

- Feb 2022-pre- Kickoff
- March 2022- Ad Astra/York- project touchpoints
- April 2022- Project kickoff
    - June/July 2022- Focus Group Meetings
    - June 7th: Deans
    - June 7th: Associate Deans
    - June 10th: Academic Scheduling Team
    - June 13th: Advising Community
    - June 21st: Faculty Members
    - June 27th: Scheduling Leads
    - June 27th: Registrar
    - June 29th: Additional Session for Steering Committee
    - July 7th: Facilities Management
- August 2022- Ad Astra/York- project touchpoint meetings
- Sept 2022- Final review call- small group
- November 2022- Ad Astra/York- project touchpoint meetings
- December 2022: Data review meetings
- January 2023: Ad Astra/York- project touchpoint
- Feb 2023; Final Presentation- Steering Committee

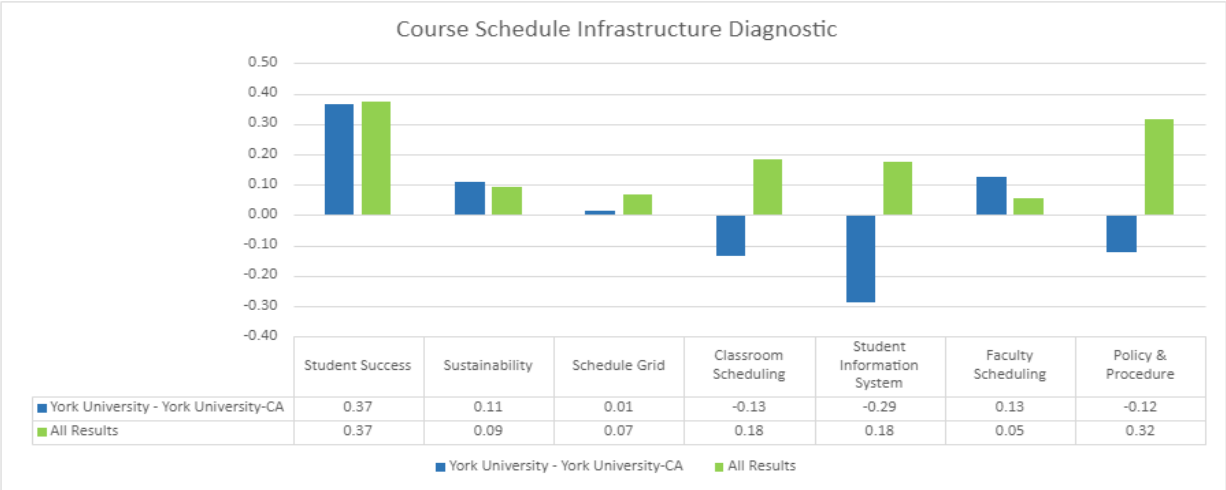
Results

Course Scheduling Infrastructure Diagnostic Survey

The Course Scheduling Infrastructure Diagnostic (CSID) survey questions and results are organized into the categories of student success, sustainability, schedule grid, classroom scheduling, student information system, faculty scheduling, and policy & procedure. The survey results are compared against other institutions that have completed the survey in a similar engagement as a reference point for institutions to gauge where there may be strengths and opportunities. This is not a benchmark and should not be interpreted as such. Scoring lower or higher than peers is a reference point only to begin further exploration.

Table 1 shows the overall comparison results in each category. York University respondents scored themselves lower than other institutions in the categories of student information system, classroom scheduling, policy and procedure, and schedule grid. The executive summary presentation (included in the appendix) includes a slide for every category and all survey statements; however, the remainder of this section of the report will focus on these four categories.

Table 1 – CSID Overall Comparison Results



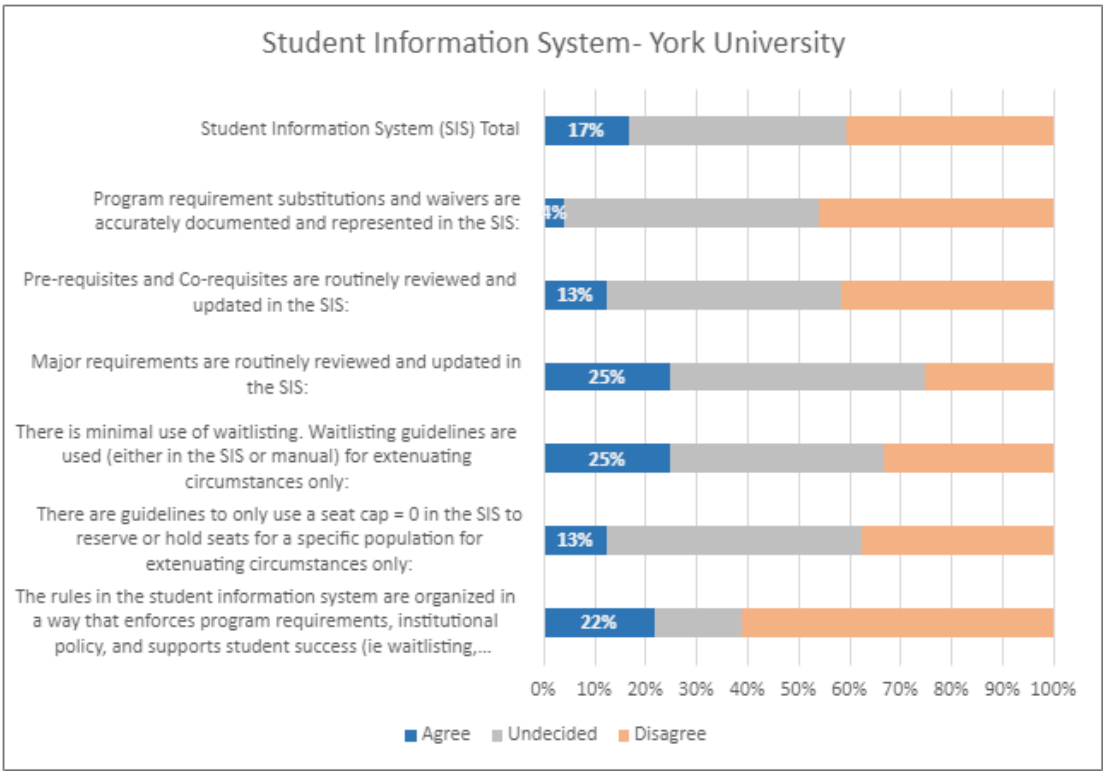
Student Information System

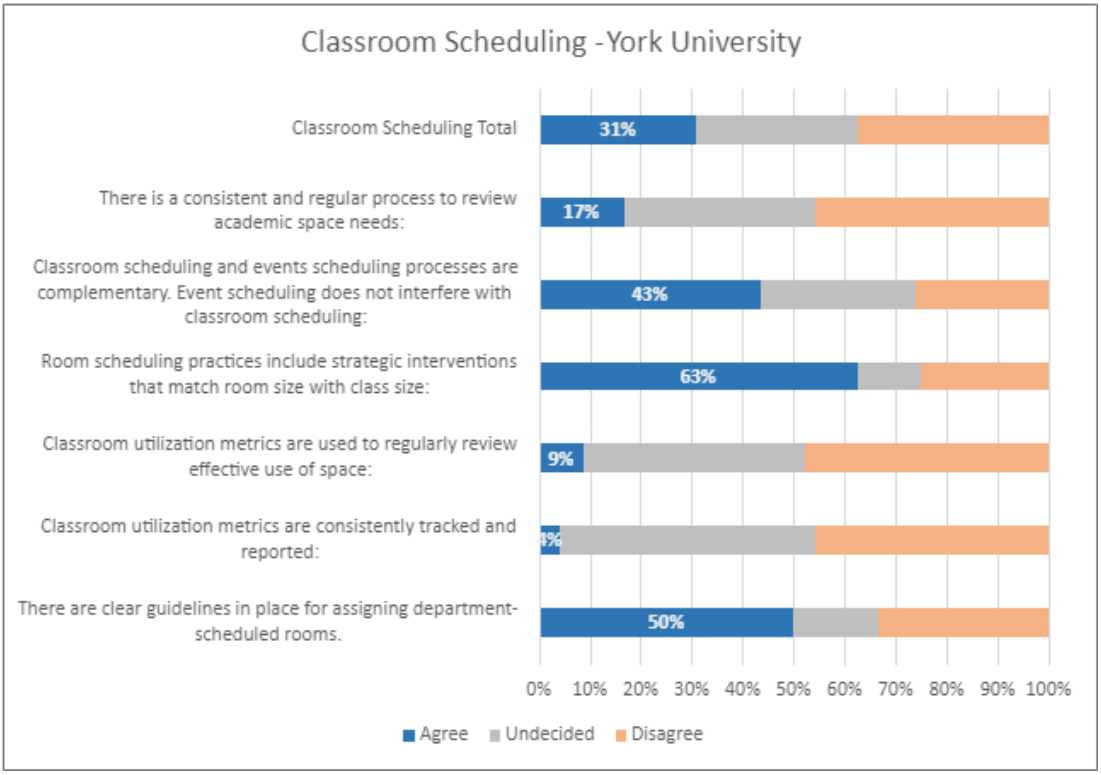
Questions in the student information system section of the survey allow the institution an opportunity to review and discuss how much detail course scheduling stakeholders do know and should know about key areas of the student information system as related to the course schedule. The results, as illustrated in the chart below, indicate not only a high number of undecided respondents but also quite a bit of a gap between the agree and disagree responses. Specifically, project consultants would encourage York to further investigate responses around the last prompt "The rules in the student information system are organized in a way that enforces program requirements, institutional policy, and supports student success." Having the student information

system align to course scheduling policies and procedures is critical to course scheduling infrastructure.

Classroom Scheduling

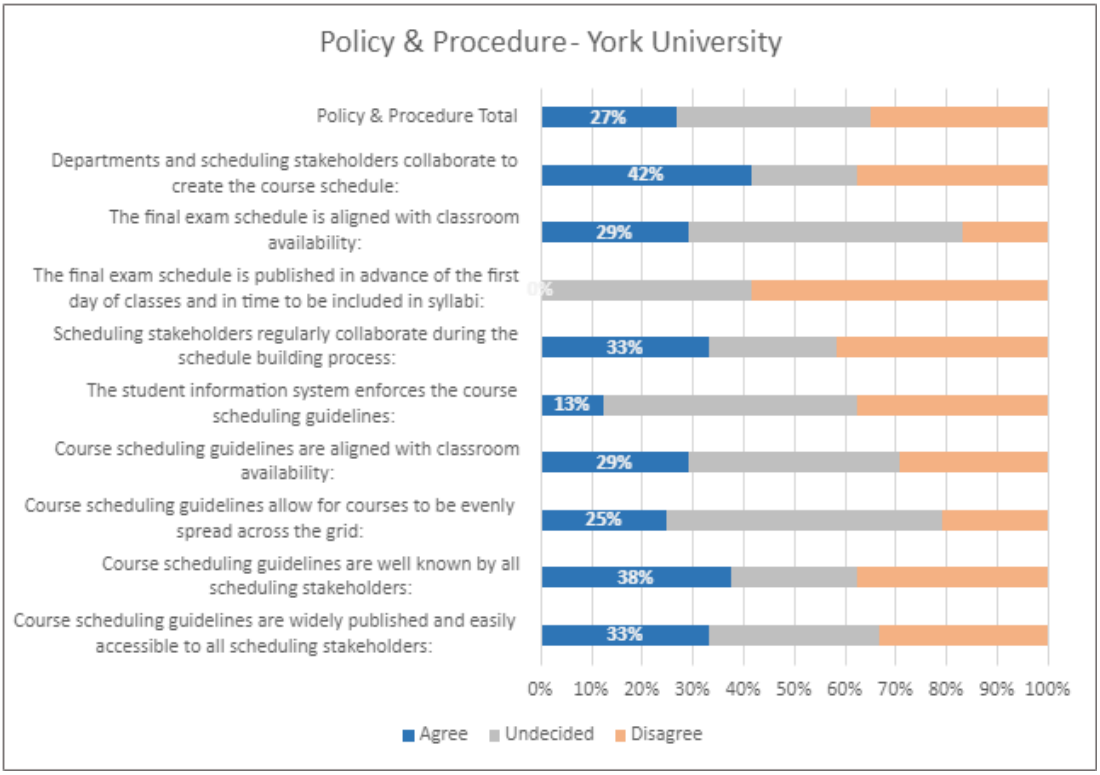
The results of the classroom scheduling section of the survey indicate an opportunity for growth for York University. However, it should be noted that there is 63% agreement around the statement "room scheduling interventions include strategic interventions that match room size with class size." This response would indicate that many course scheduling stakeholders are aware of and agree that these efforts are taking place. The consultants would encourage the institution to consider galvanizing around a set of key metrics that can be tracked to measure classroom scheduling effectiveness term over term. Key metrics should be determined based on goals and might include standard and prime week utilization, seat fill based on enrollment, and off-grid waste. York should also explore metrics available within the current room scheduling software to determine what is possible and how well it fits with classroom scheduling goals.





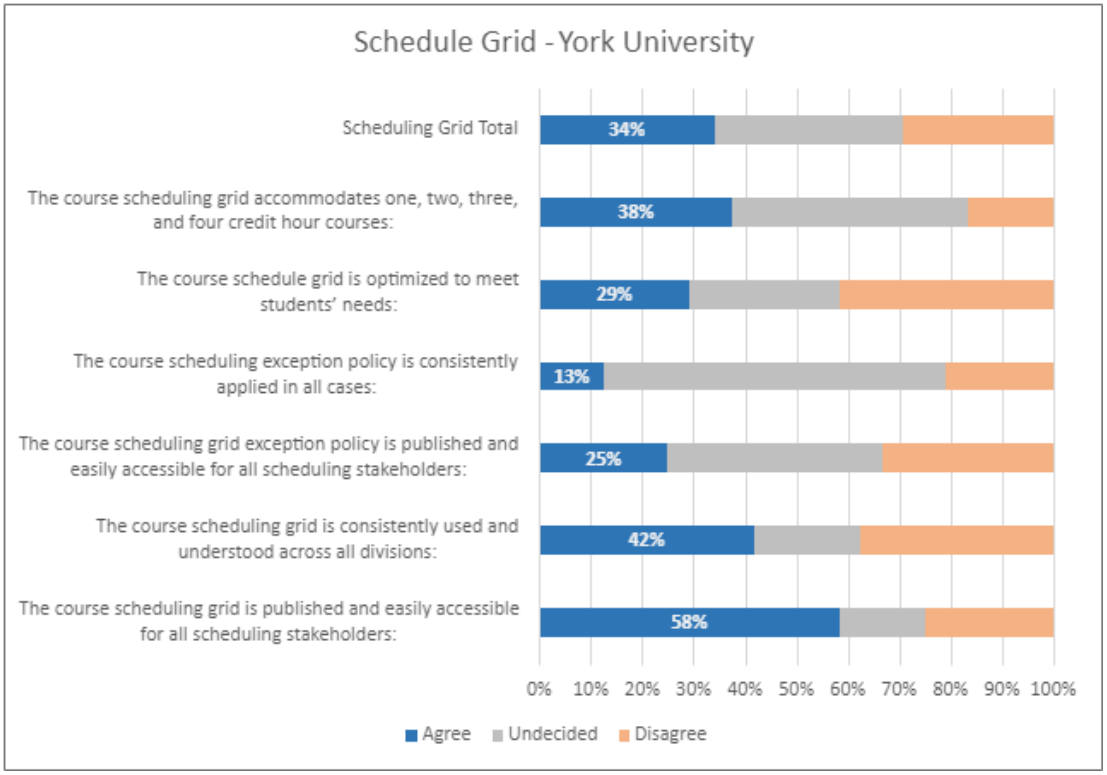
Policy & Procedure

When considering course scheduling policies and procedures, it is important to differentiate those that are published and the ad hoc practices that are in place that may or may not follow published guidelines. It is the consultants' understanding that no published course scheduling guidelines within an academic scheduling policy exist. The consultants noted a 42% agreement among respondents on the statement, "Departments and scheduling stakeholders collaborate to create the course schedule." This is wonderful to report, and the consultants encourage York to continue this effective practice. The consultants would encourage stakeholders to discuss how best to create awareness around and form an academic scheduling policy emphasizing course scheduling guidelines based on the results illustrated below.



Schedule Grid

Congratulations to York for having a course scheduling grid (set meeting patterns) that is distributed to course scheduling stakeholders during the schedule building process. Results from the strategic scheduling checkup below will review how well courses align with the established meeting patterns and the effectiveness in supporting student success. Upon review of this section of the survey, the consultants would encourage York to consider reviewing and including an exception process for off-grid scheduling within an approved academic scheduling policy. Survey results would indicate that several respondents are not aware of the exception processs, and including it within an approved academic scheduling policy would help address this issue.



Key Stakeholder Focus Groups

Key stakeholder focus groups consisted of 45-60 minutes conversations structured as a stop, start, continue exercise. Upon collection of all the qualitative focus group data, the consultants analyzed the feedback to identify emerging themes. The following themes were identified.

Strengths

- Commitment to data-informed continuous improvement
    - It has been clear throughout the entirety of the engagement that the stakeholders involved with the project are committed to using data to improve outcomes and inform their decisions. Stakeholders are supportive of the goals of the project and willing to change the ways processes are being done to ensure a stronger, more sustainable route.
- Academic Program Requirements
    - Stakeholders report that undergraduate academic program requirements are published and easily accessible to students. While there are some differences across the institution with availability of courses and processes for registration and scheduling, stakeholders agree that students are clear on what courses are needed to complete their degree. It should be noted that focus groups with students were not a part of this engagement; consequently, this sentiment has not been verified with a student group.
- Overall Student Success
    - Project stakeholders care about students, York University's mission, and the integrity of their work. There is a strong desire to remove barriers for students, especially within

the population of students that each stakeholder group represents, serves, or supports.

Opportunities

- Classroom Scheduling
    - The current process for course scheduling and for room scheduling includes a high degree of manual touch and use of spreadsheets.
    - A theme also emerged around confusion of scheduling the RAC rooms vs non-RAC rooms.
- Policies and Procedures
    - A theme emerged around the need for conceptual agreement about the primary goal or outcomes of the course schedule. Some stakeholders are optimizing for student success (i.e., a conflict- free schedule, alignment to students' needs), and others are optimizing for faculty requests, still, others are optimizing to balance the two.
    - Other themes emerged around the need for an outline for clear roles/responsibilities for course scheduling, awareness of and adherence to the off-grid exception process, and review/optimize the timeline for schedule planning, course schedule publication, and registration. Clear roles and responsibilities for course scheduling and the off-grid exception process should be included in an approved academic scheduling policy.
- Schedule Grid
    - A theme emerged around no break or passing period between time blocks, creating the need for instructors to let students out of class early to get to the next class on time. This also creates a bottleneck for instructors who need to enter a specific room and prep for the next class, instructors that need to help students after class, etc.
    - In general, there is a desire to have more visibility into the scheduling grid and the off-grid exception policy.
    - A theme emerged around the need to further review and refine final exam scheduling.
- Student information system
    - The current student information system is home-grown and therefore has certain limitations that are impacting the ability of stakeholders to carry out their roles and responsibilities effectively and as efficiently as possible. These limitations include but are not limited to, the ability to integrate with other software, the ability to automate internal processes that align with course scheduling guidelines. There is also a need for stakeholders to understand more about the student information system functionality and guidelines. This may help stakeholders overcome some of the current limitations.

Strategic Scheduling Checkup Analysis

The Strategic Scheduling Checkup leverages data within the Higher Education Scheduling Index™ to benchmark existing scheduling effectiveness and highlight the opportunities and approaches needed to realize them. It is important to note that the percentile ranking is based upon the 371 institutions included in our Higher Education Scheduling Index (HESI™) benchmark. Ad Astra reviewed Fall data from 2017-2021 for the course offering analysis. For the capacity analysis, results have been provided for both Fall 2019, as well as Fall 2021 for Classroom/Lecture Hall spaces on the Keele campus.

The Course Offering Summary below shows the Enrollment Ratio (fill rates) of Fall 2021 courses at York University. This provides some initial insight into how courses are filling. The Course Offering Analysis provides an overview of the recommendations that Ad Astra has made for Fall 2021 based on the historical trend data for individual course/campus combinations. These recommendations come in the form of what are called candidates. Addition candidates are defined as courses in which the historical trend suggests that an additional section could be filled to at least 50%. Reduction candidates use the same historical trend, but the data suggests that an entire section could be removed, and there would still be enough seats available to meet the historical demand for that course/campus combination.

Please make a note of the data below for Overloaded Courses and Addition Candidates. While the historical trend only suggests a need to add 4 sections in Fall 2022, the Course Offering Summary shows that 200+ courses were overloaded (filled > 95%) in Fall 2021. The "math" involved in the linear trend may not suggest the need to add a section that could be filled to at least 50%. Given the large section sizes at York University, that trend would need to be significant. The opportunity here lies in a deeper dive into the Overloaded Courses from Fall 2021 to determine where additional seats may be gained and offered in the Fall 2022 schedule.

Conversely, there are 50 potential sections for reduction. It is important to review if these courses are single section offerings, which may require further review of student need for the Fall 2022 term. However, this data could uncover opportunities to reallocate resources (space/faculty) to allow for the addition of needed seats/sections in the bottlenecked/overloaded courses.

Course Offering Summary

Strategic Scheduling Check-Up

Course Offering Summary - Fall 2021

Measurement	Percent	Courses	All Institutions Percentile
Enrollment Ratio (85% target)	79%		61st
Overloaded Course Ratio *(>95% Enroll Ratio)*	15%	202 of 1,338 courses	64th
Balanced Course Ratio *(>70% <95% Enroll Ratio)*	50%	669 of 1,338 courses	95th
Underutilized Course Ratio *(<70% Enroll Ratio)*	35%	467 of 1,338 courses	72nd

Course Offering Analysis

Strategic Scheduling Check-Up

Course Offering Analysis - Fall 2022

Measurement	Percent	Sections	All Institution Percentile
Reduction Candidates	2%	50 sections	90th
Addition Candidates	0.19%	4 sections	94th

The capacity analysis provides insights into your Classroom/Lecture space at the Keele Campus. As mentioned above, analysis is provided for both Fall 2019 and Fall 2021. Ad Astra reviews utilization metrics in two different ways: standard utilization and primetime utilization. Standard Utilization reviews the utilization during the hours the campus is "open," whereas primetime utilization reviews metrics during the peak hours in an academic schedule. The images below provide data around these metrics, as well as a visual to show the difference between classroom usage from 2019 to 2021.

Space Utilization Summary

Strategic Scheduling Check-Up

Space Utilization Summary

Measurement	2019 Percent	2019 Percentile	2021 Percent	2021 Percentile
Standard Utilization	51%	80th	27%	19th
Primetime Utilization	68%	65th	39%	8th
Primetime Compression	34%	83rd	43%	67th

Strategic Scheduling Check-Up

Space Utilization Parameters

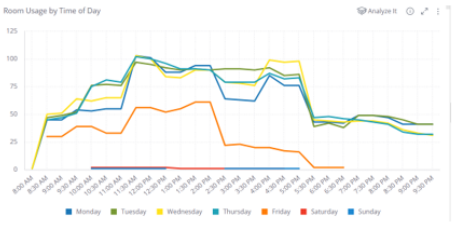
Standard Week (67.5 hrs)

Monday	8:30 AM - 10:00 PM
Tuesday	8:30 AM - 10:00 PM
Wednesday	8:30 AM - 10:00 PM
Thursday	8:30 AM - 10:00 PM
Friday	8:30 AM - 10:00 PM

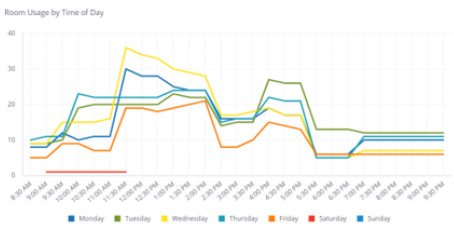
Primetime Week (30 hrs)

Monday	11:30 AM - 5:30 PM
Tuesday	11:30 AM - 5:30 PM
Wednesday	11:30 AM - 5:30 PM
Thursday	11:30 AM - 5:30 PM
Friday	11:30 AM - 5:30 PM

2019



2021



When reviewing how space is being utilized at the Keele Campus for classroom and lecture halls, it is helpful to consider the different meeting patterns being used within that Standard and Primetime to ensure the space is being used as efficiently as possible. Overall, there were 225 meeting patterns used in 2019, and that dropped to 107 in Fall 2021. Within these terms, the data shows Off-grid Waste to be 13% in 2019 and 19% in 2021. Off-grid waste is defined as the percentage of capacity wasted by scheduling non-standard meeting patterns during the prime-time hours. This increasing percentage of off-grid waste, which occurs when established patterns are not followed, can be a warning signal associated with scheduling conflicts for students. In Fall 2019, the Keele Campus was approaching the room bottleneck status (defined as 80% in primetime) at 68%. In Fall 2021, primetime utilization was down to 39%. Given these utilization metrics, overall, York University seems to have sufficient open space in Classroom/Lecture Hall rooms during prime-time and throughout the scheduling week. A review of unique meeting patterns may uncover the opportunity to optimize the meeting patterns to benefit York University's capacity concerns and result in fewer scheduling conflicts for students.

Strategic Scheduling Check-Up

Meeting Pattern Analysis

Measurement	Percent (Fall 2019)	Percentile (Fall 2019)	Percent (Fall 2021)	Percentile (Fall 2021)
Off Grid Usage	35%	15th	19%	45th
Off Grid Waste	13%	44th	19%	14th

Recommendations

The options and recommendations below are based on the results of triangulating the data and feedback collected from three data sources (course scheduling infrastructure diagnostic, stakeholder interviews, and strategic scheduling checkup). York University already has a project steering committee in place to oversee the project. The next phase of the project is to create an action plan with the steering committee. In this phase, the steering committee in collaboration with appropriate stakeholders and leadership approval will determine how York shall proceed to achieve their goals and an appropriate timeline for action.

Policy & Process Recommendations (York University)

- Create an academic scheduling policy

- Qualitative feedback indicates that there are multiple processes and systems being used among the faculties to build, refine, and communicate the course schedule. Multiple systems create inconsistencies and increase the likelihood of user error.
- Clear policies and procedures ensure clarity and transparency across the institution for any complex endeavor that includes multiple stakeholders. The development of supporting documentation can ensure input and feedback from key stakeholders. An academic scheduling policy would greatly benefit stakeholders when building, editing, and publishing the course schedule. When there is stakeholder or leadership transition, such policy will help ensure the success of future stakeholders. There is already a strong governance process in place to approve important policies. The consultants believe that using the governance processes already in place to create an academic scheduling policy is of prime importance to the institution and should be started as soon as possible.
- The academic scheduling policy would include guiding principles that would provide structure to assist when departments/faculties are requesting the same space. An Academic Scheduling Policy should outline the roles, responsibilities, and functions of key scheduling stakeholders. It should provide clear policy language and serve to answer stakeholder questions. Some of the suggested items to include in the policy are also listed as separate recommendations and are discussed in detail in the recommendation. Please note that these are not the only components of an academic scheduling policy. York is encouraged to customize the policy according to the needs of the institution.
    - Priority Room Scheduling Guidelines (see priority room scheduling recommendation below)
    - Approved Meeting Patterns and Exception Guidelines (see meeting pattern analysis recommendation below)

- Include Priority Room Scheduling Parameters and Guiding Principles in an Academic Scheduling Policy
    - Priority room scheduling refers to a process and timeline that allow certain departments or faculties to assign classroom spaces before those classrooms become general classroom spaces for academic scheduling. After a certain date in the course scheduling process, classrooms that remain unscheduled are used by the academic scheduling unit for general classroom assignments to optimize classroom space and efficiency.
    - Classroom space and room scheduling emerged as a significant concern across data sets. The consultants also want to highlight the willingness of stakeholders to collaborate and share classroom space to support the institution's needs. Additionally, there are concerns about how best to collaborate while ensuring the needs of departments that have primary responsibility for maintaining a space are still met. The consultants encourage York to consider creating and adopting clear, transparent priority room scheduling guidelines within an academic scheduling policy.
    - Priority room scheduling guidelines serve the purpose of making clear what rooms departments can schedule, priority scheduling timeline and access, and when unused classrooms in the priority scheduling pool will be turned over to the academic scheduling office for general classroom scheduling.

    - Should York want to use data to inform such guidelines within an academic scheduling policy, York can engage with Ad Astra to do a more in-depth capacity analysis around RAC and non-RAC rooms compared with department enrollment numbers. This capacity analysis can be included in the Meeting Pattern Analysis service from Ad Astra, mentioned in a later recommendation. For some institutions, this type of analysis can be used to maintain their classroom inventory and guidelines for departmental priorities for classroom space.

- Establish and Adhere to Standard Meeting Patterns
    - As indicated in the results above, concerns emerged through qualitative and quantitative analyses about the meeting patterns used at York. Concerns included no break or passing period and exclusively one day per week class times. Additionally, the data indicated more off-grid usage than on-grid usage of the set meeting patterns. An intensive deep dive into these issues was not within the scope of this project; however, the consultants encourage York to consider how current meeting patterns may be causing barriers for students and instructors, impacting effective and efficient use of classrooms, and other unintended consequences. If York would like assistance with this work from Ad Astra, the Meeting Pattern Analysis consulting service recommended below will support this area.
    - There is no single meeting pattern grid that is universally recommended by the consultants but analyzing the percentage of sections that fall into contact hour bands can be useful in determining options for an institution. For example, most of York's offerings are taught as three contact hour sections. Therefore, the meeting pattern grid should optimize for this majority use case. Pedagogy should be the main driver of the patterns, but the industry seems to be moving to a combination of a 3-day/week 50-minute (MWF) and 2-day a week 75–80-minute (T/TH) patterns as the most desirable for students and faculty.
    - It is recommended that York include language around the adoption and use of approved meeting patterns in an academic scheduling policy as well as how York will handle exceptions to care for appropriate use cases when courses/sections can be scheduled outside the approved meeting patterns.
- Consider Additional Course Demand Analyses
    - The consultants want to acknowledge that course scheduling stakeholders are committed to using data to better inform the building of the course schedule. From the analyses, the priority should be on eliminating bottleneck courses to remove barriers and pent-up demand for specific courses.
    - To take action on this recommendation, York could begin by reviewing all courses that are completely full at the census date for the previous like term. Evaluating whether these courses are always full (in like terms and in other terms) can help to prioritize situations where a lack of seats may be contributing to an inability for students to register for required courses. More advanced data analysis can be conducted utilizing software to perform a historical and predictive analysis of course demand. Some institutions can conduct this analysis on their own; however, Ad Astra is able to provide this type of software should the Steering Committee pursue this as an action item.
- Utilize Data to Support Student-Centric Course Scheduling Through Pathways

- The post-pandemic landscape of higher education will continue to evolve, as will the needs of York's students. The consultants encourage continuous dialogue among the steering committee, executive leadership, and course scheduling stakeholders about how best to balance students' course scheduling needs and faculty course day/time requests and classroom needs. As the course scheduling infrastructure matures using the recommendations above, there will be additional ways to use data to support success through scheduling. The steering committee can have productive conversations about understanding or predicting student demand, analyzing student preferences for specific course or degree requirements, and refining pathway offerings to ensure students can register for the courses they need in the appropriate term. Such strategic planning ahead of schedule building will support the institution's desire to keep the completion promises they make to students upon admission to York University.

Existing Software & Service Recommendations (York University)

- Business Process Review and Audit Use of Room Scheduling Software (R-25)
  - One of the recurring themes that emerged from the qualitative data is the significant amount of manual work that is taking place to build and monitor the course schedule, as well as the difficulty of effectively and efficiently scheduling classrooms. The more manual work and data entry that takes place, the more room there is for human error and inefficiencies regarding the use of space. The consultants acknowledge that the room scheduling software has recently been fully implemented. Once the university has been using the software for two full scheduling cycles, it is suggested that a business process review and subsequent audit be completed to ensure that the room scheduling software is supporting the course scheduling business processes.
- Continue Implementing Current Plan for SIS and Optimize to Support Course Scheduling Business Processes (Oracle)
  - There was significant feedback regarding the limitations of using and maintaining a home-grown, antiquated student information system. It is a recommendation of the consultants for York to continue prioritizing moving toward an established student information system product that integrates easily with other student success and business intelligence software already in place or planned for use in the future. The student information system is an integral piece of course scheduling infrastructure, and the capacity within an updated system would allow stakeholders to eliminate errors and automate and enforce course scheduling policies and procedures. As an example, course credit exclusions are not automatically handled in the student information system so students may register in error for a course where they have already received credit. This impacts scheduling because unnecessary seats of certain courses may be offered.

Software & Service Recommendations (Ad Astra)

- Registration Monitoring and Tracking (Ad Astra - Monitor Software)

    - Registration monitoring and tracking software would allow key stakeholders to easily watch and track registration velocity and provide key data on courses such as modality, enrollment, number of sections, and location to help make important decisions during student registration.
- Meeting Pattern Analysis (previously included in the RFP)
    - While York University could make progress on establishing common meeting patterns without additional Ad Astra analysis, this service offering would allow the consultants to dive deeper into the noted capacity concerns. The quantitative data indicates that York University is not as constrained in classroom utilization as it feels during scheduling. The current overlapping meeting pattern usage (for most patterns, off-grid usage is higher than on-grid usage) is creating constraints felt in classroom utilization. This additional analysis would allow York to determine the structure of a meeting pattern grid that can accommodate pedagogical needs while optimizing available space.
- Pathways Analysis (A combination of previously titled Cohort Enrollment Health and Degree Velocity in original proposal).
    - Pathways or degree maps (the term-by-term list of courses required) provide students with a clear and direct path to degree completion. The creation of pathways is the simplest, most cost-effective, and highest return action an institution can take to facilitate students' on-time degree completion. When created and implemented effectively, pathways can improve student degree velocity, graduation rates, and retention rates. If selected, this service will help guide the institution through the process of creating pathways and analyzing them across the curriculum to ensure successful implementation at scale. Building a pathways infrastructure would allow York to create synergy in offerings and increase a student's time to completion.
    - During the sales process, Ad Astra identified several service opportunities for York to consider. This consulting service has since been renamed at Ad Astra and combines two of the opportunities provided during the sales process (Cohort Enrollment Health and Degree Velocity). Degree Velocity measurements (how quickly students are progressing) can only be assessed against the pathways.

Appendix A
Original RFP Service List

The current project was part of an RFP. In the RFP response by Ad Astra, three additional services were mentioned based on the knowledge that Ad Astra had the time that was believed to align best with York's goals. For reference, the consulting services listed in the RFP were as follows:

Meeting Pattern Analysis

Scope

This engagement analyzes current scheduling practices around meeting patterns in use, dominant meeting patterns based on sections offered, and space utilization to ensure that an institution's meeting pattern grid is promoting student success. Understanding academic space constraints, as well as the institution's scheduling goals, help to inform recommendations for scheduling grid changes to meet those needs while allowing flexibility where needed. This analysis can also provide insights into proposed scheduling grid changes and the impact on the institution post-implementation.

Cohort Enrollment Health

Scope

Institutions are faced with tough decisions about how best to sustain enrollments in academic programs. Delivery methods and modes of institutional offerings significantly impact whether an academic program can be sustainable. The number of campuses, restricted day/evening cohort programs, online-only offerings, accelerated programs, while designed to meet students' needs better, often divide programs to the point of being unsustainable. Pathway or course program requirements can cause further division by dispersing students among several courses versus concentrating enrollment in fewer options. This service provides a data-informed planning framework to manage student cohorts and progression through pathways.

Degree Velocity

Scope

Degree velocity is a comprehensive analysis of students' progress through their academic program pathway. A combination of a productive and unproductive credit hour and program pathway data are used to determine a current velocity rate and projected completion time. Results are reported by academic program pathways using average student velocity, allowing institutions to determine where critical bottlenecks may be impeding student progress. Unlike graduate rate data, a post hoc analysis using a cohort that already graduated, degree velocity uses real-time student progress data that is representative of full-time and part-time students to produce actionable results.

Since the RFP was submitted, Ad Astra has renamed some of the service offerings above. In addition, the consultants are using the results of the current project to make service recommendations based on what will best serve York in attaining its goals.

2022–2023
Course Scheduling User Manual
Office of the University Registrar

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Overview

The Course Scheduling User Manual provides assistance in the process of retrieving, updating and submitting the following spreadsheets and reports involved in the course scheduling process:

- retrieving, updating and submitting the **Initial Offering (IOF) Spreadsheet**
- submitting **Course Notes**
- retrieving, updating and submitting the **Confirmation of Offering (COF) Spreadsheet**

Symbols used in the manual

important	**A reminder of key information**
warning	**An alert to common trouble spots**

SUMMER 2022 COURSE OFFERING DEADLINES - ALL FACULTIES

Dates	Description	Source/Destination
Currently available	▸ **Initial Offering (IOF) Report available** Spreadsheet is available for download, review and update.	download spreadsheet from **www.sis.yorku.ca**
Thursday October 7– 2 to 4 PM **Tuesday October 12 – 9 to 11 AM** **Wednesday October 13 - 2 to 4 PM** **Tuesday October 19 – 2 to 4 PM**	▸ **Scheduling Forums** 4 available options to attend. Attendance is required.	**https://acadschd.apps01.yorku.ca/machform/view.php?id=14181** Note: form will be available for submissions as of Monday October 4, 2021
November 1, 2021	▸ **Initial Offering (IOF) due** Submission of Summer 2021 Course Offerings is due from departments. **Please DO NOT submit changes between Nov 2 to Nov 17, 2021.**	submit updated spreadsheet to **acadschd@yorku.ca**
November 29, 2021	▸ **Confirmation of Offerings (COF) Report available** Spreadsheet available for download, review and update.	download spreadsheet from **www.sis.yorku.ca**
December 20, 2021	▸ **Confirmation of Offerings (COF) due** Submission of changes for Summer 2021 Course Offerings is due from departments. **Please DO NOT submit changes between Dec 21 to Jan 14, 2022.**	submit updated spreadsheet to **acadschd@yorku.ca**
January 13, 2022	▸ **Course Access Specifications (CAS) Report available** Reports available for download, review and update.	download from **www.sis.yorku.ca**
January 24, 2022	▸ **Course Notes** submission due.	submit course notes online at http://intranet.registrar.yorku.ca/policies/notes/
January 24, 2022	▸ **Course Access Specifications (CAS) due** Submission for CAS Updates due from departments.	submit updated spreadsheet to: **acadcas@yorku.ca**
February 1, 2022	▸ Course Timetable online.	**https://w2prod.sis.yorku.ca/Apps/WebObjects/cdm**

FW 2022-2023 COURSE OFFERING DEADLINES - ALL FACULTIES

Dates	Description	Source/Destination
Currently available	▸ **Initial Offering (IOF) Report available** Spreadsheet is available for download, review and update.	download spreadsheet from **www.sis.yorku.ca**
November 9– 9:00 to 11:00 AM	▸ **Scheduling Forum** Refresher, attendance not required	**https://acadschd.apps01.yorku.ca/machform/view.php?id=14181** Note: form will be available for submissions as of Monday October 4, 2021
November 30, 2021	▸ **Initial Offering (IOF) due** Submission of FW 2021-2022 Course Offerings is due from departments. **Please DO NOT submit changes between Dec 1 to Dec 17, 2021.**	submit updated spreadsheet to **acadschd@yorku.ca**
January 24, 2022	▸ **Confirmation of Offerings (COF) Report available** Spreadsheet available for download, review and update.	download spreadsheet from **www.sis.yorku.ca**
February 1, 2022	▸ **Confirmation of Offerings (COF) due** Submission of changes for FW 2022-2023 Course Offerings is due from departments. **Please DO NOT submit changes between Feb 2 to Feb 18, 2022.**	submit updated spreadsheet to **acadschd@yorku.ca**
February 1 to February 18, 2021	Academic Scheduling available to review unplaced course offerings for FW 2022-2023.	submit email to **dcloss@yorku.ca, larms@yorku.ca**
February 24, 2022	▸ **Course Access Specifications (CAS) Report available** Reports available for download, review and update.	download from **www.sis.yorku.ca**
March 7, 2022	▸ **Course Access Specifications (CAS) due** Submission for CAS Updates due from departments.	submit updated spreadsheet to **acadcas@yorku.ca**
March 21, 2022	▸ **Course Notes submission due.**	submit course notes online at http://intranet.registrar.yorku.ca/policies/notes/
April 4, 2022	▸ **Course Timetable online.**	**https://w2prod.sis.yorku.ca/Apps/WebObjects/cdm**

Quick Guide: Reports / Tasks and Contacts

COURSE OFFERING INQUIRIES & REQUESTS	CONTACT	
Course offering and CAS changes	acadschd@yorku.ca	
Ad Hoc Booking Requests	https://yulink-new.yorku.ca/group/our-academic-scheduling/room-booking	
Yu Link OUR-Academic Scheduling	https://yulink-new.yorku.ca/group/our-academic-scheduling/home	
Academic Scheduling Team (AST)	**Denise Closs**	Assistant Director
	Aaron Ross	Manager
	Lisa Armstrong	Team Lead
	Anna Graniero	Analyst
	Deena Nguyen	Analyst
	Enza De Bellis	Analyst

CLASSROOM INFORMATION	CONTACT
Guest Speakers and Temporary Use of University Space: Procedures / Applications	http://tuus.info.yorku.ca/
Ordering Classroom Equipment	http://ceo.yorku.ca/
Request for Special Classroom Software a standard set of software that is already installed - see the list of software applications	http://staff.computing.yorku.ca/faculty-staff/teaching-research-computing/classroom-technology/list-of-applications-available-in-classrooms/
REPORTING CLASSROOM PROBLEMS	
Issues with Room Configurations, Room Temperature, Broken or Missing Furniture Locked Classrooms (7am to 4pm Monday to Friday)	facilities@yorku.ca Work Control Centre, CSBO extension 22401
Issues with Room AV	ASKIT@yorku.ca UIT Help Desk extension 55800
Locked Classrooms (after 4pm Monday to Friday and on weekends)	Security extension 58000
Emergencies	Security extension 33333

Initial Offering (IOF) Spreadsheet (All Faculties)

Dates and Deadlines

For dates and deadlines concerning the Initial Offering (IOF) Spreadsheet, please refer to p. 4, 5.

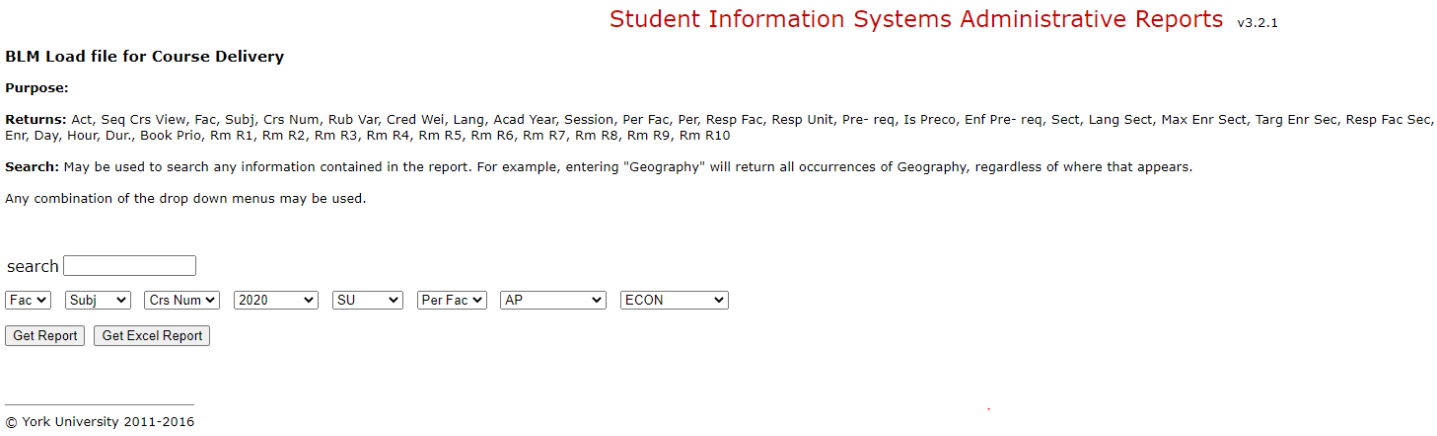
Retrieving the Initial Offering (IOF) Spreadsheet

Retrieve the offerings from the previous Academic Period. Modify offerings for the upcoming Academic Period.

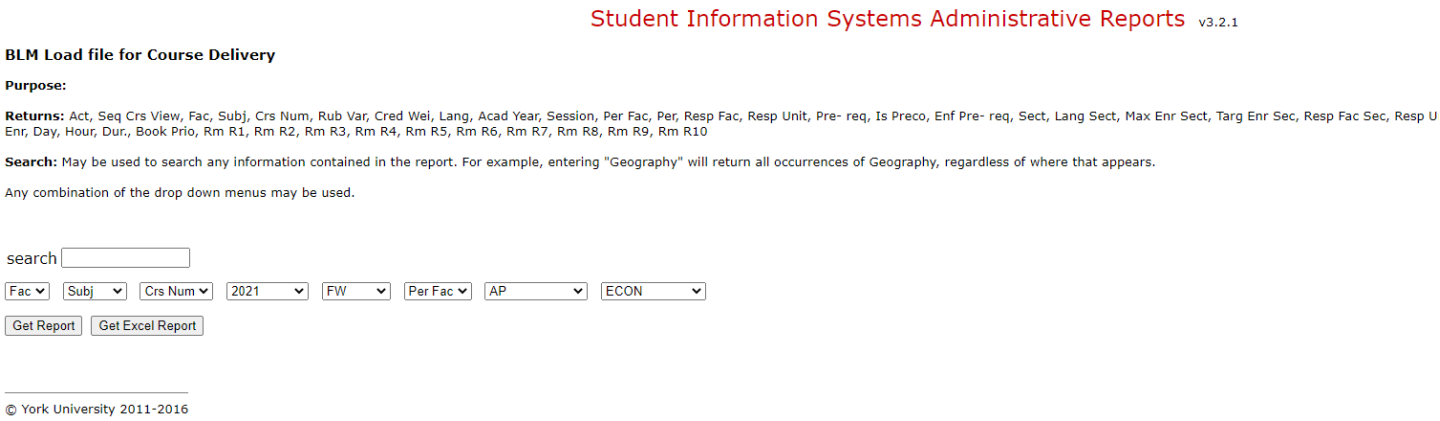
1. Go to the Student Information System (SIS) website at www.sis.yorku.ca
   - Click on **Administrative Reports (SRM)** under the **For Administration** section.
   - Log in to Passport York (if prompted).
   - Expand the **Courses** button. Click on **BLM Load file for Course Delivery.**

NOTE: IF YOU DO NOT HAVE ACCESS TO SIS ADMINISTRATIVE REPORTS, PLEASE CONTACT YOUR DIRECT MANAGER.

2. Choose from SU 2021 offerings:
   - To retrieve SU 2021 offerings.
     - Choose *2020* as the **Academic Year** (Academic Year).
     - Choose *SU* as the **Session** (Study Session).
     - If you want to download the course sections your Faculty/Department is responsible for, choose from the **Resp Fac Sec** and/or **Resp Unit Sect** drop down menus.
       - ▷ If your department does not have offerings in other departments, then choose from the **Fac** (Faculty) and **Subj** (Subject) drop down menus.
     - Click the **Get Excel Report** button. The report will open in Excel.



   - To retrieve FW 2022-2023 offerings
     - Choose *2021* as the **Academic Year** (Academic Year).
     - Choose *FW* as the **Session** (Study Session).
     - If you want to download the course sections your Faculty/Department is responsible for, choose from the **Resp Fac Sec** and **Resp Unit Sect** drop down menus.
       - ▷ If your department does not have offerings in other departments, then choose from the **Fac** (Faculty) and **Subj** (Subject) drop down menus.
     - Click the **Get Excel Report** button. The report will open in Excel.


Student Information Systems Administrative Reports v3.2.1

BLM Load file for Course Delivery

Purpose:

Returns: Act, Seq Crs View, Fac, Subj, Crs Num, Rub Var, Cred Wei, Lang, Acad Year, Session, Per Fac, Per, Resp Fac, Resp Unit, Pre- req, Is Preco, Enf Pre- req, Sect, Lang Sect, Max Enr Sect, Targ Enr Sec, Resp Fac Sec, Resp U Enr, Day, Hour, Dur., Book Prio, Rm R1, Rm R2, Rm R3, Rm R4, Rm R5, Rm R6, Rm R7, Rm R8, Rm R9, Rm R10

Search: May be used to search any information contained in the report. For example, entering "Geography" will return all occurrences of Geography, regardless of where that appears.

Any combination of the drop down menus may be used.

search

Fac | Subj | Crs Num | 2021 | FW | Per Fac | AP | ECON

Get Report | Get Excel Report

© York University 2011-2016

3. Before you begin working on the spreadsheet, save it as an excel spreadsheet.

DO NOT change the order of the columns or rows of the spreadsheet.

Submitting the spreadsheet

4. Make your changes to the spreadsheet: (see the Add / Update / Delete section later in this manual).

   - Save the file, and e-mail it to acadschd@yorku.ca

DO NOT copy individual Academic Scheduling staff on the e-mail.

Reading the Initial Offering (IOF) Spreadsheet

The following section provides information about the various columns on the spreadsheet.

What is on the spreadsheet?
Depending on the options selected when you downloaded your spreadsheet, you should be looking at the complete list of meets that were offered in either SU 2022 or FW 2022-2023. This includes course meets that were cancelled, and course meets that were kept as back-ups (see Appendix B). Each meet has its own row on the spreadsheet, which means that some course sections may have more than one row. For example: A lecture (LECT) that was taught on Mondays, Wednesdays and Fridays would have three rows.

Sample of an Initial Offering (IOF) Spreadsheet
To make the spreadsheet easier to read in Excel:

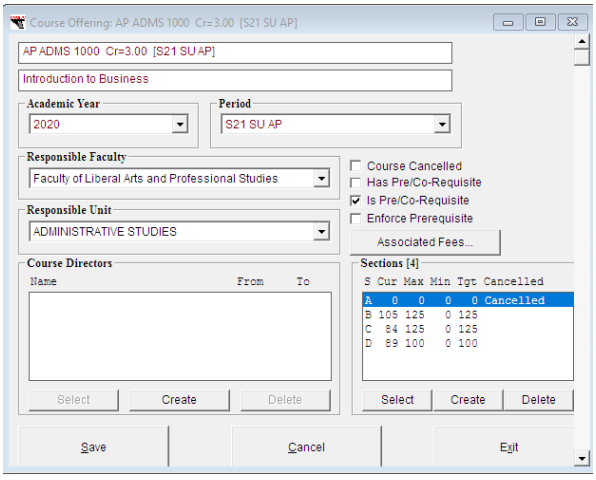
1. change the orientation of the column titles from horizontal to vertical.
2. re-size the columns so that all content is visible.
3. freeze the top row (column titles), so it remains visible as you scroll down the rows.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR
1	Act	Seq Crs View	Fac	Subj	Crs Num	Rub Var	Cred Wei	Lang	Acad Year	Session	Per Fac	Per	Resp Fac	Resp Unit	Pre- req	Is Preco	Enf Pre- req	Sect	Lang Sect	Max Enr Sect	Targ Enr Sec	Disp Fac Sec	Resp Unit Sec	Inst	Grp	Req	Campus	Lang Meet	Max Enr	Targ Enr	Day	Hour	Dur.	Book Prio	Rm R1	Rm R2	Rm R3	Rm R4	Rm R5	Rm R6	Rm R7	Rm R8	Rm R9	Rm R10
2	?	288151	AP	ADMS	1000		3	EN	2020	SU	AP	SU	AP	ADMS	N	Y	N	B	EN	125	125	AP	ADMS	LECT	1	W	YK	EN	125	125	T	16:00	180		72									
3	?	288151	AP	ADMS	1000		3	EN	2020	SU	AP	SU	AP	ADMS	N	Y	N	C	EN	125	125	AP	ADMS	LECT	1	W	YK	EN	125	125	R	11:30	180		72									
4	?	288151	AP	ADMS	1000		3	EN	2020	SU	AP	SU	AP	ADMS	N	Y	N	D	EN	100	100	AP	ADMS	ONLN	1	W	YK	EN	100	100		0:00	0	0										

Figure 1: Example of a downloaded IOF Spreadsheet

Example: The spreadsheet above shows AP/ADMS 1000 3.0 SU21 (SU=Session and 2020=Academic Year)

- **Column I** (Acad Year) indicates AP/ADMS 1000 3.0 was taught in academic year 2020.
- **Column L** (Period) indicates AP/ADMS 1000 3.0 was taught in period code SU.
- **Column R** (Section) indicate that Section B and C were taught as LECT while section D was taught as Fully Online. Note IOF spreadsheet does not include cancelled sections/courses. You can view all sections of ADMS 1000 3.0 SU21 including the cancelled section A via COS (see below).



Only **Column F** (Rubric Variance) and **Columns (AI–AR)** (Room Requirements) may be left blank when you submit the Confirmation of Offering (COF) Spreadsheet.
Any spreadsheet containing additional blank columns will be returned to you for revision and only processed once we have received your corrected version.

Explanation of the Columns of the Initial Offering (IOF) Spreadsheet
The following tables explain each of the column titles and possible update options:

	Column	Column Title	Spreadsheet Update Options/Examples	Explanation
Course ID Information	**A**	**Act** (Action)	A = Add (to create a new course offering)	ⓘ In the first spreadsheet you submit to the Office of the University Registrar, ALL courses will be Action "A". **Change the "?" to "A".**
	B	**Seq Crs View** (Sequential Course View)	The Seq Crs View of the course that the offering is for.	This field **MUST NOT be left blank.** If you are creating offerings for a course that was NOT offered in SU 2021 or FW 2021-2022, you will need to look up this number in COS. (See "Scenario 2: Adding a Course NOT currently on the Initial Offering (IOF) Spreadsheet" later in the manual).
	C	**Fac** (Faculty)	AP, ED, EU, FA, GL, GS, HH, LE, LW, SB, SC	Enter Faculty acronym.
	D	**Subj** (Subject)	ANTH, BIOL, etc.	Enter course subject acronym Use CAPITAL LETTERS.
	E	**Crs Num** (Course Number)	1010, 2021, etc.	Enter four-digit Course Number.
	F	**Rub Var** (Rubric Variance)	A, B, C etc. or Blank	Use if the course number has a letter immediately after it (e.g. HUMA 4000A 6.00). ⓘ **This is NOT the section letter. This entry will be blank for most courses**.
	G	**Cred Wei** (Credit Weight)	0, 3.00, 6.00, 9.00, 12.00, 1.25 etc.	The academic Credit Weight of the course. It is essential that this be completed accurately.
	H	**Lang** (Language of Instruction)	EN, FR, etc.	The Language of instruction for the entire course (all sections).

Columns (A-H) must be identical for ALL meets of the same course.

For cross-listed courses: The items in this section are for the original course ID.

Do NOT change them to match the cross-listed course ID.

See the "**Important Reminders**" section for more information on cross-listed and integrated courses.

	Column	Column Title	Spreadsheet Update Options/Examples	Explanation
Course Offering Information	**I**	**Acad Year** (Academic Year)	Enter 2021 for Summer or 2022 for Fall/Winter	**Academic Year course is offered.** **For SU 2022 change to 2021.** **For FW 2022–2023 change to 2022.**
	J	**Session**	SU, FW	Academic Session course is offered.
	K	**Per Fac** (Period Faculty)	AP, ED, EU, FA, GL, GS, HH, LE, LW, SB, SC	Matches Faculty acronym in Column C.
	L	**Per** (Period)	F, W, Y, SU, etc.	Sessional date Period code for the course. for Summer Period Codes, if offered in a condensed period, must adjust the offering dates must be adjusted, ie: S1 for a 6.0 course should be 4 days 180 mins.
	M	**Resp Fac** (Responsible Faculty)	AP, ED, EU, FA, GL, GS, HH, LE, LW, SB, SC	Responsible Faculty for all the sections of the course.
	N	**Resp Unit** (Responsible Unit)	ANTH, ADMS, BIOL, etc.	Responsible Unit/Department for all sections of the course.
	O	**Pre- req**	Y or N	Use “Y” if the course has a pre- or co-requisite. Use “N” if it does not.
	P	**Is Pre/co** (Is Pre/Co-requisite)	Y or N	Use “Y” if the course is a pre- or co-requisite. Use “N” if it is not.
	Q	**Enf Pre- req** (Enforce Pre/Co-requisite)	Y or N	Use “Y” if your course repository officer has coded the course pre-requisites in COS and if you want to prevent students who don’t meet the pre-requisites from enrolling. Use “N” if your course repository officer has coded the course pre-requisites in COS but you DO NOT want to prevent students who don’t meet the pre-requisites from enrolling. Use “N” if your course repository officer has NOT coded the pre-requisites in COS. If the **Enforce Pre-requisite** flag is checked and the pre-requisite information has not been coded in the repository, then students will not be able to enroll in the course.

<table>
<tr><th></th><th>Column</th><th>Column Title</th><th>Spreadsheet Update Options/Examples</th><th>Explanation</th></tr>
<tr><td rowspan="6">Section Information</td><td>R</td><td>Sect
(Section Key)</td><td>
<table>
<tr><th colspan="2">SUMMER</th></tr>
<tr><th>Term</th><th>Section</th></tr>
<tr><td>SU</td><td>A to Z</td></tr>
<tr><td>S1</td><td>A to L</td></tr>
<tr><td>S2</td><td>M to Y</td></tr>
</table>
<table>
<tr><th colspan="2">FALL/WINTER</th></tr>
<tr><th>Term</th><th>Section</th></tr>
<tr><td>F</td><td>A to L</td></tr>
<tr><td>Y</td><td>A to Y</td></tr>
<tr><td>W</td><td>M to Y</td></tr>
</table>
<table>
<tr><th colspan="2">EECS & MATH for LE ENG students</th></tr>
<tr><th>Term</th><th>Section</th></tr>
<tr><td>F</td><td>E</td></tr>
<tr><td>Y</td><td>Z</td></tr>
<tr><td>W</td><td>P</td></tr>
</table>
</td><td>This is the section letter for the course and cannot be blank.

If a course is offered in more than one period code within the same academic session (Fall/Winter or Summer), they MUST have a different section letter.

If offering sections in overlapping Periods, (e.g. SU and S1, the offering in S1 must be the next letter - SU is Section A and S1 is Section B)

A course offered in F and Y cannot have the same section letter. The Y will begin at A and the F will follow.

Except for EECS & MATH courses for LE ENG students, the section lettering MUST be sequential. If not, it will be changed by the Academic Scheduling staff.</td></tr>
<tr><td>S</td><td>Lang Sect
(Language of Instruction Section)</td><td>EN, FR, etc.</td><td>Language of instruction for the specific section.</td></tr>
<tr><td>T</td><td>Max Enr Sect
(Maximum Enrolment Section)</td><td>25, 100, etc.</td><td></td></tr>
<tr><td>U</td><td>Targ Enr Sec
(Target Enrolment Section)</td><td></td><td>Target number of students allowed to enroll in the section.
The Target will be activated at the start of term.</td></tr>
<tr><td>V</td><td>Resp Fac Sec
(Responsible Faculty Section)</td><td></td><td>Responsible Faculty for all meets for the current section of the course.</td></tr>
<tr><td>W</td><td>Resp Unit Sec
(Responsible Unit Section)</td><td></td><td>Responsible Unit/Department for all meets for the current section of the course.</td></tr>
</table>

	Column	Column Title	Spreadsheet Update Options/Examples	Explanation
Meet Information	**X**	**Inst** (Instructional Format)	BLEN = blended learning CLIN = clinical CORS = correspondence DIRD = directed reading DISS = dissertation FDEX = field experience FIEL = field trip IDS = individual directed study INSP* = internship ISTY = independent study LAB = lab LECT = lecture LGCL = language classes ONLN = online learning PERF = performance PRAC* = practicum REEV = research evaluation RESP = research paper REVP = review paper SEMR = seminar STDO = studio THES = thesis TUTR = tutorial WKSP = workshop	ⓘ *INSP and PRAC are excluded from using the Withdrawal (W) option as per Senate Policy. All other instructional Types are available for online Withdrawl.
	Y	**Grp** (Group Number)	01, 02, 03 etc.	Number for the meet. For a course with a LECT and multiple TUTR, the LECT would be 01, and the first tutorial would also be 01. The second tutorial would be 02.
	Z	**Req** (Frequency)	W = Weekly M = Monthly F = Fortnightly (every 2 weeks)	Indicates the frequency of the meet being taught. ⓘ For courses offered **monthly or fortnightly**, the specific dates must be added to the Notes column (Column AS).
	AA	**Campus**	YK, GL, OC	Location (campus) where meet is offered. YK = Keele campus GL = Glendon campus OC = Off Campus
	AB	**Lang Meet** (Language of Instruction of Meet)	EN, FR etc.	Primary language of the meet.
	AC	**Max Enr** (Maximum Enrolment)	100, 25 etc.	Total number of students allowed to enroll in the meet. ⓘ Multiple meets (within a section), must add up to the section maximum.
	AD	**Targ Enr** (Target Enrolment)	100, 25 etc.	Target number of students allowed to enroll in the meet. ⓘ If you have multiple meets (within a section), make sure that they all add up to match the section target.

	Column	Column Title	Spreadsheet Update Options/Examples	Explanation
Meet Information	**AE**	**Day** (Day of Week)	M = Monday T = Tuesday W = Wednesday R = Thursday F = Friday S = Saturday U = Sunday SU = Saturday and Sunday	Day of the week when the meet is taught. If the course doesn't meet (e.g. internet courses), leave this field blank. If the course is taught over several days (e.g. M, W and F) put each day on a different row in Excel.
	AF	**Hour**	8:30, 13:00 etc.	Based on the 24hour clock, the start of the meet, on the hour or the half-hour.
	AG	**Dur** (Duration)	30, 60, 180 etc.	The duration (in minutes) of the meet.
	AH	**Book Prio** (Room Booking Priority)	Note: If a change is required, a reason MUST be indicated in the Notes Column (Column AS) on the far-right side of the spreadsheet.	**0 = No Room Required**. **1 = Back-Up Sections/Tutorials.** **2 = Non-RAC Room** If arranging for a departmental room, you must ensure you have agreement with the booking office of the room prior to submitting to the Office of the University Registrar. The room must be listed in the Notes column. **3 = Taught With or Integrated in a Rac Room** (more than one course taught in same room). In the Notes column, the course it is "taught with" **MUST** be specified. **5 = Taught With in a Non Rac Room** (more than one course taught in same departmental room). In the Notes column, the course it is "taught with" **MUST** be specified and provide the Non Rac room that has been arranged. **7 = Medical Requests** MUST be submitted with your original offerings, accompanied with the name of the course instructor. This information is to be added in the Notes column (Column AS). Medical documentation is not to be submitted to the Office of the University Registrar but must be on file at the Department or Faculty. If a Medical Priority is no longer required, indicate its removal in the Notes column. **9 = Keystone** Where a course is considered critical to student progression and/or preparation, it should be prioritized within the schedule for room allocation. Clarification on the course will be required from the faculty during the scheduling process where prioritization within a time block may be in question.

	Column	Column Title	Spreadsheet Update Options/Examples	Explanation
Room Requirement Information	**AI**	Rm R1 (Room Requirement)	Enter only the number that corresponds to the appropriate room requirement.	**Valid Room Requirements:** 4 – Room, Language Class Suitable 10 – Continuous Writing Surface 21 – Furniture, Lectern/Podium 25 – Windows 26 – Blackout Drapes/Blinds 27 – Chalkboard 28 – Extra Chalkboard 40 – Manual Projection Screen 43 – Cinema Grade Projector 46 – TV Display 49 – Dimmer Switch 66 - Dual Projection 69 – Video Camera (Video Streaming) 70 - Piano 72 - Document Camera 76 - Single Proector 85 – Electric Projection Screen 91 – Camtasia 95 - Crestron Touch Control 96 - PC Audio Recording 📣 Incorrect or conflicting requests will result in unplaced courses. ONLY these requirements will be considered, if not coded, the required AV may not be available. 📣 Room availability is also restricted by room capacity.
	AJ	Rm R2		
	AK	Rm R3		
	AL	Rm R4		
	AM	Rm R5		
	AN	Rm R6		
	AO	Rm R7		
	AP	Rm R8		
	AQ	Rm R9		
	AR	Rm R10		
Notes	**AS**	Notes	Enter any additional information that is relevant to the scheduling process.	Provide details of monthly and fortnightly meetings from Column Z (Meeting Frequency). Provide details of Medical (7), Integrated or Taught-With (3) and Non-RAC rooms (2) from Column AH (Booking Priority). Provide course Taught With or Integrated with. (If not provided the 3 or 5 WILL BE REMOVED causing incorrect room placements). Room requirements that can be coded as per column AI to AK will not be considered if listed as a Note.

Comparing the Spreadsheet Columns to COS

Accessing the Course Offering System (COS)

COS is accessed through the Citrix Receiver. Visit Set Up SIS Applications Using Citrix Receiver, at Computing for Faculty and Staff, for installation instructions.

COS can be used to find information needed to complete the spreadsheet such as the **Seq Crs View number (Column B)**. See scenario 2: Adding a course NOT currently on the Initial Offering (IOF) Spreadsheet for an example of how COS and the spreadsheet can be used together.

By using the course **AP HREQ 1880 Cr=6.00 [F09-W10 F AP]** as an example, Figures 2, 3 and 4 illustrate how to match the columns of the Initial Offerings (IOF) Spreadsheet to information found in COS.

1. Course Offering Information: **Comparing the spreadsheet Columns (C - Q) to COS**

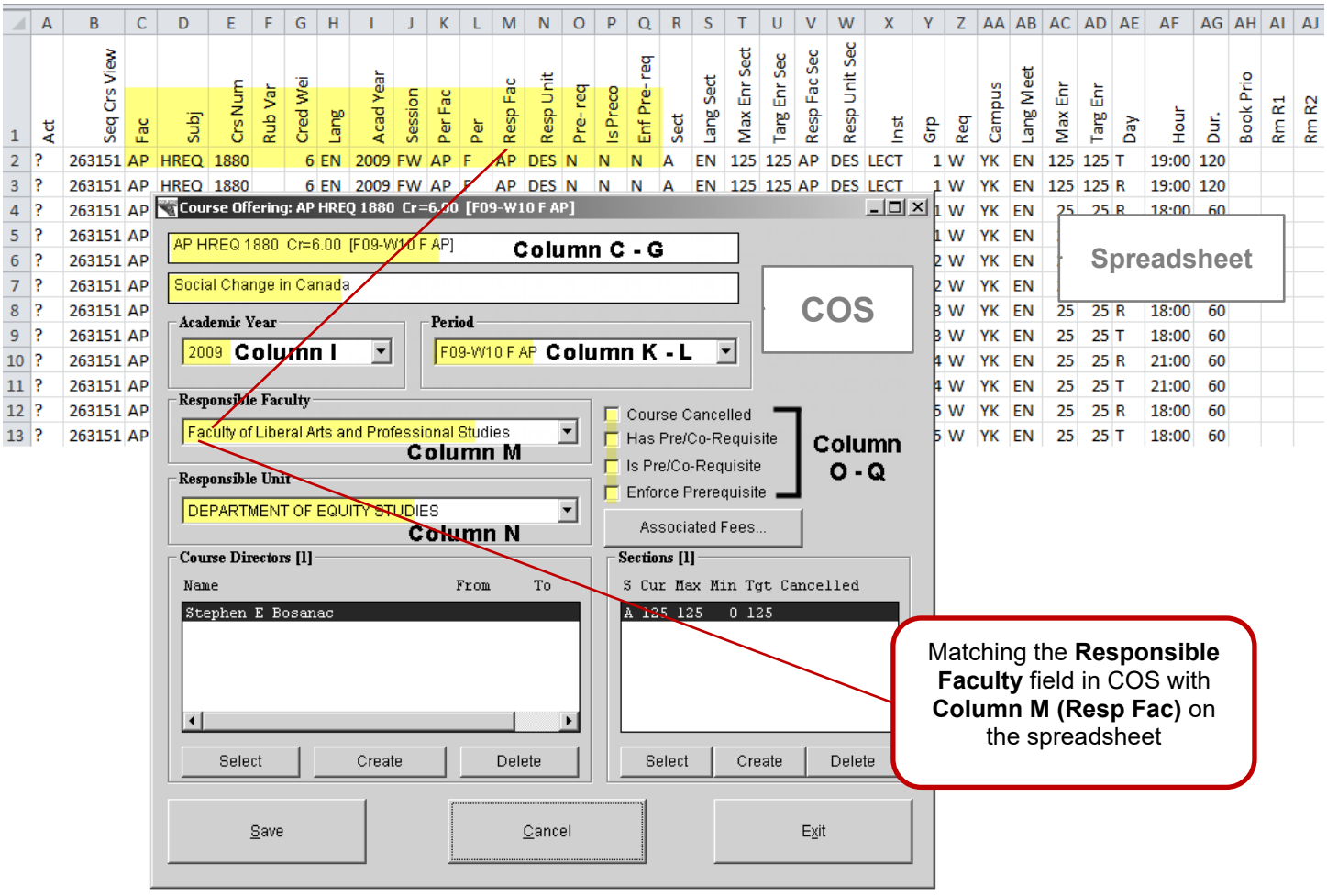


Figure 2: Comparing the Initial Offering (IOF) Spreadsheet to COS - Columns (C - Q)

2. Course Section Information: **Comparing the spreadsheet Columns (R - W) to COS**

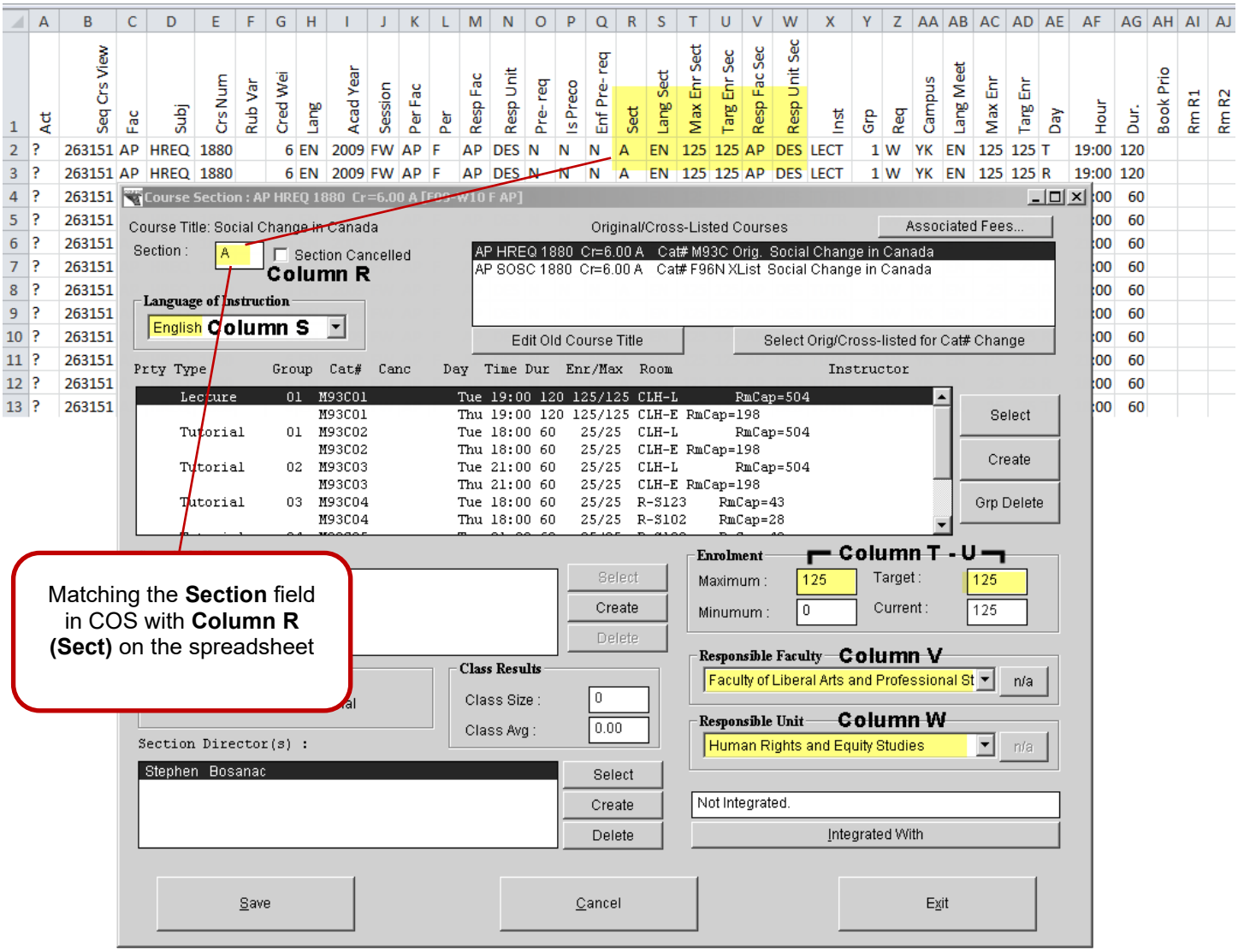


Figure 3: Comparing the Initial Offering (IOF) Spreadsheet to COS - Columns (R - W)

3. Course Meet Information: **Comparing the spreadsheet Columns (X - AR) to COS**

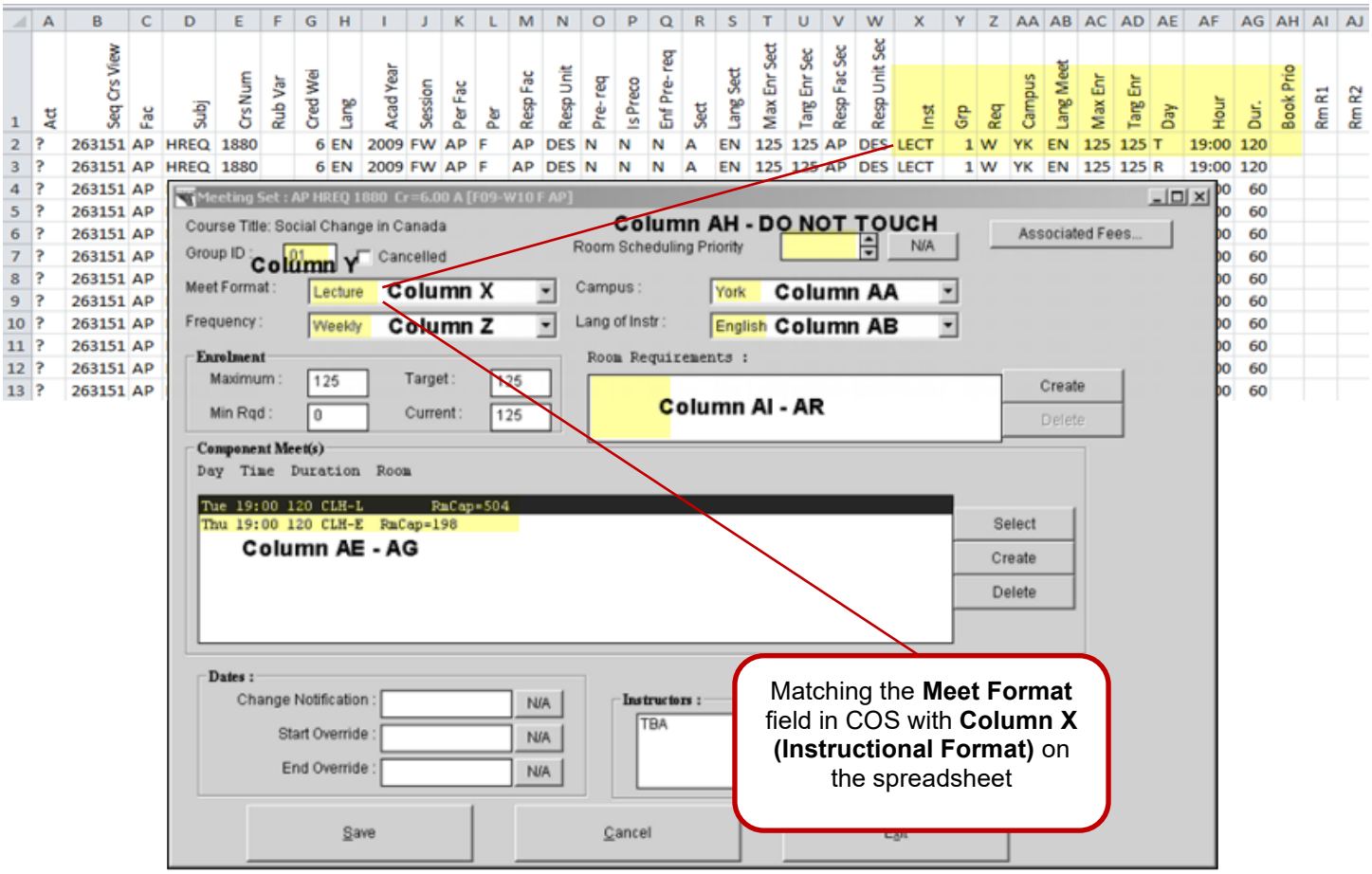


Figure 4: Comparing the Initial Offering (IOF) Spreadsheet to COS - Columns (X - AR)

Adding/Updating/Deleting Information on the Spreadsheet–the INITIAL Submission

Dates and Deadlines

For dates and deadlines concerning updating the Initial Offering (IOF) Submission, please refer to p. 4, 5.

Making changes to the Initial Offerings (IOF) Spreadsheet

In the downloaded spreadsheet you have an exact copy of what was offered in SU2021 or what is currently being offered for FW2021-2022. The next step is to adjust the file so that it reflects what is intended to be offered in SU2022 or FW2022-2023. There are three types of changes:

1. **ADD** new information (e.g. create an additional tutorial/section/course).
2. **UPDATE** existing information (e.g. adjust enrolment maximums, change meeting days).
3. **DELETE** information or lines from the spreadsheet if a course, section or tutorial will not be offered in SU2022 or FW2022-2023.

Scenario 1: Adding an Additional Meet

Example: instead of offering a three-hour lecture on Thursdays, the course changes to a two-hour lecture on Thursdays, and a one-hour lecture on Tuesdays.

1. Change the 180 duration for Thursdays to 120 duration and highlight it in red font
2. Select and **Copy** the entire row of the current Thursday meet. Choose **Insert Copied Cells** and the new row will be added to the spreadsheet. Change the Thursday to Tuesday and change the 180 duration to 60. Highlight this new row in red font.

Original:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ
Act	Seq Crs View	Fac	Subj	Crs Num	Rub Var	Cred Wei	Lang	Acad Year	Session	Per Fac	Per	Resp Fac	Resp Unit	Pre- req	Is Preco	Enf Pre- req	Sect	Lang Sect	Max Enr Sect	Targ Enr Sec	Resp Fac Sec	Resp Unit Sec	Inst	Grp	Req	Campus	Lang Meet	Max Enr	Targ Enr	Day	Hour	Dur.	Book Prio	Rm R1	Rm R2
A	288058	AP	ADMS	1500		3	EN	2021	SU	AP	SU	AP	ADMS	N	Y	N	A	EN	100	100	AP	ADMS	LECT	1	W	YK	EN	100	100	R	19:00	180		66	72

After Update:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ
Act	Seq Crs View	Fac	Subj	Crs Num	Rub Var	Cred Wei	Lang	Acad Year	Session	Per Fac	Per	Resp Fac	Resp Unit	Pre- req	Is Preco	Enf Pre- req	Sect	Lang Sect	Max Enr Sect	Targ Enr Sec	Resp Fac Sec	Resp Unit Sec	Inst	Grp	Req	Campus	Lang Meet	Max Enr	Targ Enr	Day	Hour	Dur.	Book Prio	Rm R1	Rm R2
A	288058	AP	ADMS	1500		3	EN	2021	SU	AP	SU	AP	ADMS	N	Y	N	A	EN	100	100	AP	ADMS	LECT	1	W	YK	EN	100	100	T	19:00	60		66	72
A	288058	AP	ADMS	1500		3	EN	2021	SU	AP	SU	AP	ADMS	N	Y	N	A	EN	100	100	AP	ADMS	LECT	1	W	YK	EN	100	100	R	19:00	120		66	72

Adding an Additional Section with Multiple Meets

Adding an additional section will often mean that you need to add multiple meets for a course taught over several days and/or with multiple meet types (e.g. LECT and TUTR).

If you are copying the structure of an existing section, it is best to copy all of the rows for the existing section and insert them into the spreadsheet. Then, change the section letter for all of the new rows, and make any necessary modifications.

Scenario 2: Adding a Course NOT currently on the Initial Offering (IOF) Spreadsheet

Instead of copying and pasting the existing information as in the previous scenario, refer to the Course Offering System (COS) and manually type in the new course identification on the spreadsheet.

Follow these steps to locate the necessary information in COS:

1. Log into the Course Offering System (COS).
2. Choose **Mode** > **Course Repository** > **List Courses** / **Create Offerings**.
3. The **List of Approved and Provisional Courses** screen will open.

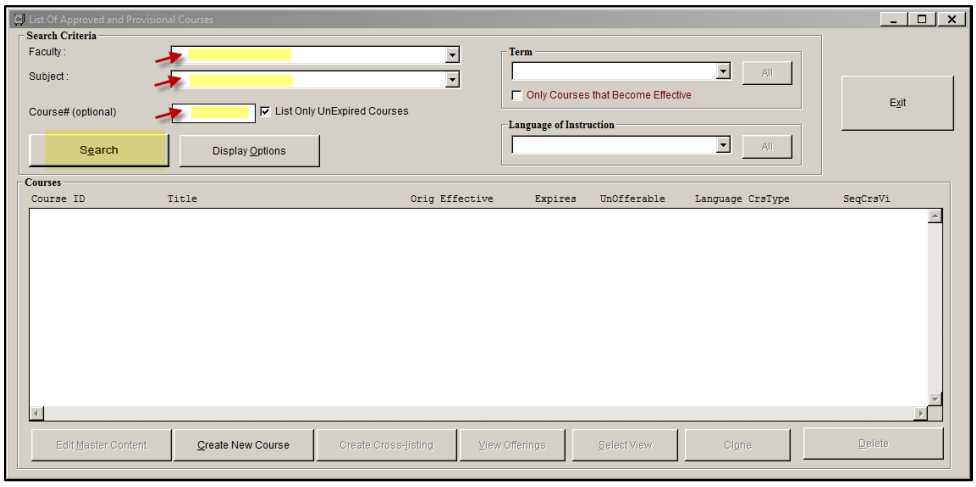


Figure 5: COS List of Approved and Provisional Courses screen

4. Choose the **Faculty**, **Subject** and **Course Number** for the course that you want to offer (see Figure 7).
   - Note: if the course is cross-listed, you must look up the original course information.
5. Click the **Search** button.
   - If no courses appear, the course has not been created in the repository. Contact your Faculty's repository officer for more information.
6. Check the search results.
   - If the **Orig** column says *Orig*, you have selected the correct course. If the **Orig** column says *Xlist*, you have selected the cross-listed course ID and you must modify your search to retrieve the Original course ID.
   - If you do not know the Original course ID, click on the **Edit Master Content** button. The screen that opens will show you the Original course, plus all cross-listings. Close the window, and search for the course again, using the Original course information.
7. Scroll to the right of the search results to view the 6 to 8-digit **SeqCrsVi** (Sequential Course View) number.

TIP: Maximize this window on your screen (see the red arrow in Figure 8) to reduce the need for scrolling and to maintain the alignment of the information in the columns with the column titles.

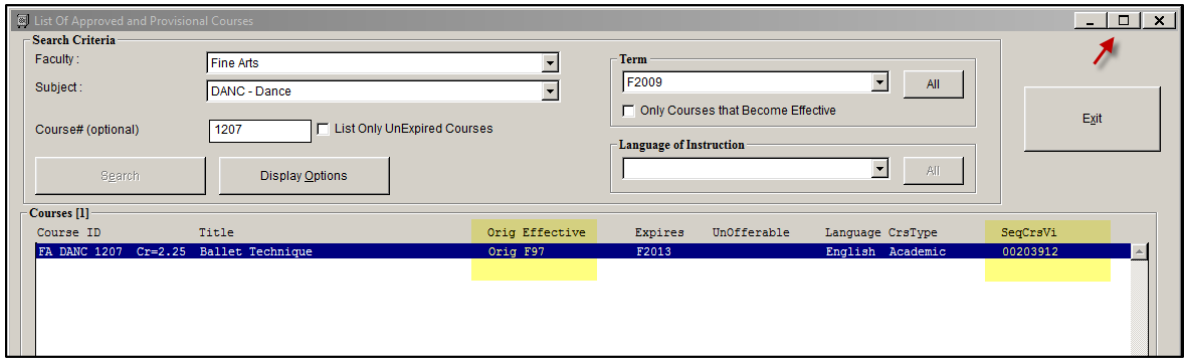


Figure 6: COS List of Approved and Provisional Courses screen - (SeqCrsVi)

8. Enter the **SeqCrsVi** number into **Column B** of the spreadsheet.

   Do not leave **Column B** blank. If a **SeqCrsVi** number is NOT indicated, the spreadsheet cannot be uploaded, and it will be returned to you.

9. Fill in the Initial Offering (IOF) Spreadsheet **Columns C-G** with the **Course ID** information from COS (highlighted in yellow in Figure 9) for the Original course. Any inquiries regarding this view are to be directed to the Course Offering Repository Officer and NOT the Office of the University Registrar.

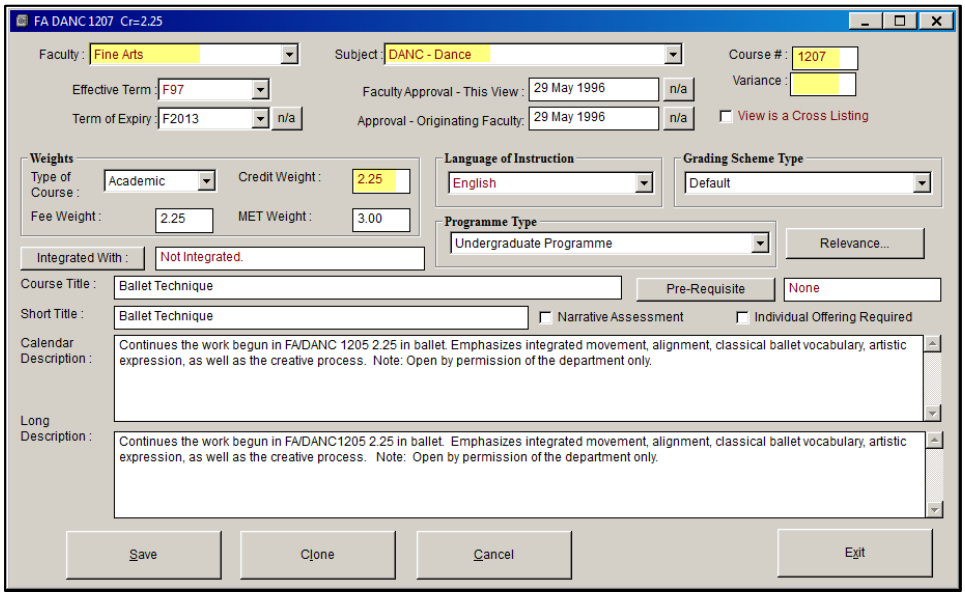


Figure 7: COS – Course ID information

10. Fill in **Column H** on the spreadsheet with the **Language of Instruction** indicated in COS.

11. **Columns I** to the end of the spreadsheet represent the course offering, section and meet information. Copy the information from a similar course and make any necessary adjustments.

If you have a course that is either pending approval or has not been added to the course repository DO NOT include it in your spreadsheet submission. In this case, follow up with your Faculty repository officer.

Scenario 3: Updating the Academic Year

Column I on the Spreadsheet must be changed to Academic Year 2021 for SU2022 offerings, or Academic year 2022 for FW2022-2023 offerings.

You have downloaded files of the current years (SU 2021 or FW 2021-2022) course offerings. You will be submitting these files to upload into SU 2022 and FW 2022-2023. To update the year, change the information in Column I (Academic Year) using YYYY format. This is mandatory. If you don't make this adjustment, the courses will be uploaded into the current session.

Original:

For **ALL** courses included in the INITIAL submission of the spreadsheet remove the "**?**" and add an "**A**" for add (Column A).

Update the Academic Year (Column I) to reflect your current offering

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Act	Seq Crs View	Fac	Subj	Crs Num	Rub Var	Cred Wei	Lang	Acad Year	Session	Per Fac	Per	Resp Fac	Resp Unit	Pre- req	Is Preco	Enf Pre- req	Sect
?	286222	AP	ECON	1000		3	EN	2020	SU	AP	S1	AP	ECON	N	N	N	A
?	286222	AP	ECON	1000		3	EN	2020	SU	AP	S1	AP	ECON	N	N	N	A
?	286222	AP	ECON	1000		3	EN	2020	SU	AP	S2	AP	ECON	N	N	N	M
?	286222	AP	ECON	1000		3	EN	2020	SU	AP	S2	AP	ECON	N	N	N	M
?	286222	AP	ECON	1000		3	EN	2020	SU	AP	S2	AP	ECON	N	N	N	N
?	286222	AP	ECON	1000		3	EN	2020	SU	AP	S2	AP	ECON	N	N	N	N

After Update:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Act	Seq Crs View	Fac	Subj	Crs Num	Rub Var	Cred Wei	Lang	Acad Year	Session	Per Fac	Per	Resp Fac	Resp Unit	Pre- req	Is Preco	Enf Pre- req	Sect
A	286222	AP	ECON	1000		3	EN	2021	SU	AP	S1	AP	ECON	N	N	N	A
A	286222	AP	ECON	1000		3	EN	2021	SU	AP	S1	AP	ECON	N	N	N	A
A	286222	AP	ECON	1000		3	EN	2021	SU	AP	S2	AP	ECON	N	N	N	M
A	286222	AP	ECON	1000		3	EN	2021	SU	AP	S2	AP	ECON	N	N	N	M
A	286222	AP	ECON	1000		3	EN	2021	SU	AP	S2	AP	ECON	N	N	N	N
A	286222	AP	ECON	1000		3	EN	2021	SU	AP	S2	AP	ECON	N	N	N	N

Figure 80: Updating the Initial Offering (IOF) Spreadsheet

Scenario 4: Updating the Meet time

Original:

R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG
Sect	Lang Sect	Max Enr Sect	Targ Enr Sec	Resp Fac Sec	Resp Unit Sec	Inst	Grp	Req	Campus	Lang Meet	Max Enr	Targ Enr	Day	Hour	Dur.
A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	W	8:45	90
A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	T	8:45	90
A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	M	8:45	90
A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	R	8:45	90

Figure 9: Initial Offering (IOF) Spreadsheet

In this example, the start time for this offering was 8:45am, however, the start time will be changed to 8:00am.

Please refer to Appendix A: **Block Schedules** for scheduling options.

After Update:

R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG
Sect	Lang Sect	Max Enr Sect	Targ Enr Sec	Resp Fac Sec	Resp Unit Sec	Inst	Grp	Req	Campus	Lang Meet	Max Enr	Targ Enr	Day	Hour	Dur.
A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	W	8:00	90
A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	T	8:00	90
A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	M	8:00	90
A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	R	8:00	90

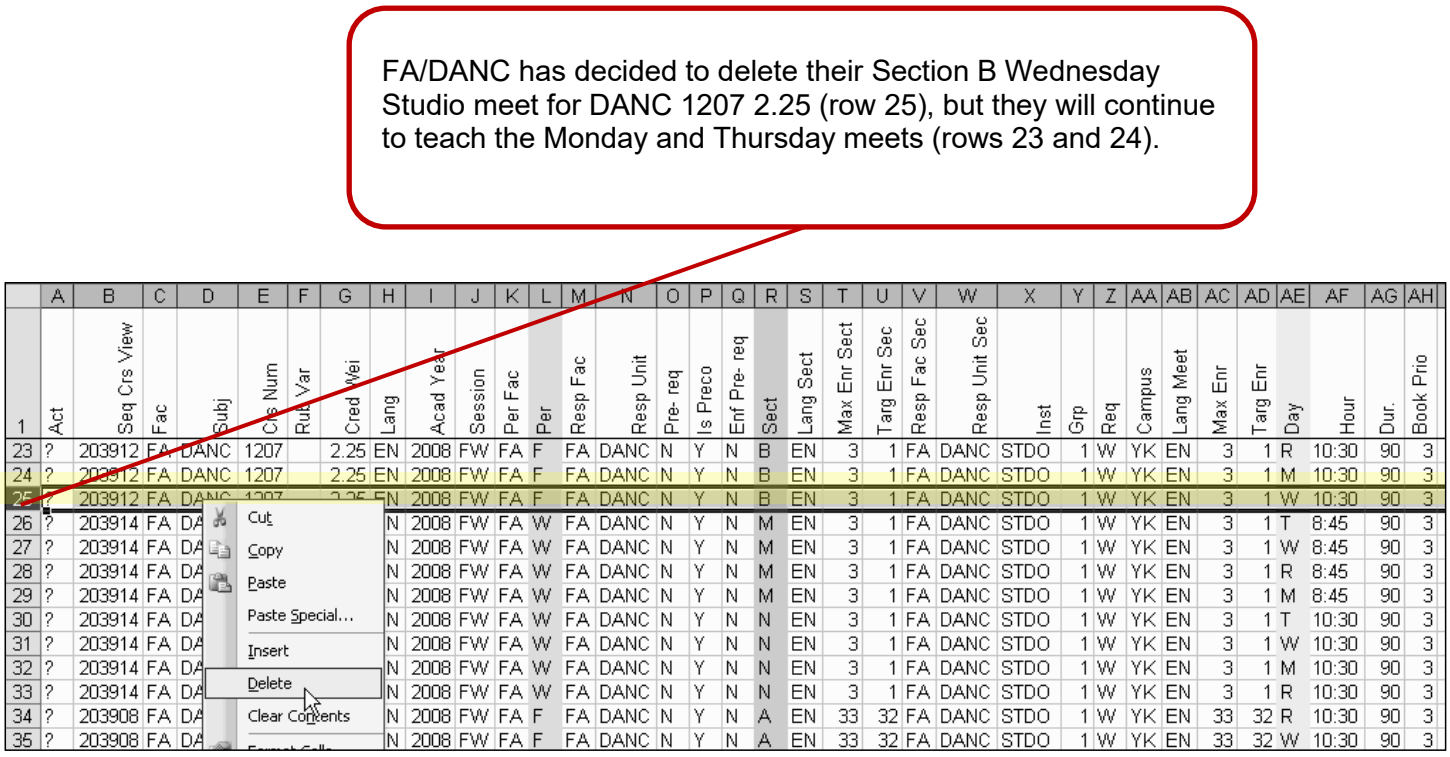
Figure 10: Updating the Initial Offering (IOF) Spreadsheet - updating the meet time (Column AF)

Scenario 5: Deleting a Meet / Section / Course

If you want to remove a meet, section or course, then delete it entirely from the spreadsheet.

1. Highlight the entire row by clicking on the row number at the far-left side of the spreadsheet.
2. Right click on the highlighted row. A popup menu will appear.
3. Choose **Delete** from the popup menu. The highlighted row will disappear.
4. Continue row by row until all of the information has been deleted.

ⓘ If you're deleting an entire section, make sure that you don't leave a meet remaining on the spreadsheet. For example, if the lecture (LECT) was previously offered on M, W, F, it will have three rows on the spreadsheet. You must delete all three rows.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	Act	Seq Crs View	Fac	Subj	Crs Num	Rule Var	Cred Wei	Lang	Acad Year	Session	Per Fac	Per	Resp Fac	Resp Unit	Pre- req	Is Preco	Enf Pre- req	Sect	Lang Sect	Max Enr Sect	Targ Enr Sec	Resp Fac Sec	Resp Unit Sec	Inst	Grp	Req	Campus	Lang Meet	Max Enr	Targ Enr	Day	Hour	Dur.	Book Prio
23	?	203912	FA	DANC	1207		2.25	EN	2008	FW	FA	F	FA	DANC	N	Y	N	B	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	R	10:30	90	3
24	?	203912	FA	DANC	1207		2.25	EN	2008	FW	FA	F	FA	DANC	N	Y	N	B	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	M	10:30	90	3
25	?	203912	FA	DANC	1207		2.25	EN	2008	FW	FA	F	FA	DANC	N	Y	N	B	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	W	10:30	90	3
26	?	203914	FA	DA				N	2008	FW	FA	W	FA	DANC	N	Y	N	M	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	T	8:45	90	3
27	?	203914	FA	DA				N	2008	FW	FA	W	FA	DANC	N	Y	N	M	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	W	8:45	90	3
28	?	203914	FA	DA				N	2008	FW	FA	W	FA	DANC	N	Y	N	M	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	R	8:45	90	3
29	?	203914	FA	DA				N	2008	FW	FA	W	FA	DANC	N	Y	N	M	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	M	8:45	90	3
30	?	203914	FA	DA				N	2008	FW	FA	W	FA	DANC	N	Y	N	N	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	T	10:30	90	3
31	?	203914	FA	DA				N	2008	FW	FA	W	FA	DANC	N	Y	N	N	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	W	10:30	90	3
32	?	203914	FA	DA				N	2008	FW	FA	W	FA	DANC	N	Y	N	N	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	M	10:30	90	3
33	?	203914	FA	DA				N	2008	FW	FA	W	FA	DANC	N	Y	N	N	EN	3	1	FA	DANC	STDO	1	W	YK	EN	3	1	R	10:30	90	3
34	?	203908	FA	DA				N	2008	FW	FA	F	FA	DANC	N	Y	N	A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	R	10:30	90	3
35	?	203908	FA	DA				N	2008	FW	FA	F	FA	DANC	N	Y	N	A	EN	33	32	FA	DANC	STDO	1	W	YK	EN	33	32	W	10:30	90	3

Figure 11: Updating the Initial Offering (IOF)Spreadsheet - deleting a meet

Submitting Course Notes Online

Overview
A course note can be mounted against any course if there is information students should know when enrolling (e.g. the class has irregular class meets, auditions, special instructions for labs, etc.)
The academic scheduling staff is not responsible for mounting course notes for your offerings. All course notes must be submitted through the online Course Notes Submission Form only.

Dates and Deadlines
For dates and deadlines concerning Online Course Notes, please refer to p. 4, 5.

Go to http://intranet.registrar.yorku.ca/policies/notes/ Complete the Course Notes Submission Form.

If you want to submit one note for one course section, choose "an individual course note".

If you want to multiple notes for multiple course sections, choose "bulk course notes".
Please attach a file (saved in a comma-delimited *.csv* file format) containing ONLY the following data columns highlighted in yellow (see Figure 14).
Click Submit

	A	B	C	D	E	F
1	SeqCrsView	Responsible Faculty	Academic Year	Course Period	Course Section	Course Note
2	234476	FA	2014	F	A	Lab 04 is for non-majors only
3	234476	FA	2014	F	G	Sheridan-Trafalgar
4	241159	FA	2014	W	M	Lab 04 is for non-majors only

Figure 12: Bulk Course Notes - Excel Spreadsheet Format

Is the **SeqCrsView** still valid?
You can verify this number in COS

Include the **Academic Year,** NOT the Calendar Year

Room assignments cannot be submitted as a course note without discussion with the Scheduling Office.

Inquiries

If you have problems uploading your Course Notes, please contact crsnotes@yorku.ca

If you have questions about your courses, please contact acadschd@yorku.ca

Confirmation of Offering (COF) Spreadsheet

Overview
Once the SU2022 and FW2022-2023 offerings for all Faculties have been processed and placed, departments can cross-check their course offerings using the **Confirmation of Offering (COF) Report.**

Dates and Deadlines
For dates and deadlines concerning the Confirmation of Offering (COF) Spreadsheet, please refer to p. 4, 5.

Retrieving the Confirmation of Offering (COF) Spreadsheet

1. Go to the Student Information System (SIS) website at www.sis.yorku.ca
   - Click on **Administrative Reports (SRM)** under the **For Administration** section
   - Log in to Passport York (if prompted)
   - Expand the **Courses** button. Click **COF Report**

NOTE: IF YOU DO NOT HAVE ACCESS TO SIS ADMINISTRATIVE REPORTS, PLEASE CONTACT YOUR DIRECT MANAGER.

---

2. Retrieve your current Course Offerings:

Search cells cannot be blank. Use the symbol * if not entering details. See descriptions at the top of the report regarding information required for each search cell.

- To retrieve SU2022 Confirmation of Offerings Spreadsheet (COF), enter the following fields:
  - **Session**: enter SU22 (SSYY format) Session is either FW or SU followed by two-digit **calendar** year.
  - **Faculty**: enter two-character Faculty code.
  - **Subject Code**: enter four-character subject code.
  - **Course Number**: enter four-digit course code.
  - **Period Faculty**: enter period Faculty code.
  - **Responsible Faculty**: enter responsible Faculty code.
  - **Responsible Unit**: enter responsible unit code.
  - Click the **Get Excel Report** button. The report will open in Excel.

- To retrieve FW2022-2023 Confirmation of Offerings Spreadsheet (COF), enter the following fields:
  - **Session**: enter FW22 (SSYY format) Session is either FW or SU followed by two-digit **calendar** year.
  - **Faculty**: enter two-character Faculty code.
  - **Subject Code**: enter four-character subject code.
  - **Course Number**: enter four-digit course code.
  - **Period Faculty**: enter period Faculty code.
  - **Responsible Faculty**: enter responsible Faculty code.
  - **Responsible Unit**: enter responsible unit code.
  - Click the **Get Excel Report** button. The report will open in Excel.

3. Save the file before you begin working on it as an excel spreadsheet.

4. Make your changes to the spreadsheet: Add / Update / Delete information.

5. Review the report and, if necessary, record any concerns/questions.

Sample Confirmation of Offering (COF) Spreadsheet

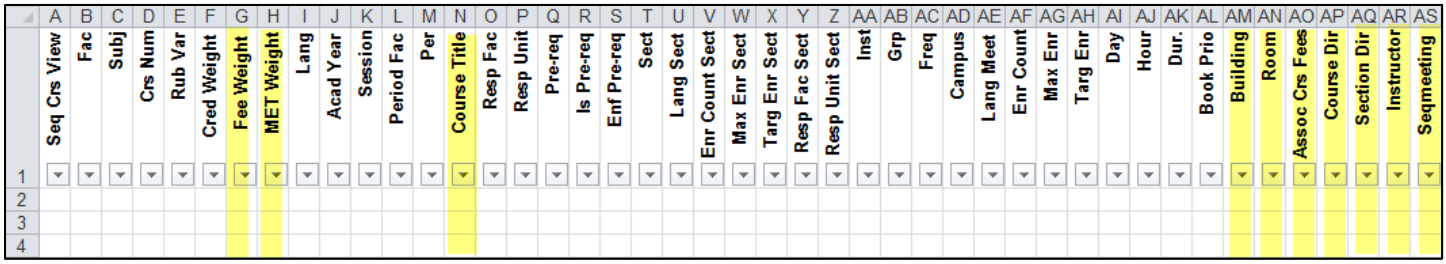


Figure 13: Sample Confirmation of Offering (COF) Spreadsheet

The COF spreadsheet has additional columns of unique information (highlighted in yellow see Figure 15 above) that do not appear on the Initial Offering (IOF) Spreadsheet. As a result, when viewed in Excel, the column letters for the two spreadsheets DO NOT match.

Pay close attention to the following when reviewing the COF Spreadsheet:

- Credit Weight (Column F)
- Period Fac (Column L)
- Section (Column T)
- Day (Column AI), Hour (Column AJ) and Duration (Column AK)
- Maximum Enrolment (Column AG) and Target Enrolment (Column AH)
- Book Priority (Column AL)-ensure that offerings coded as “Medical” have been placed appropriately

6. **If a change or a correction is required, please make the change to the spreadsheet in red font and add a note to the Notes Column (column AU).**

If the offering is complete, indicate "Confirmed" in the Notes Column (Column AU) of the COF spreadsheet. Save the file and send it to acadschd@yorku.ca

DO NOT copy individual Academic Scheduling staff in your e-mail.

A	B	C	D	F	J	K	L	M	T	Y	Z	AA	AB	AC	AG	AH	AI	AJ	AK	AL	AU
Seq Crs View	Fac	Subj	Crs Num	Cred Weight	Acad Year	Session	Period Fac	Per	Sect	Resp Fac Sect	Resp Unit Sect	Inst	Grp	Freq	Max Enr	Targ Enr	Day	Hour	Dur.	Book Prio	NOTES
287861	AP	HUMA	1105	3	2019	FW	AP	F	A	AP	HUMA	LECT	1	W	50	50	W	9:30	60		CONFIRMED
287861	AP	HUMA	1105	3	2019	FW	AP	F	A	AP	HUMA	TUTR	1	W	25	25	F	11:30	120		change day/time to W 10:30
287861	AP	HUMA	1105	3	2019	FW	AP	F	A	AP	HUMA	TUTR	2	W	25	25	W	12:30	120		CONFIRMED
287967	AP	HUMA	3605	3	2019	FW	AP	W	M	AP	HUMA	SEMR	1	W	30	30	T	13:00	90		DELETE
287967	AP	HUMA	3605	3	2019	FW	AP	W	M	AP	HUMA	SEMR	1	W	30	30	R	13:00	90		DELETE
261335	AP	HUMA	3605	6	2019	FW	AP	Y	A	AP	HUMA	SEMR	1	W	30	30	T	16:00	180		CONFIRMED
287952	AP	HUMA	3665	3	2019	FW	AP	F	A	AP	HUMA	SEMR	1	W	30	30	T	11:30	180		CONFIRMED
287921	AP	HUMA	4149	3	2019	FW	AP	W	M	AP	HUMA	SEMR	1	W	20	20	R	8:30	180		CONFIRMED
287976	AP	HUMA	4160	6	2019	FW	AP	Y	A	AP	HUMA	SEMR	1	W	20	20	T	19:00	180		CONFIRMED
287867	AP	HUMA	4190	6	2019	FW	AP	Y	A	AP	HUMA	SEMR	1	W	20	20	R	11:30	180		CONFIRMED
292584	AP	HUMA	4306	6	2019	FW	AP	Y	A	AP	HUMA	SEMR	1	W	20	20	W	16:00	180		CHANGE SESSION TO FALL
286473	AP	HUMA	4416	6	2019	FW	AP	Y	A	AP	HUMA	SEMR	1	W	20	20	W	11:30	180		CONFIRMED
287866	AP	HUMA	4430	6	2019	FW	AP	Y	A	AP	HUMA	SEMR	1	W	20	20	W	14:30	180		CONFIRMED

Explanation of the Columns of the Confirmation of Offering (COF) Spreadsheet

Column	Column Title	Explanation
A	**Seq Crs View**	For information or changes please contact the Course Repository Officer.
B	**Fac**	For information or changes please contact the Course Repository Officer.
C	**Subj**	For information or changes please contact the Course Repository Officer.
D	**Crs Num**	For information or changes please contact the Course Repository Officer.
E	**Rub Var**	For information or changes please contact the Course Repository Officer.
F	**Cred Weight**	For information or changes please contact the Course Repository Officer.
G	**Fee Weight**	For information or changes please contact the Course Repository Officer.
H	**MET Weight**	For information or changes please contact the Course Repository Officer.
I	**Lang**	For information or changes please contact the Course Repository Officer.
J	**Acad Year**	2021 for SU 2022. 2022 for FW 2022-2023.
K	**Session**	Academic Session course is offered.
L	**Period Fac**	Matches Faculty acronym from Column B.
M	**Per**	Sessional dated Period Code for the course.
N	**Course Title**	For information or changes please contact the Course Repository Officer.
O	**Resp Fac**	Responsible Faculty for **ALL** sections of the course.
P	**Resp Unit**	Responsible Unit/Department for **ALL** sections of the course.
Q	**Pre-req**	Y = course has a pre-requisite. N = course does not have a pre-requisite.
R	**Is Pre-req**	Y = course is a pre-requisite. N = course is not a pre-requisite.
S	**Enf Pre-req**	ⓘ If the **Enforce Pre-requisite** flag is checked and the pre-requisite information has not been coded in the repository, then students will not be able to enroll in the course. Y = prevents students who do not meet the pre-requisite from enrolling. N = will not prevent students who do not meet the pre-requisite from enrolling.

<table>
<tr><th>Column</th><th>Column Title</th><th>Explanation</th></tr>
<tr><td>T</td><td>Sect</td><td>
<table>
<tr><th colspan="2">SUMMER</th></tr>
<tr><th>Term</th><th>Section</th></tr>
<tr><td>SU</td><td>A to Z</td></tr>
<tr><td>S1</td><td>A to L</td></tr>
<tr><td>S2</td><td>M to Y</td></tr>
</table>
<table>
<tr><th colspan="2">FALL/WINTER</th></tr>
<tr><th>Term</th><th>Section</th></tr>
<tr><td>F</td><td>A to L</td></tr>
<tr><td>Y</td><td>A to Y</td></tr>
<tr><td>W</td><td>M to Y</td></tr>
</table>
<table>
<tr><th colspan="2">EECS & MATH for LE ENG students</th></tr>
<tr><th>Term</th><th>Section</th></tr>
<tr><td>F</td><td>E</td></tr>
<tr><td>Y</td><td>Z</td></tr>
<tr><td>W</td><td>P</td></tr>
</table>
</td></tr>
<tr><td>U</td><td>Lang Sect</td><td>For information or changes please contact the Course Repository Officer.</td></tr>
<tr><td>V</td><td>Enr Count Sect</td><td>Current Enrolment count.</td></tr>
<tr><td>W</td><td>Max Enr Sect</td><td>Total number of students allowed to enroll in the section.</td></tr>
<tr><td>X</td><td>Targ Enr Sect</td><td>Total number of students allowed to enroll in the section.</td></tr>
<tr><td>Y</td><td>Resp Fac Sect</td><td>Responsible Faculty for all meets for the current section of the course.</td></tr>
<tr><td>Z</td><td>Resp Unit Sect</td><td>Responsible Unit/Department for all meets for the current section of the course.</td></tr>
<tr><td>AA</td><td>Inst</td><td>The acronym for the format of the meet.</td></tr>
<tr><td>AB</td><td>Grp</td><td>Identifier for the meet.</td></tr>
<tr><td>AC</td><td>Freq</td><td>Frequency of the meet being taught.
W = Weekly
M = Monthly
F = Fortnightly (every 2 weeks)</td></tr>
<tr><td>AD</td><td>Campus</td><td>Location (campus) where the meet is offered.
YK = Keele Campus
GL = Glendon Campus
OC = Off Campus</td></tr>
<tr><td>AE</td><td>Lang Meet</td><td>For information or changes please contact the Course Repository Officer.</td></tr>
<tr><td>AF</td><td>Enr Count</td><td>Total number of students allowed to enroll in the meet.</td></tr>
<tr><td>AG</td><td>Max Enr</td><td>Total number of students allowed to enroll in the meet.</td></tr>
<tr><td>AH</td><td>Targ Enr</td><td>Total number of students allowed to enroll in the meet.</td></tr>
</table>

Column	Column Title	Explanation
AI	**Day**	Day of the week when the meet is taught. M = Monday T = Tuesday W = Wednesday R = Thursday F = Friday S = Saturday U = Sunday SU = Saturday and Sunday
AJ	**Hour**	The start of the meet, based on the 24 hour clock.
AK	**Dur.**	The duration (in minutes) of the meet.
AL	**Book Prio**	**Scheduling Priority** 9 = Keystone 7 = Medical 5 = Taught With, Non RAC room 4 = Out of Block 3 = Taught With 2 = Non RAC room 1 = Back-up (see Appendix B) 0 = No Room required
AM	**Building**	Letter code of building
AN	**Room**	Room number
AO	**Assoc Crs Fees**	As per information submitted to Student Financial Services Inquiries: Oana Alexandru, oana_a@yorku.ca.
AP	**Course Dir**	Add through **Academic Resource Management System** (ARMS) at www.yorku.ca/armhelp
AQ	**Section Dir**	Add through **Academic Resource Management System** (ARMS) at www.yorku.ca/armhelp
AR	**Instructor**	Add through **Academic Resource Management System** (ARMS) at www.yorku.ca/armhelp
AS	**Seqmeeting**	Not applicable
AU	**Notes**	Any changes required for Column AC (Freq) or Column AL (Book Prio) must have additional information added to the Notes Column. Provide Non Rac rooms and Taught With/Integrated with courses. Any additional information that should be highlighted should also be included. If the offering is complete, indicate “Confirm”.

Appendix A: Block Schedules

Block Schedules – Courses with No Tutorial

- When scheduling courses, they should be distributed evenly throughout the day and throughout the week.
- Traditionally, there is a tendency for departments to avoid certain time slots (e.g. 8:30, late afternoons and Friday afternoons) and it has become increasingly difficult for the Office of the University Registrar to meet the needs of all departmental scheduling requests.

Note: Block schedule assumes 3 hours of contact (with some exceptions that will have 2 hours scheduled only).
Lectures with tutorials, please refer to the page “Block Schedules – Courses with tutorials”.

ⓘ Courses that adhere to the block scheduling times will be scheduled first. Any courses that are outside of the official block scheduling times will not be placed until all other courses have been scheduled.

1-1-1	
MWF	8:30
MWF	9:30
MWF	10:30
MWF	11:30
MWF	12:30
MWF	1:30
MWF	2:30
MWF	3:30
MWF	4:30
MWF	5:30

1.5–1.5	
MW, WF, MF	8:00 – 9:30
TR	8:30 – 10:00
TR	10:00 – 11:30
MW, MR, TR, TF, WF, MF	11:30 – 1:00
MW, MR, TR, TF, WF, MF	1:00 – 2:30
TR	2:30 – 4:00
MW, MR, TR, TF, WF, MF	4:00 – 5:30
MW, MR, TR, TF, WF, MF	5:30 – 7:00

2	
M, T, W, R, F	8:30 – 10:30
M, W, F	10:30 – 12:30
M, T, W, R, F	12:30 – 2:30
M, T, W, R, F	2:30 – 4:30
M, T, W, R, F	4:30 – 6:30

2-1			
M	8:30 – 10:30	W	8:30 or 9:30
M	8:30 – 10:30	F	8:30 or 9:30
T	8:30 – 10:30	R	8:30 or 9:30
W	8:30 – 10:30	F	8:30 or 9:30
T	12:30 – 2:30	R	12:30 or 1:30
M	2:30 – 4:30	W	2:30 or 3:30
M	2:30 – 4:30	R	2:30 or 3:30
W	2:30 – 4:30	F	2:30 or 3:30

2-2	
MW	8:30 – 10:30
WF	8:30 – 10:30
TR	8:30 – 10:30
MW	10:30 – 12:30
MW	12:30 – 2:30
TR	12:30 – 2:30
WF	12:30 – 2:30
MW	2:30 – 4:30
TR	2:30 – 4:30
WF	2:30 – 4:30
Any combination of 2 days	4:30 – 6:30

3	
M, T, W, R, F	8:30 – 11:30
M, T, W, R, F	11:30 - 2:30
M, T, W, R, F	2:30 – 5:30
M, T, W, R, F	4:00 – 7:00
M, T, W, R, F	7:00 – 10:00

Block Schedules – Courses with Tutorials

- When scheduling courses, they should be distributed evenly throughout the day and throughout the week.
- Traditionally there is a tendency for departments to avoid certain time slots (e.g. 8:30, late afternoon and Friday afternoons) and it has become increasingly difficult for the Office of the University Registrar to meet the needs of all departmental scheduling requests.

ⓘ Courses that adhere to the block scheduling times will be scheduled first. Any courses that are outside of the official block scheduling times will not be placed until all other courses have been scheduled.

1-1	
MW	10:30-11:30
TR	10:30-11:30
MW	11:30-12:30
TR	11:30-12:30
WF	12:30-1:30

2	
M, T, W, R, F	8:30-10:30
M, W, F	10:30-12:30
M, T, W, R, F	12:30-2:30
M, T, W, R, F	2:30-4:30
M, T, W, R, F	4:30-6:30
M, T, W, R, F*	6:00-800 plus 2 hour tutorial*

1.5	
M, W, F	8:00-9:30
T, R	8:30-10:00
T, R	10:00-11:30
M, T, W, R, F	11:30-1:00
M, T, W, R, F	1:00-2:30
T, R	2:30-4:00
M, T, W, R, F	4:00-5:30
M, T, W, R, F	5:30-7:00

ⓘ Lecture hours must follow the Block guidelines. Tutorials (either 1 hour or 2 hours) may be scheduled at any time, on the half hour.

The block schedule assumes that there are three contact hours (2 hours of lecture and a one hour tutorial) with the exception of 9 credit courses which have 4 contact hours (2 hours of lecture, 2 hours of tutorial). A very small number of courses have 1.5 hour lectures and 1.5 hour tutorials. In the latter case, the tutorials MUST be scheduled during a 1.5 hour lecture block.
For courses with one lecture hour and 2 hour tutorials, the lecture may be scheduled at any hour on the half hour.

* The Lecture Block of 6:00pm to 8:00pm is restricted to 9 credit courses with two hours of lecture immediately followed by two hours of tutorial (4 hours total)

Appendix B: “Back-Up” Sections

Courses / Sections / Tutorials on “Back-Up”

1. **On your Initial Offering submissions (IOF) for SU2022 and FW2022-2023, all courses/sections will be considered ACTIVE**.

When the SU2022 and FW2022-2023 spreadsheets are downloaded, any course that was placed on back-up for these sessions will have a Room Scheduling Priority of “1”. Departments **MUST add a MAX and a TARGET** which is greater than 1 to all backup sections from the previous year.

If the **back-up will not be offered for SU2022 or FW2022-2023**, the offering should be deleted on the spreadsheet.

2. **During the Confirmation of Offering (COF) process**, the departments must advise the Office of the University Registrar which offerings are to be placed on back-up. Indicate the back-up request in the Notes Column (Column AU) of the Confirmation of Offering (COF) Spreadsheet and change the Course MAX and Target to “0”.

Ad Astra

Strategic Scheduling Evaluation

Executive Summary Presentation

Diagnostic Survey Results

Stakeholder Interviews Overview

Strategic Scheduling Checkup Results

Lisa Hunter, VP of Education
Christine Stewart, Senior Solutions Consultant
Laura Kelley, VP of Solution Strategy

Agenda

- Project Introduction & Overview
- Infrastructure Review
- Course Scheduling Infrastructure Diagnostic Results
- Stakeholder Meetings Summary
- Strategic Scheduling Checkup Results
  - Course Offerings
  - Capacity
- Recommendations
- Next Steps

Project Overview

- Insert Institution Image, students etc.
- Frankie to introduce/discuss project purpose and partnership with Ad Astra

Course Scheduling Infrastructure

Core features of the institution that facilitate course scheduling *(course scheduling policies, procedures, physical/human/financial/technology resources)*

Course Scheduling Infrastructure Categories

- Student Success
- Sustainability: Enrollment & Financial Health
- Classroom Scheduling
- Student Information System
- Faculty Scheduling
- Course Scheduling Policies & Procedures

Infrastructure Supports a Course Schedule Designed for Completions

Stabilize
Limited Infrastructure

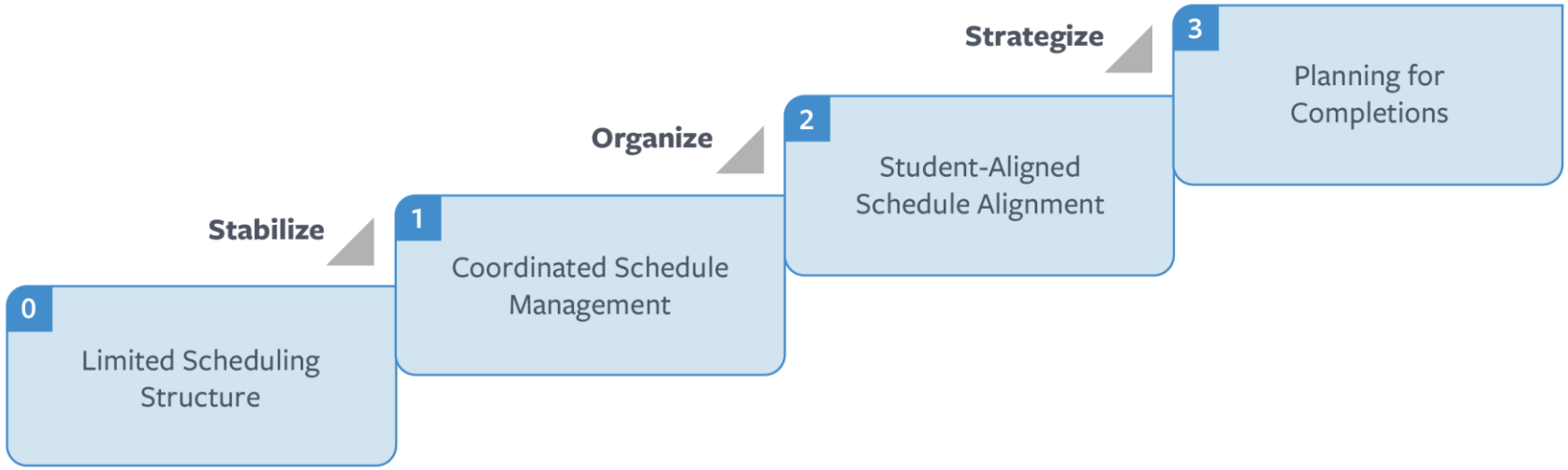
Based on the results of your diagnostic, there is little to no formalized course scheduling infrastructure at the institutional level. Your infrastructure does not yet fully support student success or sustainability. Course scheduling systems may be ad hoc and disjunct. You need to stabilize core aspects of your infrastructure and coordinate course schedule management.

Organize
Basic Infrastructure

Based on the results of your diagnostic, there is basic course scheduling infrastructure at the institutional level. Some elements of the course scheduling infrastructure support student success and sustainability, but improvement is needed. Course scheduling systems are generally organized, but improvement is needed to drive student success and sustainability. You need to organize all aspects of the course scheduling infrastructure and begin aligning the schedule to students' needs.

Strategize
Optimal Infrastructure

Based on the results of your diagnostic, there is optimal course scheduling infrastructure in place at the institutional level. Student success and sustainability drive course scheduling. Most course scheduling systems are organized. You are well positioned to strategize how to better align the course schedule to students' needs and plan for completions.



Assessing Your Course Scheduling Infrastructure Diagnostic Results

York University

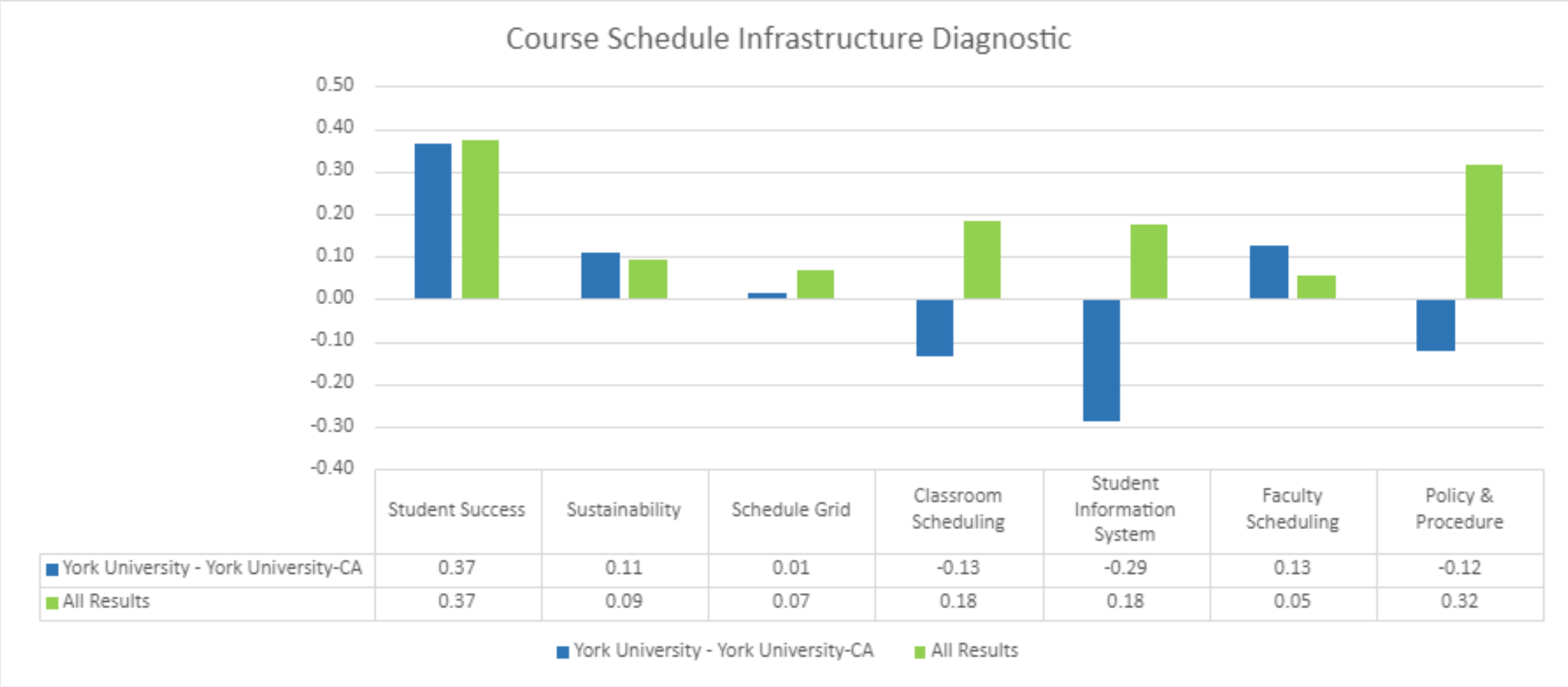
Organize
Basic
Infrastructure

Based on the results of your diagnostic, there is basic course scheduling infrastructure at the institutional level. Some elements of the course scheduling infrastructure support student success and sustainability, but improvement is needed. Course scheduling systems are generally organized, but improvement is needed to drive student success and sustainability. You need to organize all aspects of the course scheduling infrastructure and begin aligning the schedule to students' needs.

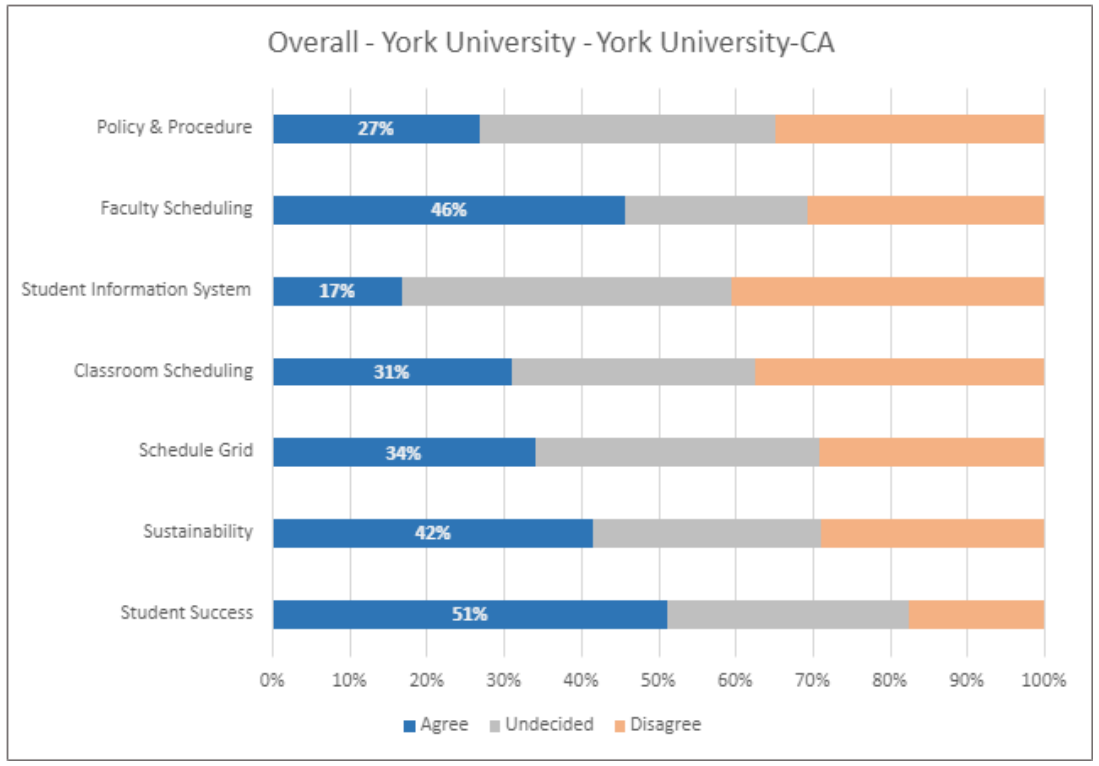
Areas of Greatest Concern:

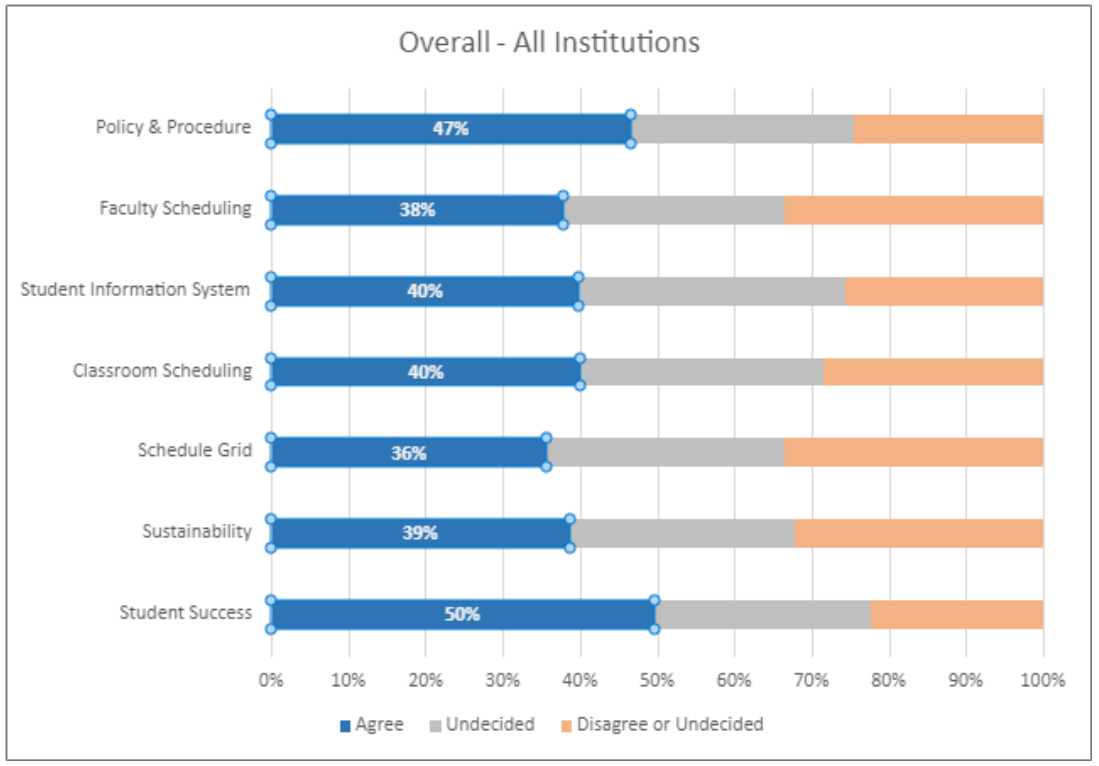
- Student Information System
- Classroom Scheduling
- Policy & Procedure
- Schedule Grid

York University

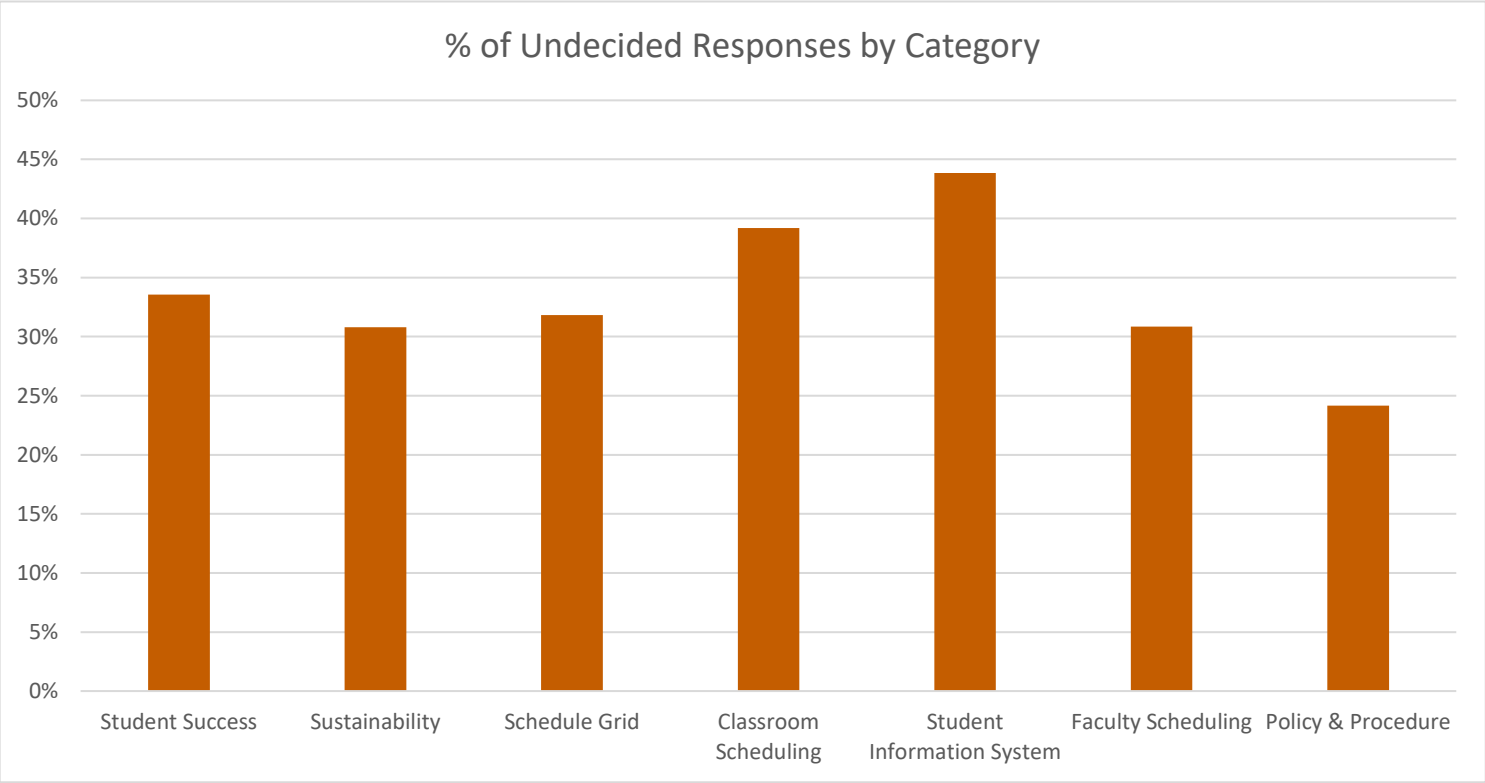


Overall Results



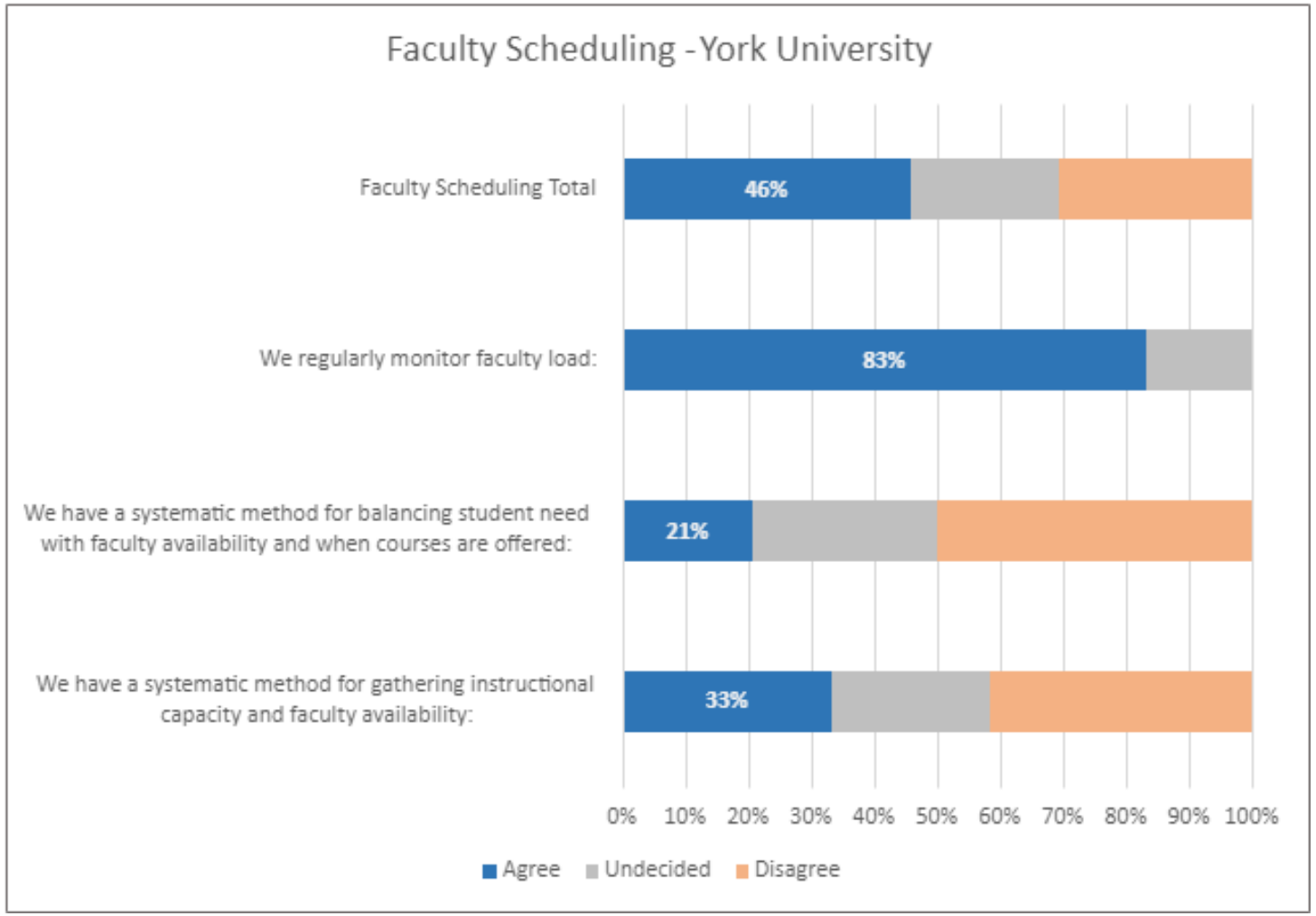


Undecided Responses

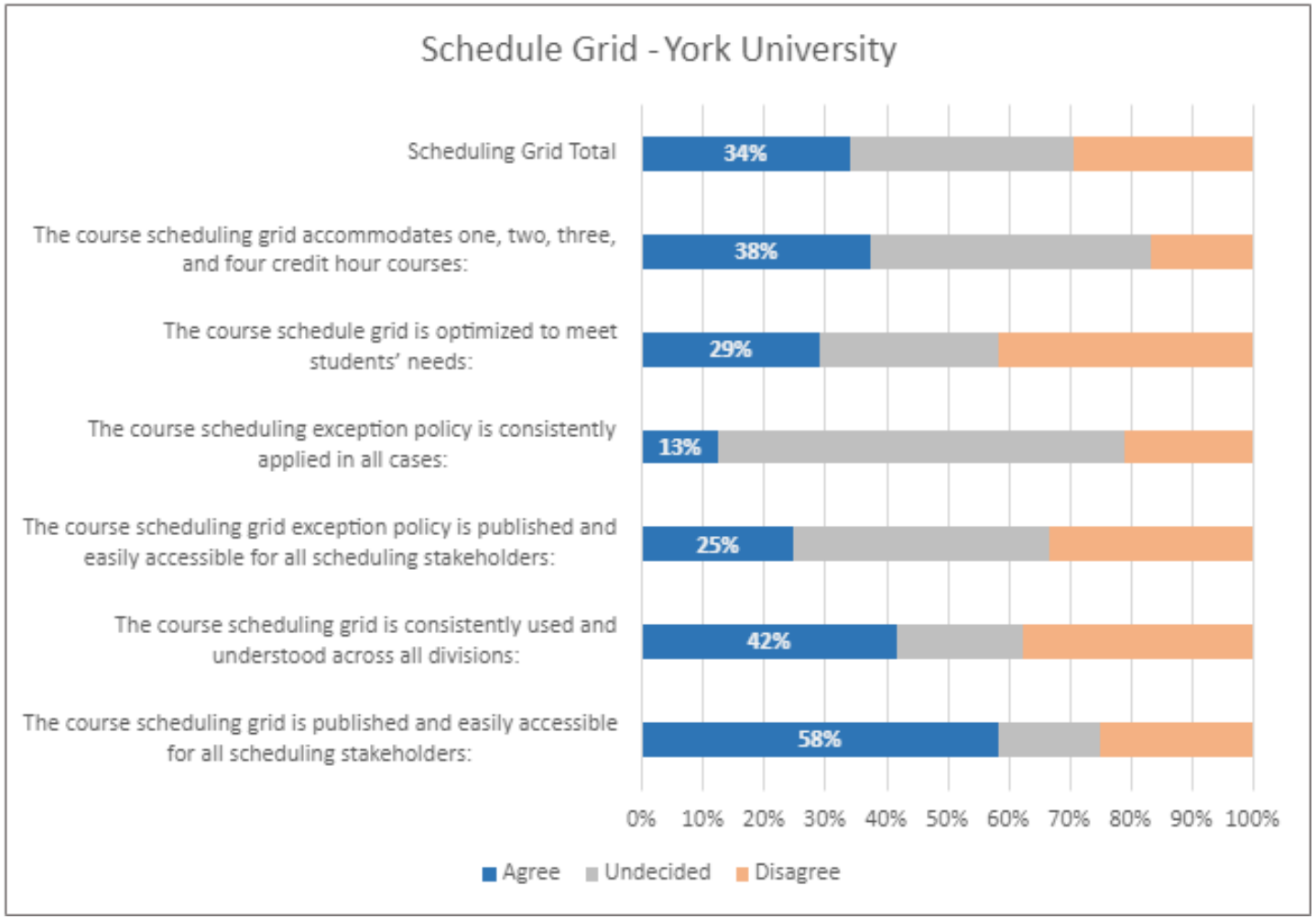


- Impact of ‘undecided’ responses
- Uncertainty in diagnostic statements?
- Communication and collaboration needed to understand these key areas of infrastructure

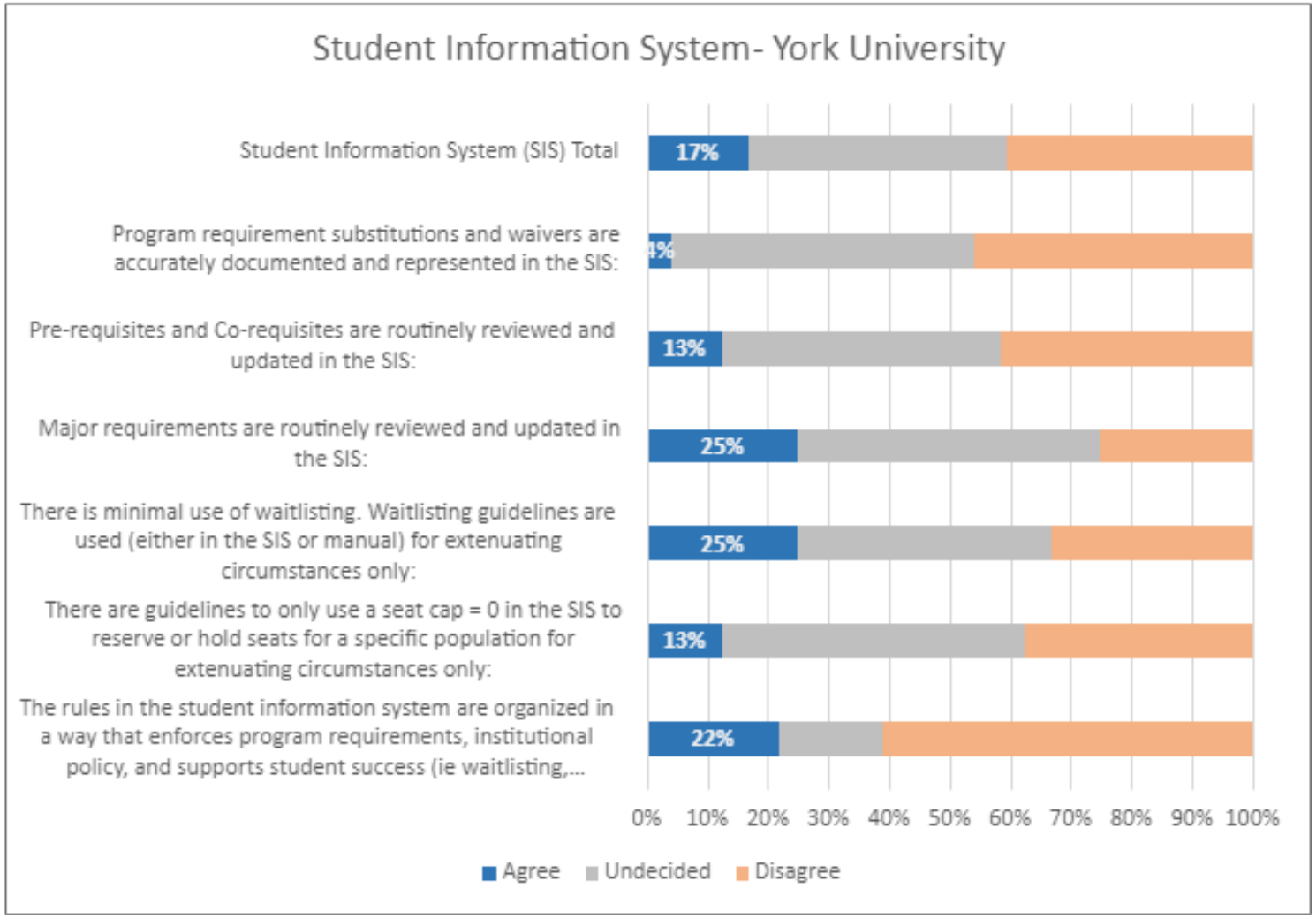
Faculty Scheduling

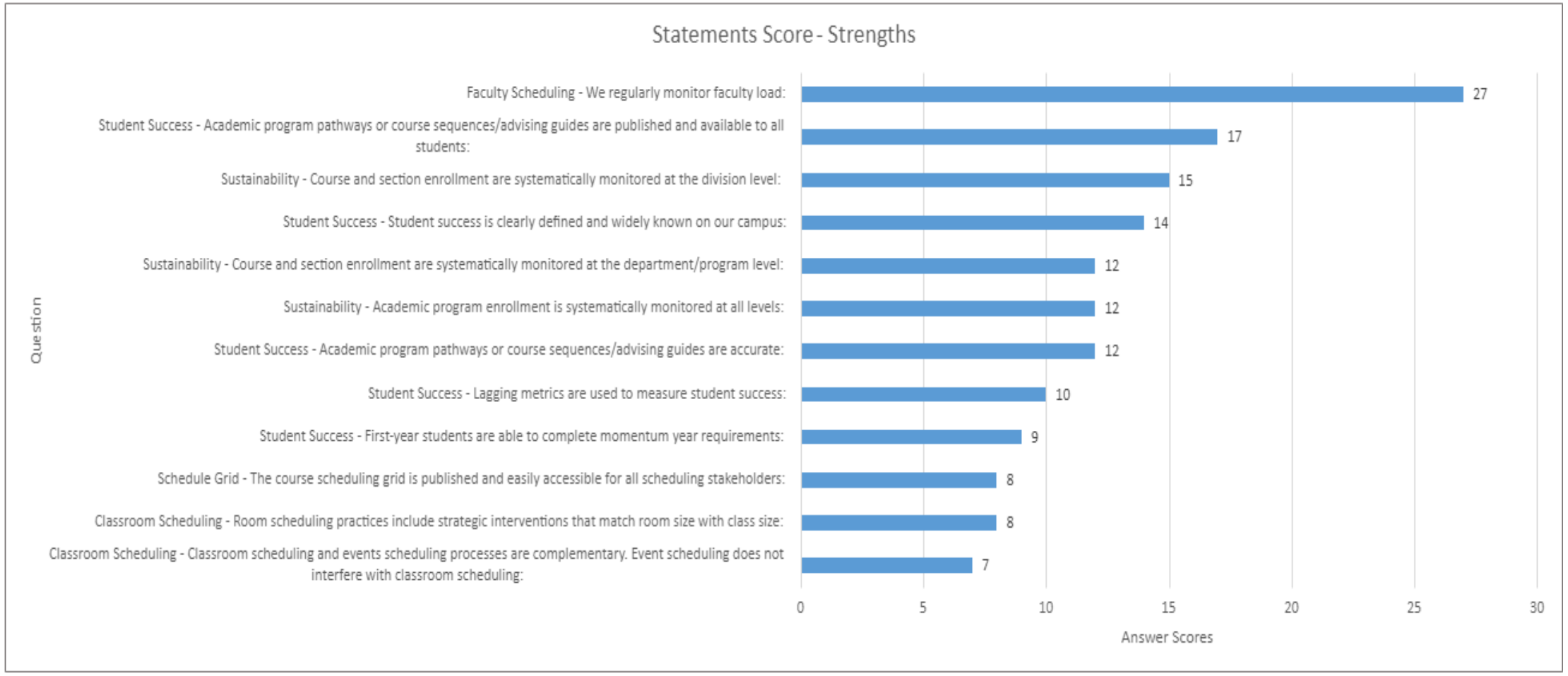


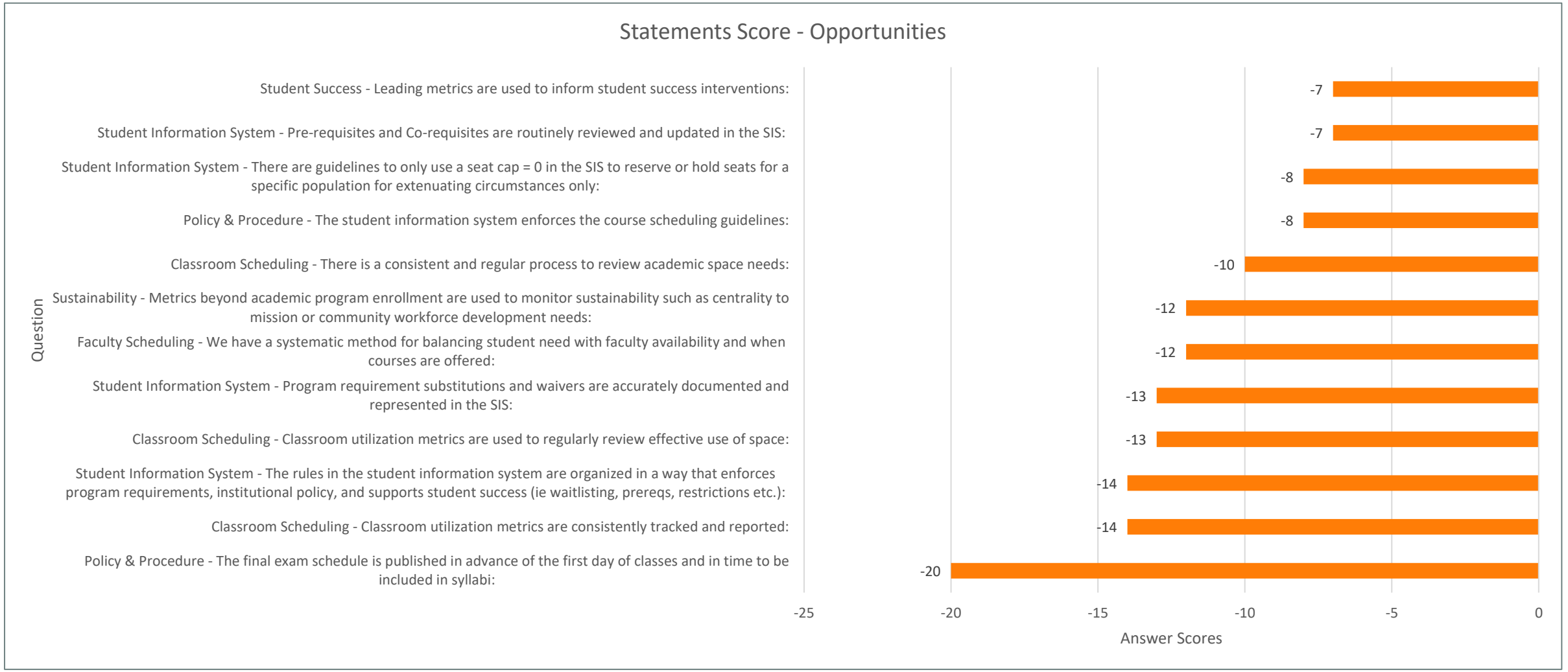
Schedule Grid



Student Information System




Statements Score - Strengths
Faculty Scheduling - We regularly monitor faculty load:
27
Student Success - Academic program pathways or course sequences/advising guides are published and available to all students:
17
Sustainability - Course and section enrollment are systematically monitored at the division level:
15
Student Success - Student success is clearly defined and widely known on our campus:
14
Sustainability - Course and section enrollment are systematically monitored at the department/program level:
12
Sustainability - Academic program enrollment is systematically monitored at all levels:
12
Student Success - Academic program pathways or course sequences/advising guides are accurate:
12
Student Success - Lagging metrics are used to measure student success:
10
Student Success - First-year students are able to complete momentum year requirements:
9
Schedule Grid - The course scheduling grid is published and easily accessible for all scheduling stakeholders:
8
Classroom Scheduling - Room scheduling practices include strategic interventions that match room size with class size:
8
Classroom Scheduling - Classroom scheduling and events scheduling processes are complementary. Event scheduling does not interfere with classroom scheduling:
7
Question
0
5
10
15
20
25
30
Answer Scores


Statements Score - Opportunities
Question
Student Success - Leading metrics are used to inform student success interventions:
Student Information System - Pre-requisites and Co-requisites are routinely reviewed and updated in the SIS:
Student Information System - There are guidelines to only use a seat cap = 0 in the SIS to reserve or hold seats for a specific population for extenuating circumstances only:
Policy & Procedure - The student information system enforces the course scheduling guidelines:
Classroom Scheduling - There is a consistent and regular process to review academic space needs:
Sustainability - Metrics beyond academic program enrollment are used to monitor sustainability such as centrality to mission or community workforce development needs:
Faculty Scheduling - We have a systematic method for balancing student need with faculty availability and when courses are offered:
Student Information System - Program requirement substitutions and waivers are accurately documented and represented in the SIS:
Classroom Scheduling - Classroom utilization metrics are used to regularly review effective use of space:
Student Information System - The rules in the student information system are organized in a way that enforces program requirements, institutional policy, and supports student success (ie waitlisting, prereqs, restrictions etc.):
Classroom Scheduling - Classroom utilization metrics are consistently tracked and reported:
Policy & Procedure - The final exam schedule is published in advance of the first day of classes and in time to be included in syllabi:
-7
-7
-8
-8
-10
-12
-12
-13
-13
-14
-14
-20
-25
-20
-15
-10
-5
0
Answer Scores

Stakeholder Meetings Summary

Strengths (Focus Group v Survey v Web)

Evidence of strong commitment to improve current state of classroom and course scheduling. Willingness to use data.

Program Pathways

Overall Student Success

Opportunity Themes

- Student Information System
- Room Scheduling
- Policies & Procedures
- Schedule Grid

Student Information System

- Homegrown system with limitations
  - Ability to integrate with other software
  - Ability to automate internal processes, checks & balances (pre-requisites, student attributes etc.)
  - Increase understanding around functionality and set guidelines

Room Scheduling

- Use of spreadsheets for schedule planning – CES
- Inventory of RAC (spelling?) rooms vs. Non-RAC rooms - CES
    - Guidelines for shared spaces

Policies & Procedures

- Conceptual agreement around primary goal for course schedule
  - Is it to optimize for student success (ie conflict free schedule), accommodate faculty requests, or some combination of the two
  - Vetted and adopted through proper governance channels
- Clear outline of roles/responsibilities for course scheduling - CES
- Exception policies – CES
- Opportunity to review timeline for schedule planning, publication, registration - CES

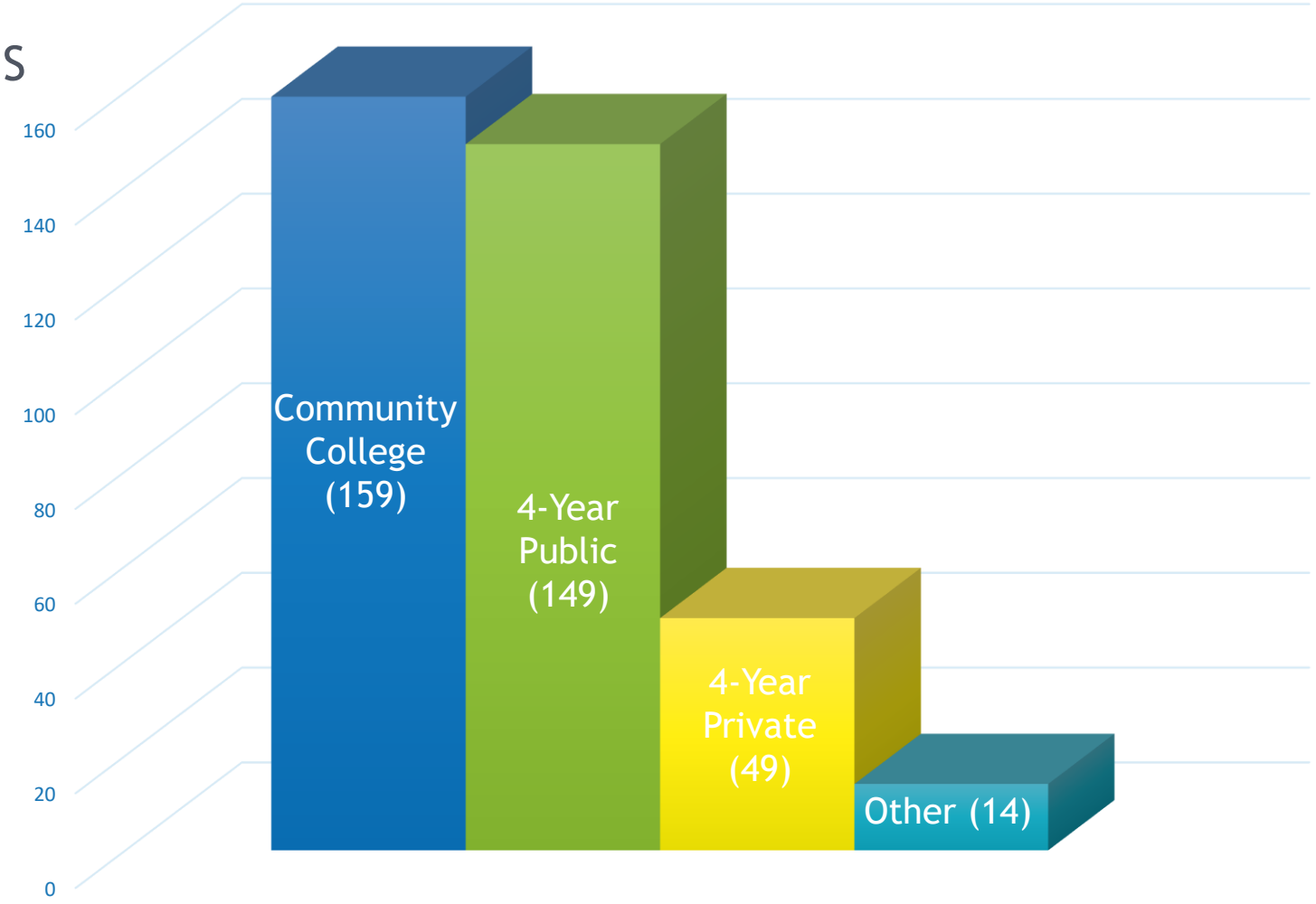
Schedule Grid

- No passing period – discussion of instructors needing to let students out early to get to next class
- Exam scheduling – CES
- Visibility into scheduling grid – CES
    - Exception policy

Strategic Scheduling Checkup Results

Higher Education Scheduling Index

- 371 INSTITUTIONS



The Data

- Section data for Fall 2017-2021
- Eliminated the following:
  - Eliminated Actual Enrollments of 0
  - Eliminated graduate courses
  - Eliminated Section Status C
  - Eliminated the Following Sections:
    - Tutorials, Clinical, Correspondence, Directed Reading, Dissertation, Field Experience, Field Trip, Individual Directed Study, Internship, Independent Study, Performance, Research Evaluation, Research Paper, Review Paper, Studio, Thesis, and Workshop
- Capacity analysis ran using Fall 2019, Fall 2021 data, and Classroom/Lecture Hall room types

Course Offering Analysis

Enrollment Ratio – Fall 2021

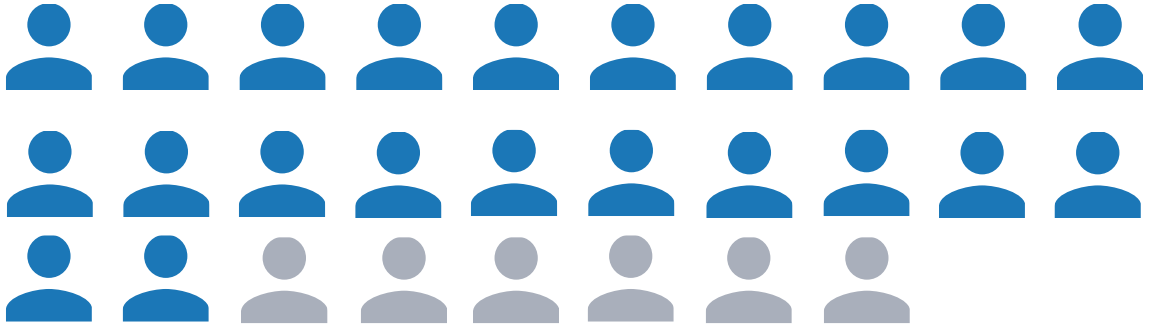
60

Average Course Enrollment

79%
filled

76

Average Course Capacity



Enrollment Ratio: Overall average fill rate for course offerings calculated as census enrollment divided by Enrollment Capacity.

Course Offering Summary – Fall 2021

Average Enrollment / Average Enrollment Capacity	
York U	Mean
60 / 76	21 /27

Course Offering Summary – Fall 2021

Measurement	Goal	Percent	Courses	All Institutions Percentile
Enrollment Ratio	85% Target	79%		**61st**
Overloaded Course Ratio *(>95% Enroll Ratio)*	<10%	15%	202 of 1,338 courses	**64th**
Balanced Course Ratio *(>70% <95% Enroll Ratio)*	>65%	50%	669 of 1,338 courses	**95th**
Underutilized Course Ratio *(<70% Enroll Ratio)*	<30%	35%	467 of 1,338 courses	**72nd**

Course Offerings by Level – Fall 2021

Course Level	Courses	Sections	Enrollment Ratio	Overloaded Course Ratio	Underutilized Course Ratio
1000 Level	160	316	81%	12%	26%
2000 Level	258	442	80%	13%	36%
3000 Level	500	667	78%	16%	38%
4000 Level	420	514	78%	17%	34%
Undergraduate Total	**1,338**	**1,939**	**79%**	**15%**	**35%**

Course Offerings by Section Count – Fall 2021

- 54% of the undergraduate schedule is offered as a single section per course (71% average)
- Single sections are balanced on average; more analysis is needed on requirement vs elective
- Higher offering courses tend to be the highest filled

Courses by number of Sections Offered	Fall 2021 Sections Offered	Fall 2021 Enrollment Ratio
1 Section	1,054	75%
2 Sections	308	81%
3-5 Sections	370	82%
6-10 Sections	182	86%
11+ Sections	25	88%

Course Offering Analysis – Fall 2022

Measurement	Percent	Sections	All Institution Percentile
Reduction Candidates	**2%**	50 sections	**90th**
Addition Candidates	**0.19%**	4 sections	**94th**

Addition Candidates: The percentage of total sections in a schedule that could potentially be added to the schedule based on sufficient student demand to justify one or more additional sections, limited to courses offered in the analyzed term.

Reduction Candidates: The percentage of total sections/courses in a schedule that could potentially be removed based on insufficient demand.

Course Offering Takeaways

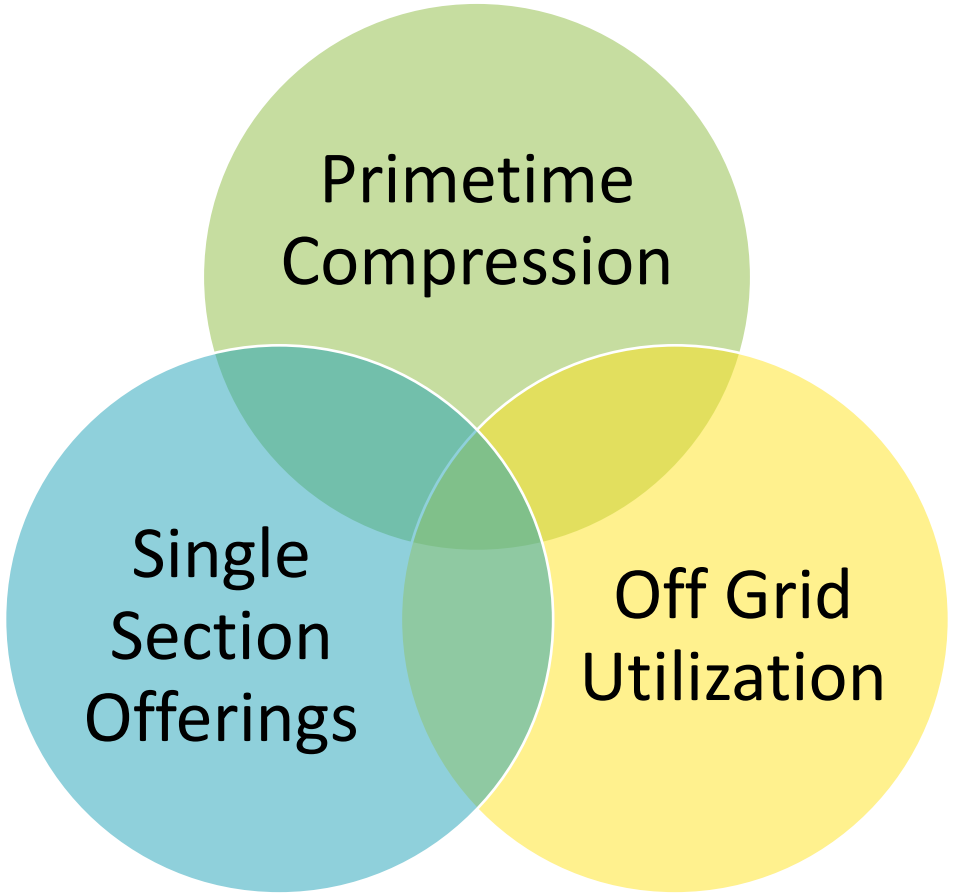
- Review reallocation candidates to shift appropriate resources to high offering sections
- Review addition and overloaded courses for term-to-term bottlenecks, specifically in potential general education bottlenecks
- Review single section offerings
  - Review for demand and timing
  - Utilize pathway analysis to further explore rotation options

Capacity Analysis

Keele Campus

Classroom and Lecture Hall Room Type

Managing Scheduling Complexity



Space Utilization Parameters

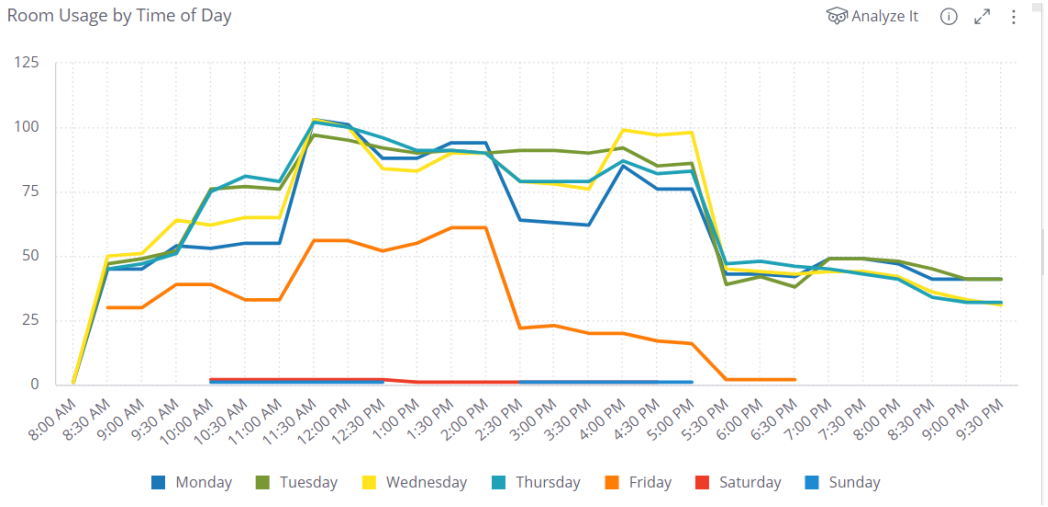
Standard Week (67.5 hrs)

Monday	8:30 AM – 10:00 PM
Tuesday	8:30 AM – 10:00 PM
Wednesday	8:30 AM – 10:00 PM
Thursday	8:30 AM – 10:00 PM
Friday	8:30 AM – 10:00 PM

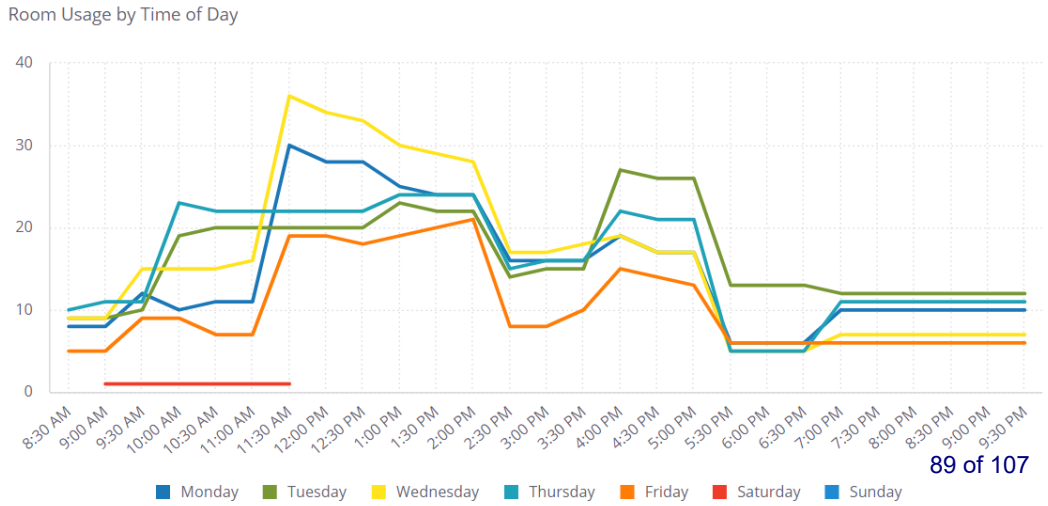
Primetime Week (30 hrs)

Monday	11:30 AM – 5:30 PM
Tuesday	11:30 AM – 5:30 PM
Wednesday	11:30 AM – 5:30 PM
Thursday	11:30 AM – 5:30 PM
Friday	11:30 AM – 5:30 PM

2019



2021



Space Utilization Summary

Measurement	2019 Percent	2019 Percentile	2021 Percent	2021 Percentile
Standard Utilization	51%	80th	27%	19th
Primetime Utilization	68%	65th	39%	8th
Primetime Compression	34%	83rd	43%	67th

Standard Utilization: The percentage of hours in a standard week (as defined by each institution's usage patterns) that a typical classroom is in use.
Primetime Utilization: The percentage of hours in the primetime subset of a standard week (as defined by each institution's usage patterns) that a typical classroom is in use.

Classroom Utilization by Size Category – Fall 2019

Seats	Rooms	Standard Week Utilization	Prime Week Utilization	Primetime Compression
1 - 15	2	16%	22%	39%
16 - 25	6	32%	48%	50%
26 - 50	73	46%	63%	38%
51 - 100	81	51%	69%	36%
100+	42	63%	79%	25%
Totals	**204**	**51%**	**68%**	**34%**

Classroom Utilization by Size Category – Fall 2021

Seats	Rooms	Standard Week Utilization	Prime Week Utilization	Primetime Compression
16 - 25	5	9%	19%	100%
26 - 50	58	24%	37%	55%
51 - 100	60	29%	41%	44%
100+	34	34%	43%	26%
Totals	**157**	**27%**	**39%**	**43%**

Classroom Utilization by Room Priority – Fall 2021

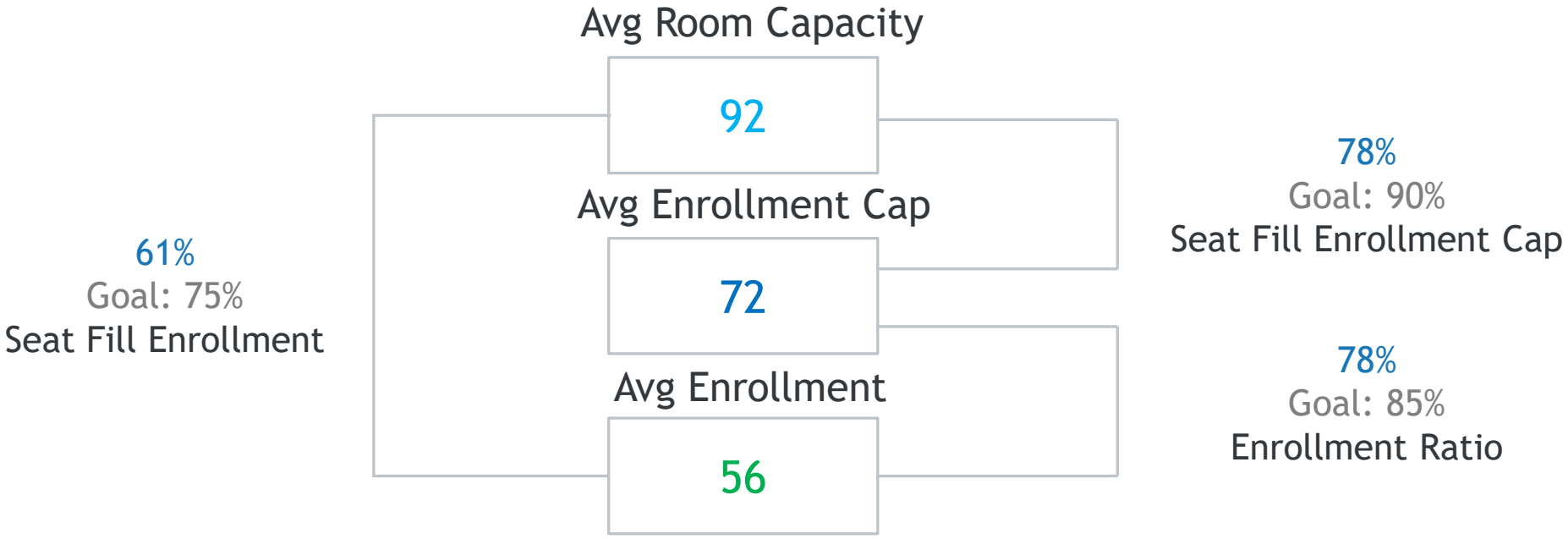
Seats	RAC Rooms	Non-RAC Rooms	RAC Prime Week Utilization	Non-RAC Prime Week Utilization
16 - 25	1	4	7%	22%
26 - 50	44	14	44%	12%
51 - 100	53	7	46%	9%
100+	34	0	43%	-
Totals	**132**	**25**	**44%**	**13%**

Enrollment Ratio Impact on Seat Fill Utilization

- Seat Fill Utilization – Enrollment: The percentage of seats in use (based on enrollment) in a classroom when it is scheduled (Average Enrollment divided by room capacity).

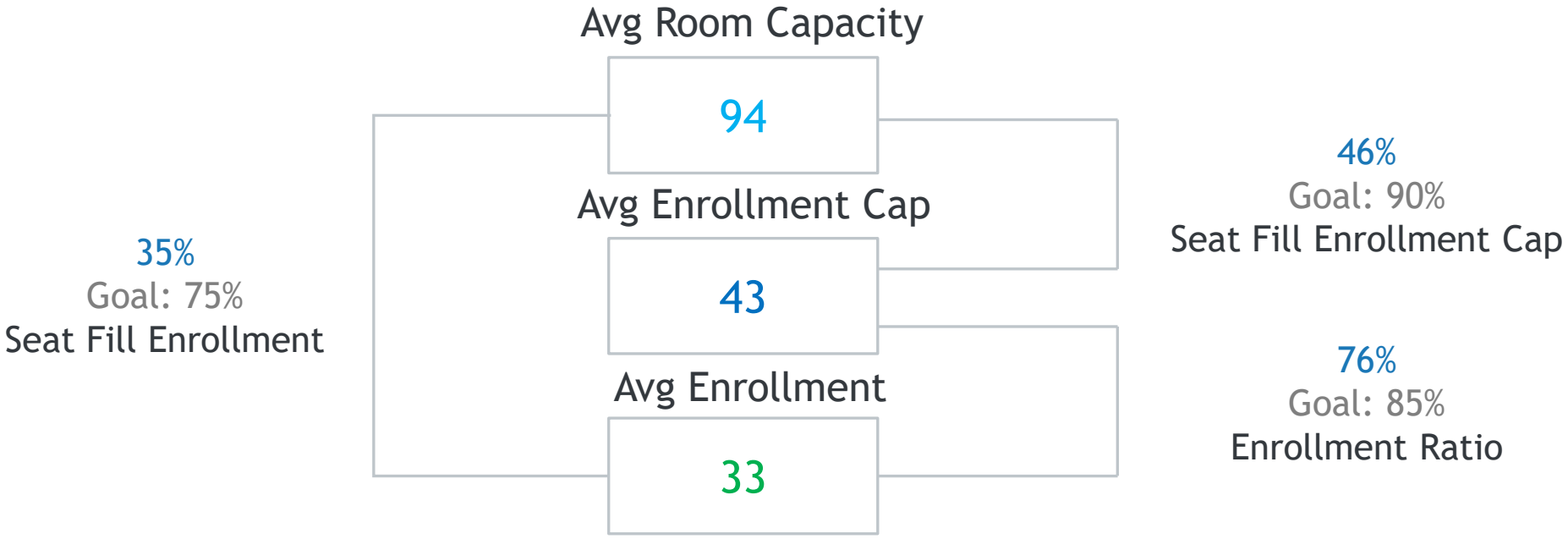
- Seat Fill Utilization – Enrollment Cap: The percentage of seats in use (based on section enrollment caps) in a classroom when it is scheduled (Average Enrollment Capacity divided by room capacity).

Enrollment Ratio Impact on Seat Fill Utilization – Fall 2019



Measurement	Fall 2019 Percentile
Seat Fill (Enrollment) Ratio	61st
Seat Fill (Capacity) Ratio	56th

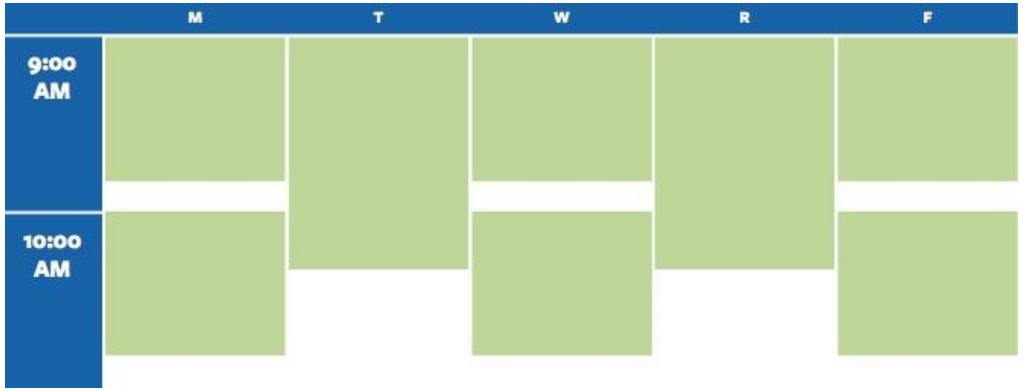
Enrollment Ratio Impact on Seat Fill Utilization – Fall 2021



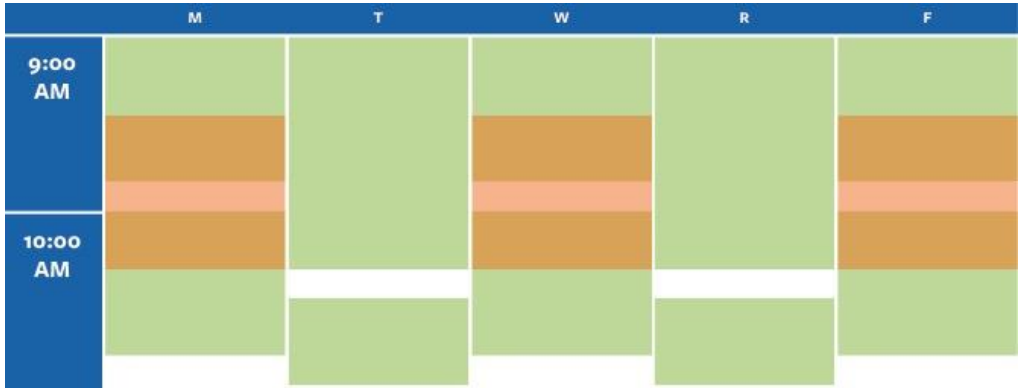
Measurement	Fall 2021 Percentile
Seat Fill (Enrollment) Ratio	6th
Seat Fill (Capacity) Ratio	2nd

The Importance of On-Grid Scheduling

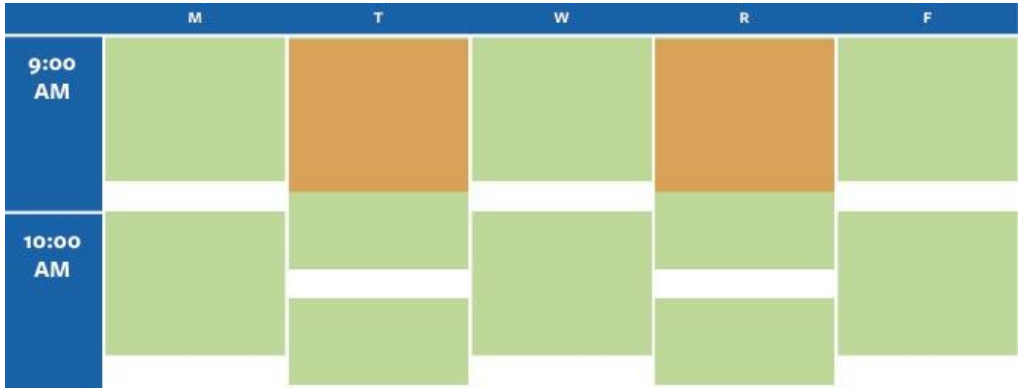
A Typical Primetime Meeting Pattern Grid



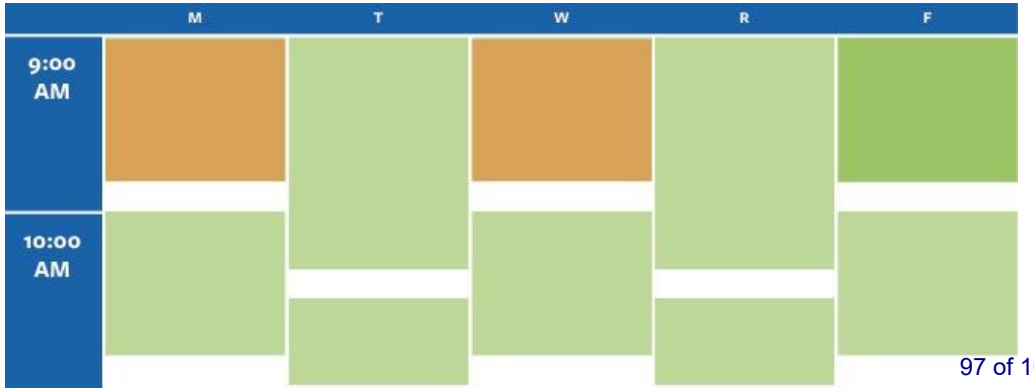
Problem Type 1: The Overlap



Problem Type 2: The Partial Block



Problem Type 3: The Partial Week



Meeting Pattern Analysis – Fall 2019

Meeting Pattern	On-Grid Utilization	Off-Grid Utilization	Off Grid Waste
M 11:30 AM - 02:30 PM	36%	38%	14%
M 02:30 PM - 05:30 PM	28%	39%	17%
T 11:30 AM - 02:30 PM	39%	39%	8%
T 02:30 PM - 05:30 PM	35%	35%	12%
W 11:30 AM - 02:30 PM	41%	37%	13%
W 02:30 PM - 05:30 PM	40%	35%	11%
R 11:30 AM - 02:30 PM	39%	40%	11%
R 02:30 PM - 05:30 PM	33%	38%	14%
F 11:30 AM - 02:30 PM	24%	33%	17%
F 02:30 PM - 05:30 PM	12%	11%	10%
Total	**33%**	**35%**	**13%**

Meeting Pattern Analysis – Fall 2021

Meeting Pattern	On-Grid Utilization	Off-Grid Utilization	Off Grid Waste
M 11:30 AM - 02:30 PM	17%	23%	21%
M 02:30 PM - 05:30 PM	13%	19%	19%
T 11:30 AM - 02:30 PM	17%	22%	19%
T 02:30 PM - 05:30 PM	16%	17%	21%
W 11:30 AM - 02:30 PM	20%	23%	21%
W 02:30 PM - 05:30 PM	16%	19%	18%
R 11:30 AM - 02:30 PM	20%	19%	18%
R 02:30 PM - 05:30 PM	13%	19%	23%
F 11:30 AM - 02:30 PM	18%	18%	20%
F 02:30 PM - 05:30 PM	3%	8%	7%
Total	**15%**	**19%**	**19%**

Meeting Pattern Analysis

Measurement	Percent (Fall 2019)	Percentile (Fall 2019)	Percent (Fall 2021)	Percentile (Fall 2021)
Off Grid Usage	35%	15th	19%	45th
Off Grid Waste	13%	44th	19%	14th

Off-Grid Utilization: The percentage of scheduling using non-standard meeting patterns during Primetime Hours.
Off-Grid Waste: The percentage of capacity wasted by scheduling non-standard meeting patterns during Primetime Hours.

Analysis Takeaways

- Low-to-Moderate Classroom utilization
- Opportunities to enhance the schedule to decrease conflicts will require collaboration in the following areas:
  - Gen ed spread on higher demand course offerings
  - Continued adherence to on-grid meeting patterns
  - Decreasing the amount of unique meeting patterns

Recommendations

Policy & Process Recommendations

- Create an academic scheduling policy
- Include priority room scheduling parameters and guiding principles in an academic scheduling policy
- Establish and adhere to standard meeting patterns
- Consider additional course demand analyses
- Utilize data to support student-centric course scheduling through pathways

Existing Software & Service Recommendations

Conduct a business process review and audit use of room scheduling software.

Continue implementing current plan for SIS and optimize to support course scheduling business processes

Ad Astra Software & Service Recommendations

Implement Monitor for registration monitoring and tracking

Partner with Ad Astra to do a deep dive meeting pattern analysis service

Partner with Ad Astra to do a pathways analysis

Next Steps

Provide	PDF presentation, recording, and report
Coordinate	Meeting to review recommendations (Effective Practices Workshop) and build action plan with steering committee
Design	Action Plan

Schulich School of Business Memorandum

To:	Faculty Council, Schulich School of Business
From:	Moren Lévesque
Date:	11 February 2024
Re:	Retirement of ENTR 6655 3.00 Social Entrepreneurship

Motion:
That Faculty Council approves the retirement of ENTR 6655 3.00 Social Entrepreneurship.

Rationale:
As course enrollment for ENTR 6655 was declining 2-3 years ago (dipping below the 15-student target), we elected to grant MBA students access to a joint course offering that granted them access to the matching (and successful BBA course). While the BBA enrollment numbers remained (and continue to remain) strong and the combined course has excellent teaching evaluations, the MBA student enrollment has continued to decline, and the instructor has received ongoing comments from the MBA students that the course is taught at a BBA level. This works great for the BBA students, but the MBA students would clearly like a course offering that is different. Unfortunately, the MBA enrollment number do not allow for us to offer an exclusive MBA course.

Schulich
School of Business
York University

Course Change Proposal Form

Schulich School of Business

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

1. Responsible Program:
   Schulich MBA

2. Responsible Unit:
   ENTR

3. Subject Code (Rubric) and Course Number:
   ENTR 6655

4. Credit Value:
   3.00

5. Long Course Title:
   Social Entrepreneurship

6. Short Course Title:
   Social Entrepreneurship

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):

Schulich School of Business
York University

Winter 2025

9. Rationale:

As course enrollment for ENTR 6655 was declining 2-3 years ago (dipping below the 15-student target), we elected to grant MBA students access to a joint course offering that granted them access to the matching (and successful BBA course). While the BBA enrollment numbers remained (and continue to remain) strong and the combined course has excellent teaching evaluations, the MBA student enrollment has continued to decline, and the instructor has received ongoing comments from the MBA students that the course is taught at a BBA level. This works great for the BBA students, but the MBA students would clearly like a course offering that is different. Unfortunately, the MBA enrollment number do not allow for us to offer an exclusive MBA course.

10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title ~~Current text~~	Title Current and new text

Not applicable

11. Enrolment Notes:

Enrollment has continued to decline, which is why we proposed to retire this course.

12. Consultation:

Chris and I (as co-director of Entrepreneurial Studies) consulted with both Mike Valente as MBA Program Director and Kevin Tasa as Associate Director Academic. We did so as we were updating the ENTR specialization for both the iBBA/BBA and the MBA programs. They agreed with our decision to retire ENTR 6655 3.00 Social Entrepreneurship owing to the lack of interest among our MBA students, which has been evidenced by low enrollments over the past years.

Originator:

Signature

11 February 2023
Date

Moren Lévesque
Name

ENTR and OMIS
Area or Specialization

Schulich
School of Business
York University

Approvals:

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

	11 February 2024
Signature	Date
Moren Lévesque	ENTR and OMIS
Name	Area or Specialization

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

Mike Valente	March 21, 2024
Signature	Date
Mike Valente	MBA
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date
Kevin Tasa	MPC
Name of Committee Chair	Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Henry Kim, Associate Professor of OMIS and Area Coordinator
Date: March 16, 2024
Re: New Course Proposal: OMIS 6620: Design Thinking

Motion:

That Faculty Council approves the creation of a new course entitled OMIS 6620: Design Thinking

Rationale:

This course will be a core course for the OMIS elective in Digital Transformation. The rationale for the importance of the course for the elective is as follows. The course is essential for preparing students to lead in the digital age. This course fosters innovative problem-solving skills by emphasizing a human-centric approach, crucial for creating meaningful digital solutions. It encourages interdisciplinary collaboration, reflecting the diverse team dynamics in modern workplaces. Enhancing digital literacy, the course prepares students to integrate technology creatively throughout the design process. By aligning with industry trends and employer demands, it equips students with highly sought-after skills, positioning them for success in a rapidly evolving digital landscape. This strategic addition will not only enhance the curriculum but also strengthen the school's competitive advantage, attracting students and employers alike.

Schulich
School of Business
York University

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 Program

2. Responsible Unit:
   OMIS

3. Subject Code (Rubric) and Course Number:
   OMIS 6620

4. Credit Value:
   3.00

5. Long Course Title: Design Thinking

6. Short Course Title: Design Thinking

7. Effective Term/Calendar Year:
   Fall 2024

8. Language of Instruction: English

9. Calendar (Short) Course Description:

This course trains managers who participate in solving difficult business problems (e.g. IT transformations) how to modify their perspective on problem solving to innovate in organizations. Using design thinking, managers learn how to engage with their peers and users using a hands-on, step-by-step process. They learn how to contextualize problems, brainstorm, prototype and test technical solutions that achieve real-world validation.

Please include information with respect to any pre-/co-requisites and/or cross-listing or integration in the course description.

Schulich
School of Business
York University

10. Expanded Course Description:

This course will train managers who participate in solving difficult business problems (e.g. IT transformations, restructuring, new product innovation, etc.) how to modify their perspective on problem solving to innovate in their organizations. Using design thinking, a leading process adopted from the design world, managers learn how to engage with their peers and users (internal and/external) using a hands-on, step-by-step process. They learn how to accurately contextualize problems, brainstorm, prototype and test technical solutions that achieve real-world validation.

Method of Instruction

This course is designed around a variety of pedagogical tools—interactive lectures, an in-class hands-on project led by the instructor to demonstrate design thinking from beginning to end, facilitated discussions, guest speakers, individual assignments, and a group "outcomes" project. Focused on learning by experiencing, the interactive lectures and facilitated discussions will assist in clarifying concepts and ideas, while the hands-on, in-class activities will enforce the experimental nature of Design Thinking.

Student Preparation

Expect to spend at least 5-6 hours per week preparing for this class and completing assignments. Learning in this course involves reading assigned materials (book's chapters, articles) to prepare for the concepts learned in the following class, and actively working on a project throughout the semester, each week with activities related to the learned lesson. Project assignments are due in groups, while there will be 2 individual assignments as well.

It is important that you read the required material posted on Canvas prior to attending class. Class slides will be posted on Canvas at the beginning of each class for your reference.

Group Work

This course features one group project, with deliverables throughout the semester, and a final presentation. The deliverables throughout the semester are the assets that need to be created while developing the project, therefore it is important to produce them on a regular basis rather than wait for the end of the semester. This will also give your instructor an opportunity to provide ongoing feedback.

The final presentation is to summarize the "outcome" of the project. This is a summary of the process from start-to-end for the specific project that the students worked on throughout the course. In addition, students will be asked to apply their learnings, what the outcome of their project is, and what might be the next iteration.

The actual presentation is an 8 –10 minute presentation to an audience of classmates and instructor, that will occur in the last lecture in the course. A detailed report also accompanies the presentation.

Group sizes will depend on the number of students enrolled.

11. Course Learning Outcomes:

At the conclusion of this course, the students will learn:

- What is meant by design thinking, why it is important and how it compares with other management innovation frameworks
- Where and how to apply design thinking, with tools and a process to apply for design thinking
- What it means to be user centric and how to build empathy towards users
- How to define the context of the problem that is being solved
- How to ideate, come up, prioritize and validate new ideas
- How to prototype and test ideas by iterating on the process to learn and innovate incrementally
- How to effectively present results and outcomes associated with design thinking

12. Rationale:

This course will be a core course for the OMIS elective in Digital Transformation. The rationale for the importance of the course for the elective is as follows. The course is essential for preparing students to lead in the digital age. This course fosters innovative problem-solving skills by emphasizing a human-centric approach, crucial for creating meaningful digital solutions. It encourages interdisciplinary collaboration, reflecting the diverse team dynamics in modern workplaces. Enhancing digital literacy, the course prepares students to integrate technology creatively throughout the design process. By aligning with industry trends and employer demands, it equips students with highly sought-after skills, positioning them for success in a rapidly evolving digital landscape. This strategic addition will not only enhance the curriculum but also strengthen the school's competitive advantage, attracting students and employers alike.

13. Evaluation:

The following components will be evaluated to contribute to the final course grade.

1. Class participation – public contribution to classroom discussions and hands-on activities
2. 2 individual assignments that address focused activity related to lecture learnings
3. 4 milestone group submission of assets, to encourage the groups to work on their project throughout the course

4. Midterm, focused on understanding the "why" behind the process and activities of design thinking
5. Group project outcome presentation – class presentation and paper of the groups' project conclusion (process, learning, outcomes, challenges and solutions, next steps)

Deliverable	Weight	Format
Class Participation	10%	Individual
2 small assignments	20%	Individual
Selection of a project and 4 project milestone to submit artifacts	10%	Group
Mid-term	25%	Individual
Project "Outcome" final:		
a. Class Presentation (~10 slides)	15%	Group
b. Written report (~ 4000 words)	15%	Group
c. Peer reviews	5%	Individual
	100%	

14. Integrated Courses:
N/A

15. Cross-listed Courses:
N/A

16. Enrolment Notes:
This course will be offered to the students enrolled in MBA Program

17. Faculty Resources:
This course will be offered once in the fall and once in the winter. As a core course in the Digital Transformation specialization, we expect there to be demand for two sections. Impact on faculty resources should be low.

18. Physical Resources:

This course will likely be delivered in person. For best outcome and to follow industry standards, this course will be learned hands-on, in an immersive class setting. The best classes for that will have Whiteboard (rather than blackboards), and a small number of physical resources will be needed, mostly multi coloured post-it sticky notes and dry-erase markers.

19. Bibliography and Library Statement:
Please provide an appropriate and up-to-date bibliography in standard format. A statement

from the University librarian responsible for the subject area certifying that adequate library resources are available for the new course must be provided.

Suggested book:

Designing for Growth: A Design Thinking Tool Kit for Managers, Jeanne Liedtka and Tim Ogilvie, Columbia Business School Publishing; Illustrated edition (June 28 2011)

https://www.amazon.ca/Designing-Growth-Design-Thinking-Managers/dp/0231158386/

Optional:
The Designing for Growth Field Book: A Step-By-Step Project Guide Jeanne Liedtka and Tim Ogilvie, Columbia Business School Publishing; Illustrated edition (April 30 2019)

https://www.amazon.ca/Designing-Growth-Field-Step-Step/dp/0231187890

Additional references:

These are sample articles. Some might change as the course is being taught.

GE Healthcare: Changing Experiences through Empathy – The Adventure Series
OralB: How Two Industrial Design Titans Are Helping Brands Simplify Tech
Netflix: How Netflix Used Design Thinking to Reinvent Itself, Over and Over
Airbnb: Airbnb, a Design Thinking success story
UberEats: How We Design on the UberEATS Team
IBM: How IBM is Training Its Workforce to Think Like Designers

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

20. Instructors and Faculty Coordinator

Initial instructor:
Moshe Mikanovsky

Alternative instructors:
Henry Kim
Divinus Oppong-Tawiah
Kayla Li

Course coordinator:
Henry Kim

21. Specializations

Primary area or specialization:
Digital Transformation

Secondary areas or specializations:
Supply Chain Management

22. Student Contact and Enrolment

Contact hours:

12 sessions, 3hrs each

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

Expected enrolment:
We expect a steady state of 35-45 students per section for two sections.

Evidence for enrolment expectations:

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Currently there are two sections of the Digital Transformation in Services course, which is another core course in the Digital Transformation specialization taught in the winter. So, we expect a similar demand for this proposed course.

23. Human Participants Research

1. In class work will involve Human Participants Research within the students group.
2. For students' projects, some interaction with Human Participants Research will be needed. This will depend on the project the students decide to work on, and can be either:
    a. With other students in the class, or
    b. With external individuals that the students will contact directly, as related to their projects. These individuals are the target users/clients of their project's subject.
3. Note that we have explicitly included this in the syllabus: Please note that we must adhere to York University's policy on human participation ethics review as outlined here[1]. The instructor and the course director will provide instructions on how this will occur in the course.

24. Conditions for Approval

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

The area is in the process of changing the Digital Transformation specialization, which is a specialization that has garnered substantial interest by prospective and current students. The area feels that this proposed course (Design Thinking) is a fundamental requirement for this specialization. Because the existing required course for the specialization (OMIS 6610) has high enrollment (one section of 42 and one section of 28 in 2022), we expect a similar level of interest in this proposed course. Perhaps most important is that, in the broader restructuring of the OMIS area's specializations/streams, the area will be putting forth motions in the May 2024 MPC to retire at least 1, if not 2, elective courses. Considering all this, we feel that this new course is justified.

Originator:

Henry Kim	March 20, 2024
Signature	Date
Henry Kim	OMIS

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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.

Moren Levesque
Markus Giesler
David Rice
Ruodan Shao
Willow A Sheremata
Pauline M P Shum Nolan
Divinus Oppong-Tawiah
Guangrui Li
David Alan Johnston
Mehmet Murat Kristal
Markus Biehl
Julian Scott Yeomans
Adam Diamant
Isik Bicer

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.

Henry Kim	March 20, 2024
Signature	Date
Henry Kim	OMIS
Name of Coordinator or Director	Area or Specialization

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

Mike Valente	March 20, 2024
Signature	Date

Mike Valente	MBA
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date

Kevin Tasa	MPC
Name of Committee Chair	Committee

OMIS 6620 3.0: Design Thinking

Course Outline
Fall 2024

Date: TBA
Classroom: TBA
Format: In-Class Teaching

Instructor	Assistant
Moshe Mikanovsky E-Mail: moshem@schulich.yorku.ca Office hours: TBA	

Moshe Mikanovsky is a veteran software engineer and product management leader. During his career he developed and managed many B2B/B2B2C software products in multiple industries - Product Lifecycle Management for Manufacturing Engineering, Work Management for Project Management systems, Debit Cards solutions for a FinTech startup, tools for Loyalty Programs solutions, Virtual Data Rooms for Mergers & Acquisitions, AI/NLP based Legal search, back-office and contractors/clients portals for staffing agencies, Climate Change based models for financial risk and more. The first 20 years he spent in engineering, and then the past 13 years in Product Management. Moshe currently advises startup and growth companies, as well as founders, entrepreneurs and product people, on how to build the right products. He co-hosts the Product for Product Podcast, and hosts the Beyond Product podcast (by Rootuotient). He is the founder and lead mentor of Products for Good, where aspiring product managers gain real world experience in building products for good social causes. He holds a Master of Science in Information Systems from Lawrence Technological University in Southfield, Michigan. In his free time, Moshe loves reading and writing. His first fictional book "The Resurrector" was published in January 2022.

Brief Description

Short / Calendar (Short) Course Description:

This course will train students participating in solving hard business problems (such as IT transformations, restructuring, new product innovation etc) how to shift their approach to problem-solving, applying modern methods to tackle ambiguous and complex challenges, and foster innovation. Utilizing Design Thinking, a prominent methodology derived from the design industry, students aiming to spearhead innovation within their environments will learn, through a hands-on, step-by-step process, how to engage with their peers and users (internal and/or external), accurately contextualize the problem, swiftly brainstorm to uncover new ideas, prototype, and test technical solutions until they achieve real-world validation for the most effective direction to pursue.

Long / Expanded Course Description:

Traditional linear thinking for innovation is broken. We know that we don't know everything, and with the increasing complexity of business problems we are trying to solve, and the ecosystem they are part of, managers need new ways to validate their innovation. This is where Design Thinking comes in, adapted in the past decade from the domain of visual and product designers, to the extended teams and their leaders, to reduce the risk of failure. Design Thinking is a mindset that requires a shift in thinking and emphasis on the users. But it is also a process that can be learned and applied to other disciplines.

This course will train managers who participate in solving hard business problems (such as IT transformations, restructuring, new product innovation etc) how to modify their perspective on problem solving, and apply contemporary methods to solve ambiguous and complex problems, and innovate. Using Design Thinking, a leading process adopted from the design world, managers who aspire to lead innovation in their organizations will learn, through a hands on, step-by-step process, how to engage with their peers and users (internal and/or external), accurately contextualize the problem, swiftly brainstorm the uncover new ideas, prototype and test technical solutions until they achieve real-world validation for the most effective direction to pursue.

Throughout the course, the instructor and students will work together in the class on a selected problem. We will apply Design Thinking methods and shift our perspectives to find true innovation. This will provide the students a hands-on learning experience from the instructor's lead. To strengthen their learning, students will be working in groups on their own project throughout the course. Groups will submit artifacts for specific milestones to show their progress, while in a final group presentation, the groups will present the project end-to-end, focusing on the learnings the students acquired during the course.

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Course Learning Outcomes

At the conclusion of this course, the students will learn:

- What is meant by design thinking, why it is important and how it compares with other management innovation frameworks
- Where and how to apply design thinking, with tools and a process to apply for design thinking
- What it means to be user centric and how to build empathy towards users
- How to define the context of the problem that is being solved
- How to ideate, come up, prioritize and validate new ideas
- How to prototype and test ideas by iterating on the process to learn and innovate incrementally
- How to effectively present results and outcomes associated with design thinking

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.

Deliverable	Weight	Format
Class Participation	10%	Individual
2 small assignments	20%	Individual
Selection of a project and 4 project milestone to submit artifacts	10%	Group
Mid-term	25%	Individual
Project "Outcome" final:		
a. Class Presentation (~10 slides)	15%	Group
b. Written report (~ 4000 words)	15%	Group
c. Peer reviews	5%	Individual
	100%	

Course Material

The course consists of a mix of lectures, discussions, in-class 'thinking' and visualization exercises. Active participation is essential if students are to get the most out of this course. Links to all materials are available on Canvas and through York University's OMNI Library system.

Suggested Resources

Books:

Designing for Growth: A Design Thinking Tool Kit for Managers, Jeanne Liedtka and Tim Ogilvie, Columbia Business School Publishing; Illustrated edition (June 28 2011)
ISBN#: **978-0231158381**

Optional:
The Designing for Growth Field Book: A Step-By-Step Project Guide Jeanne Liedtka and Tim Ogilvie, Columbia Business School Publishing; Illustrated edition (April 30 2019)

https://www.amazon.ca/Designing-Growth-Field-Step-Step/dp/0231187890

Additional reading:

These are sample articles. Some might change as the course is being taught.

GE Healthcare: Changing Experiences through Empathy – The Adventure Series
OralB: How Two Industrial Design Titans Are Helping Brands Simplify Tech
Netflix: How Netflix Used Design Thinking to Reinvent Itself, Over and Over
Airbnb: Airbnb, a Design Thinking success story
UberEats: How We Design on the UberEATS Team
IBM: How IBM is Training Its Workforce to Think Like Designers

Student Preparation for Class and Class Participation: Expectations

Expect to spend at least 5-6 hours per week preparing for this class and completing assignments.

Preparation: It is expected that students are prepared for class by reading assigned materials (book's chapters, articles) to prepare for the concepts learned in the following class. It is important that you read the required material posted on Canvas prior to attending class. Class slides will be posted on Canvas at the beginning of each class for your reference.

Assignments: The group project is expected to be worked on throughout the semester, each week on activities related to the learned lesson. Project artifacts are due in groups in the specific milestones, to encourage proper cadence of project's execution

Two Individual assignments are due during weeks that group assets are not due, but it is encouraged that teams meet regularly, and align their project's process to the lessons learned in class.

Classroom Participation & Attendance: Your Class Participation Grade will be based on your attendance and contributions to in-class activities.

Late Assignments: Late assignments are not accepted. Additional assignments or extra work in lieu of a missed assignment is not allowed. Students must submit their assignments on Canvas at the prescribed date/time indicated on Canvas.

Class-by-Class Syllabus

Topics, readings and other preparations for every class are listed below. Readings, or online links to readings, are available on Canvas.

Wk	Subject	Class Outcome	Assignment	Ref
1	Introduction to Design Thinking: What is Design Thinking? And why is it used in business? Project selection	Understand what Design Thinking is, how it differs from other frameworks, where it can be used and why it is used	In teams, choose an innovation problem of their own choosing (see criteria for project selection in Note 1 below). Value 2% students must submit and get approval for project before Week 2	Chapters 1-2
2	Project Brief Visualization methods	Define the project brief and learn different methods of visualization that will support all following activities in the class	Individual assignment: Visualization exercise Value 10% Due Week 3	Section II intro, Chapter 3
3	What is? Journey Mapping (Empathize)	Learn how to map the user's journey, and how to build an empathy to the users		Chapter 4

4	What is? Define: Value Chain Analysis, and Mind Mapping	Define the problems that are worth solving by understanding the context: looking at the value chain and mind mapping the entire domain of the problem	Group project milestone artifacts - What is? - Project Brief - An interview plan - Interview script of 3 target users - List of findings from interviews - Value chain analysis - Mind map Value 2% Due Week 5	Chapters 5-6
5	Design Criteria What if? Ideate: Brainstorming	Identify design criteria to help with choosing alternatives, and generate ideas.		Section III intro, Chapter 7
6	What if? Ideate: Concept development	Continue ideating by building concepts	Group project milestone artifacts - What if? - Design criteria document - A list of 5 ideas - Concepts for top 3 ideas Value 2% Due Week 7	Chapter 8
7	Napkin Pitch What wows? Assumption Testing Mid Term	Build quick pitches for each alternative to be able to compare them, and prioritize which idea has the best chance	Mid Term: Focus is on understanding the why behind the process. Value: 25%	Section IV intro, Chapter 9
8	What wows? Rapid Prototyping	Learn different methods of prototyping, to test ideas in the least expensive ways	Group project milestone artifacts - What wows? - Napkin pitch for top 3 ideas - Prioritization to order the 3 ideas - Prototype of 1 top idea	Chapter 10

			Value 2% Due Week 9	
9	Learning Guide What works? Customer Co-Creation	Define the constraints of the learning phase (resources, budget, investment, risk), and craft the selected solution with a customer. Note: Students might not have the customer on-hand in the class to do it.		Section V intro, Chapter 11
9	What works? Learning Launch	Learn about different methods to launch our solution, and ways to collect feedback, so we can learn from it	Group project milestone artifacts -What works? - Learning guide document - 2nd iteration of a prototype, built with potential customer (confirm customer participation) - Launched project - Method to Collect feedback - Qualitative Feedback from 5 clients - Qualitative feedback Value 2% Due Week 10	Chapter 12
10	Applying Design Thinking in different industries	Understanding how the process can be applied in different industries and scenarios, such as in development of products, services, business strategy, education, etc	Individual assignment: Case study on application of Design Thinking in other business problems Value 10% Due Week 11	Articles on different cases
11	Iterating: and the cycle starts again	Innovation development is not a one time thing, but a repeating cycle. After learning from the launched solution, start the process		

		all over again		
12	Final project presentations	Students present the project they worked on, identifying challenges, key learning and outcomes	Group: Class Presentation 15% Written report 15% Individual: Peer reviews 5%	

Notes:

1. Groups' project selection criteria guidelines - the projects suggested by the groups have to follow these criteria:
    a. No one student in the team has an "expert" knowledge of the problem. All team members should approach it from a novice level, as they need to be empathetic to learn the domain and not be led by one strong person on the team.
    b. The team needs to have personal connection to the project so they can find enough users to learn from and interview. This can be at university, work or personal. For example: a digital product they use at school, a problem at work, an idea for a product based on a personal experience, a challenge their family has in a family business, etc. Personal connection does not mean it's their personal problem, but rather they have access to the related domain and the users of that domain.
    c. Access is available to 5-10 people with the same problem
    d. Problem scope is not too large (eg. building an entire new accounting system) or too small (e.g choosing a new computer for the office)

Written Assignments/Projects: Descriptions

Individual assignments:

Individual Assignment 1: Visualization exercise

- Due: Class of Week 3
- Value: 10%

In this assignment, students will practice their visualization skills, to get them more comfortable with it, and prepare them to use it in future tasks throughout the course. The assignment will require zero artistic skills, and full creativity to draw something based on provided prompts. Students will not require any special tools for that - images taken by camera of pieces of papers that they drew on will be encouraged.

Individual Assignment 2: Case study on application of Design Thinking in other business problems

- Due: Class of Week 11
- Value: 10%

Students will have to research public case studies where Design Thinking was applied to a business problem, in a different industry or domain then what was learned in class. For that case, they will have to write a short paper answering:

- Why was Design Thinking selected for that case?
- What were the challenges in applying Design Thinking for the case?
- What were the learnings from that process?
- What are the key learnings for them to take away from the case?

Midterm

- Class of Week 7
- Value: 25%

The focus of the midterm is on understanding the why behind the process. Students will be asked about the learnings we covered so far, with emphasis on showing understanding of why Design Thinking is used, why the order is built in that way, why each of the components is there etc.

Group assignments:

This course features one group project, with deliverables throughout the semester, and a final presentation and paper. The deliverables throughout the semester are the assets that need to be created while developing the project, therefore it is important to produce them on a regular basis rather than wait for the end of the semester. This will also give your instructor an opportunity to provide ongoing feedback.

The final presentation is to summarize the "outcome" of the project. This is a summary of the process from start-to-end for the specific project that the students worked on throughout the course. In addition, students will be asked to apply their learnings, what the outcome of their project is, and what might be the next iteration.

The actual presentation is an 8 –10 minute presentation to an audience of classmates and instructor, that will occur in the last lecture in the course. A detailed report also accompanies the presentation.

Group sizes will depend on the number of students enrolled.

Please note that we must adhere to York University's policy on human participation ethics review as outlined here[1]. The instructor and the course director will provide instructions on how this will occur in the course.

Group Assignment 1: Project Proposal

- Due: Class of Week 2
- Value: 2%
- Max length: one page

In this assignment, teams will submit their proposal for a project, for the instructor's approval. Criteria:

1. Problem definition - what is the problem, who has this problem (client/users)
2. No one student in the team has an "expert" knowledge of the problem. All team members should approach it from a novice level, as they need to be empathetic to learn the domain and not be led by one strong person on the team.
3. The team needs to have personal connection to the project so they can find enough users to learn from and interview. This can be at university, work or personal. For example: a digital product they use at school, a problem at work, an idea for a product based on a personal experience, a challenge their family has in a family business, etc. Personal connection does not mean it's their personal problem, but rather they have access to the related domain and the users of that domain.
4. Access is available to 5-10 people with the same problem
5. Problem scope is not too large (eg. building an entire new accounting system) or too small (e.g choosing a new computer for the office)

Group Assignment 2: Group project milestone 1 (What is?) artifacts

- Due: Class of Week 5
- Value: 2%

In this assignment, groups will submit their project brief, including all steps of "What is?". This includes:

- Project Brief
- An interview plan
- Interview script of 5 target users
- List of findings from interview
- Value chain analysis
- Mind map

Group Assignment 3: Group project milestone 2 (What if?) artifacts

- Due: Class of Week 7
- Value: 2%

[1] under Course Related Research (Including Individual Projects & MRPs) Undergraduate theses, Independent projects and Graduate MRPs - What Forms Do I Use and Where Do I Submit Them?

In this assignment, groups will submit all artifacts for "What if?". This includes:

- Design criteria document
- A list of 5 ideas
- Concepts for 3 ideas

Group Assignment 4: Group project milestone 3 (What wows?) artifacts

- Due: Class of Week 9
- Value: 2%

In this assignment, groups will submit all artifacts for "What wows?". This includes:

- Napkin pitch for 3 idea
- Prioritization to order the ideas
- Prototype of 1 top idea

Group Assignment 5: Group project milestone 4 (What works?) artifacts

- Due: Class of Week 11
- Value: 2%

In this assignment, groups will submit all artifacts for "What works?". This includes:

- Learning guide document
- 2nd iteration of a prototype, built with potential customer (confirm customer participation)
- Launched project
- Method to Collect feedback
- Qualitative Feedback from 5 users
- Qualitative feedback

Group Final Project: Project Outcomes Report and Presentation

- Due: Class of Week 12
- Max length: Written paper 4000 words. Presentation 10 slide
- Value: 35% Point Allocation: *Written Paper: 15%, Presentation: 15%, Peer Review: 5%*

Student teams will present the project they worked on throughout the course. In the presentation, teams will have to:

- Summarize the Design Thinking process and how they apply it to their project
- Identifying challenges and solutions
- Key learnings from the process
- Outcomes of the process

Evaluation of Written Assignments/Projects and Exams

All papers, the final presentation and the participation grade will receive a letter grade. Your final grade in the course will be calculated by multiplying the number value of the letter grade with the weight of the assignment. Number values will correspond to standard Schulich grading system (i.e. A+ = 9, A = 8, A- = 7, B+ = 6 etc.). Different assignments have different grading criteria. As we discuss and review each assignment, additional information will be provided on the specific criteria for each assignment.

Turnitin: All submissions need to be submitted to Turnitin on Canvas. This must be done at the prescribed due date/time as indicated on Canvas.

General Academic Policies: Grading, Academic Honesty, 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 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 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.

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 https://accessibility.students.yorku.ca/.

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Joseph Mapa, Adjunct Professor; Executive Director Health Industry Management Program
Date: February 20th, 2024
Re: Changes to the Health Industry Management Program Specialization and to the Graduate Diploma in Health Industry Management

Motion:

That Faculty Council approve the changes in required course credits, the required courses, and the elective courses needed to fulfill the Health Industry Management Program Specialization and Graduate Diploma in Health Industry Management at the Schulich School of Business.

Rationale:

Currently, the HIMP Specialization and the Graduate Diploma in Health Industry Management requires that students take 3 courses from a list of 4 HIMP-specific courses and then an additional course from a list of non-health sector specific electives. For the graduate diploma, students must complete an additional 10-week internship in the health care sector. A review of the specialization and graduate diploma revealed two things: 1) that only 2 courses should be required content and that 2) the remaining 2 courses should be taken from a list of health-sector courses. Doing this will provide students with more flexibility in how to complete the specialization and graduate diploma while deepening their specialization in the sector. On top of the changes to the course requirements, the specialization is not a program and should not be labeled as such. The acronym will then change from HIMP to HIMS. Finally, there is a need to simplify the language of the specialization and the graduate diploma as they are currently confusing to students. Note that there are no changes being proposed to the existing courses.

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: Graduate Diploma in Health Industry Management

2. Effective Term/Calendar Year of Proposed Change(s): Fall 2024

3. Proposed Change(s) and Rationale:
The description of and rationale for the proposed modification(s) should provide information with respect to each of the following points:

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

Currently, the Graduate Diploma in Health Industry Management requires that students take 3 courses from a list of 4 HIMP-specific courses, an additional course from a list of non-health sector specific electives, and a 10-week internship in the health care sector. A review of the diploma revealed two things: 1) that only 2 courses should be required content for HIMP students and that 2) the remaining 2 courses should be taken from a list of health-sector courses. Doing this will provide students with more flexibility in how to complete the diploma while deepening their expertise in the sector. Finally, there is a need to simplify the language of the diploma as it is currently confusing to students and could be a reason for the reduced enrollment. Note that there are no changes being proposed to the existing courses.

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 Graduate Diploma in Health Industry Management is identical to the Health Industry Management Program Specialization but with an additional 10-week internship. The graduate diploma is intended for students (with required work experience) and working professionals in the health sector seeking to enhance critical-thinking and decision-making skills for managerial and leadership roles

within the health industry. It also provides growth opportunities for MHIA (Master's of Health Industry Administration) graduates interested in management and leadership positions. The HIMP prepares students for corporate/executive/ managerial roles in both private and public sectors, program/project leads, Team Leaders, Operation Managers, Marketing Manager, departmental/unit directors, lead analysts, consultants, strategic planning, and start-up/business endeavors.

The proposed changes to the Graduate Diploma, promises enhanced efficiency in course delivery, simultaneously expanding opportunities for early career professionals and experienced individuals to engage in co-learning with MHIA students to foster the exchange of ideas, challenge assumptions, and cultivate lifelong partnerships, thereby enriching the educational experience and empowering participants to navigate the complexities of the healthcare industry with agility and insight.

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 the Associate Dean Academic, the MBA Program Director and the MHIA Program Director.

d. A summary of any resource implications and how they are being addressed.
We do not anticipate any resource implications of this minor program change.

e. A summary of how students currently enrolled in the program/ diploma/certificate will be accommodated.
Students currently pursuing the Graduate Diploma will be expected to complete the diploma under the current model.

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).

Schulich School of Business
York University

Existing Program/ Diploma/Certificate Information (Change From):	Proposed Program/ Diploma/Certificate Information (Change To):
Title ~~Current text~~ ~~**Successful completion of 12.00 credits total, consisting of the following:**~~ ~~• 3 courses (9.00 credits) from the current four HIMP Elective courses,~~ ~~***AND one of the following options:***~~ ~~• One related course (3.00 credits) from the Additional Electives list~~ ~~• With a letter of approval, up to 3.00 credits of relevant graduate level course from other York Faculties~~ ~~• An approved Independent Studies Course (HIMP 6900 3.00) in the Healthcare Sector~~ ~~• A fourth course from the four current HIMP courses offered~~ **Additional Requirements:** • Must be taken concurrently with a Schulich MBA* • The diploma must be completed within one term of completing ~~graduate~~ program degree requirements ~~• All students must take a minimum of 9.00 credits of HIMP Elective Courses~~ • Equivalent of a minimum 10-week full-time internship in a healthcare	Title Current and new text Students must complete 12.00 credits total, consisting of the following Required and Elective courses, specifically: • 6.00 credits of Required courses • 6.00 credits of Elective courses Required Courses • HIMP 6130 3.00: Strategy in Healthcare • HIMP 6140 3.00: Leading Health Sector Transformation Elective Courses • MHIA 5140 1.50 Digital Health • HIMP 6150 3.00 Economics of Healthcare • MHIA: 6160 1.50 Quality and Value in Healthcare • MHIA: 6170 1.50 Performance Indicators in Healthcare • HIMP 6180 3.00 Entrepreneurship and Innovation in Healthcare • MHIA 6200 1.50 Public Policy for Healthcare • HIMP 6900 3.00 Independent Study **Additional Requirements:** • Must be taken concurrently with a Schulich MBA* • The diploma must be completed within one term of completing MBA program degree requirements • Equivalent of a minimum 10-week full-time internship in a healthcare organization. Upon approval, prior work experience and/or prior

(Revised: October 20, 2022)

organization. Upon approval, prior work experience and/or prior internship in the healthcare sector may be considered as a substitute for the 10-week internship requirement • ~~An introductory dinner workshop in September (orientation to the Canadian Healthcare System- challenges and future trends)~~ ~~HIMP Elective Courses:~~ • ~~HIMP 6130 3.00 STRATEGY IN HEALTHCARE~~ • ~~HIMP 6140 3.00 LEADING HEALTH SECTOR TRANSFORMATION~~ • ~~HIMP 6150 3.00 ECONOMICS OF HEALTHCARE~~ • ~~HIMP 6180 3.00 ENTREPRENEURSHIP AND INNOVATION IN HEALTHCARE~~ ~~Recommended Elective Courses:~~ • ~~ENTR 6605 3.00 ENTREPRENEURSHIP & NEW FIRM CREATION~~ • ~~MGMT 6800 3.00 INNOVATION THROUGH TECHNOLOGY AND DESIGN~~ • ~~MKTG 6050 3.00 MARKETING RESEARCH~~ • ~~OMIS 6750 3.00 PROJECT MANAGEMENT~~ • ~~ORGS 6350 3.00 MANAGING CHANGE~~ • ~~ORGS 6720 3.00 MANAGING TEAM DYNAMICS~~ • ~~PUBL 6800 3.00 PROGRAM EVALUATION~~	internship in the healthcare sector may be considered as a substitute for the 10-week internship requirement

Schulich School of Business
York University

Specialization/Stream Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich MBA Program

2. Name of Specialization/Stream
   Health Industry Management Program

3. Responsible Unit:
   Krembil Centre for Health Management and Leadership

4. Type of Specialization/Stream Change(s) (indicate all that apply):

X	changes to specialization/stream name
X	changes to list of required credits
X	changes to list of required courses
X	changes to list of elective courses
	retire specialization/stream
X	other (remove and edit redundant/confusing information"

5. Effective Term/Calendar Year of Proposed Change(s):
   Fall 2024

6. Rationale for Change:
Currently, the HIMP Specialization is requires that students take 3 courses from a list of 4 HIMP-specific courses and then an additional course from a list of non-health sector specific electives. A review of the specialization revealed two things: 1) that only 2 courses should be required content for HIMP students and that 2) the remaining 2 courses should be taken from a list of health-sector courses. Doing this will provide students with more flexibility in how to complete the specialization while deepening their specialization in the sector.

On top of the changes to the course requirements, this specialization is not a program and should not be labeled as such. The acronym will then change from HIMP to HIMS.

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Finally, there is a need to simplify the language of the specialization as it is currently confusing to students. Note that there are no changes being proposed to the existing courses.

7. *Please indicate how the proposed change will contribute to the academic objectives of the specialization/stream. Please provide a description of the amended learning outcomes/objectives for the specialization/stream, if applicable.*

   The HIMP is intended for students (with required work experience) and working professionals in the health sector seeking to enhance critical-thinking and decision-making skills for managerial and leadership roles within the health industry. It also provides growth opportunities for MHIA (Master's of Health Industry Administration) graduates interested in management and leadership positions. The HIMP prepares students for corporate/executive/managerial roles in both private and public sectors, program/project leads, Team Leaders, Operation Managers, Marketing Manager, departmental/unit directors, lead analysts, consultants, strategic planning, and start-up/business endeavors.

   The proposed changes to the HIMP promises enhanced efficiency in course delivery, simultaneously expanding opportunities for early career professionals and experienced individuals to engage in co-learning with MHIA students to foster the exchange of ideas, challenge assumptions, and cultivate lifelong partnerships, thereby enriching the educational experience and empowering participants to navigate the complexities of the healthcare industry with agility and insight.

8. Proposed Specialization/Stream Information:
   Please insert the current, approved specialization/stream information as it appears in the handbook on the left, and proposed specialization/stream information on the right. Please clearly and visibly indicate the changes using strikethrough (left column), bold, underlining, colours, etc. (right column).

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Existing Specialization/Stream Information (Change From):	Proposed Specialization/Stream Information (Change To):
Title: Health Industry Management Requirements ~~Successful completion of 12.00 credits total, consisting of the following:~~ • ~~Completion of the Schulich MBA core courses, PLUS~~ • ~~Successful completion of 12 credits (where a 3-credit course is typically a standard 12-week course that meets once a week for 3 hours during the fall or winter terms) consisting of the following:~~ • ~~An introductory dinner workshop in September (orientation to the Canadian Healthcare System- challenges and future trends) PLUS~~ • ~~3 courses (9 credits) from the four core HIMP courses (see below), AND~~ • ~~A fourth course from the four current core HIMP courses offered, OR~~ • ~~One related course (3 credits) from a Recommended Electives list (see below), OR~~ • ~~Up to 3.00 credits of relevant graduate level course from other York Faculties, OR~~ • ~~An Independent Studies Course HIMP 6900 (3 credits) in the Healthcare Sector. Notwithstanding the requirements outlined above, (3 out of 4 core HIMP courses etc.), it is highly recommended to take all four core HIMP courses. Each course provides a unique perspective, enriching your insights and understanding of the health industry.~~ ~~HIMP Elective Courses:~~	Title: Health Industry Management Requirements Students must complete 12.00 credits total, consisting of the following Required and Elective courses: • 6.00 credits of Required courses • 6.00 credits of Elective courses Required Courses • HIMP 6130 3.00: Strategy in Healthcare • HIMP 6140 3.00: Leading Health Sector Transformation Elective Courses • MHIA 5140 1.50 Digital Health • HIMP 6150 3.00 Economics of Healthcare • MHIA: 6160 1.50 Quality and Value in Healthcare • MHIA: 6170 1.50 Performance Indicators in Healthcare • HIMP 6180 3.00 Entrepreneurship and Innovation in Healthcare • MHIA 6200 1.50 Public Policy for Healthcare • HIMP 6900 3.00 Independent Study

• ~~HIMP 6130 3.00 STRATEGY IN HEALTHCARE~~ • ~~HIMP 6140 3.00 LEADING HEALTH SECTOR TRANSFORMATION~~ • ~~HIMP 6150 3.00 ECONOMICS OF HEALTHCARE~~ • ~~HIMP 6180 3.00 ENTREPRENEURSHIP AND INNOVATION IN HEALTHCARE~~ ~~Recommended Elective Courses:~~ • ~~ENTR 6605 3.00 ENTREPRENEURSHIP & NEW FIRM CREATION~~ • ~~MGMT 6800 3.00 INNOVATION THROUGH TECHNOLOGY AND DESIGN~~ • ~~MKTG 6050 3.00 MARKETING RESEARCH~~ • ~~OMIS 6750 3.00 PROJECT MANAGEMENT~~ • ~~ORGS 6350 3.00 MANAGING CHANGE~~ • ~~ORGS 6720 3.00 MANAGING TEAM DYNAMICS~~ • ~~PUBL 6800 3.00 PROGRAM EVALUATION~~	

9. Consultation:

Consultation took place with the Associate Dean Academic, the MBA Program Director and the MHIA Program Director.

Originator:

Joseph Mapa Signature	February 22nd, 2024 Date
Joseph Mapa Name	HIMP Specialization Area or Specialization

Schulich
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York University

Approvals:

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

Joseph Mapa	February 22nd, 2024
Signature	Date
Joseph Mapa	Krembil Centre for Health Management and Leadership
Name	Area or Specialization

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

Mike Valente	February 22nd, 2024
Signature	Date
Mike Valente	MBA Program
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date
Kevin Tasa	MPC
Name of Committee Chair	Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: David Rice, Area Coordinator Marketing
Date: March 21, 2024
Re: Retirement of the Global Retail Management Specialization and Marketing Analysis Stream

Motion: That Faculty Council approves to retire the Global Retail Management Specialization and the Marketing Analysis stream from the MBA Program

Rationale: The Global Retail Management Specialization and the Marketing Analysis stream are rarely taken at Schulich. In fact, only 2 students and 1 student have taken it in the last 2 years, respectively. It is also not popular among prospective students' preferred choices for specialization/stream as they consider the MBA program. For these reasons, the area would like to retire them. Removing them also streamlines the number of specializations/streams in the area.

Schulich
School of Business
York University

Specialization/Stream Change Proposal Form
Schulich School of Business

The following information is required for all specialization/stream 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:
   MBA

2. Name of Specialization/Stream
   Global Retail Management

3. Responsible Unit:
   MKTG

4. Type of Specialization/Stream Change(s) (indicate all that apply):

	changes to specialization/stream name
	changes to list of required credits
	changes to list of required courses
	changes to list of elective courses
X	retire specialization/stream
	other (please specify)

5. Effective Term/Calendar Year of Proposed Change(s):
   Fall 2024

6. Rationale for Change:
Please indicate how the proposed change will contribute to the academic objectives of the specialization/stream. Please provide a description of the amended learning outcomes/objectives for the specialization/stream, if applicable.

The Global Retail Management Specialization is rarely taken at Schulich. In fact, in the last 2 years, only 2 students have taken this specialization. In addition, prospective students do not identify this specialization as a preferred specialization when considering the MBA program.

Proposed Specialization/Stream Information:
Please insert the current, approved specialization/stream information as it appears in the handbook on the left, and proposed specialization/stream information on the right. Please

clearly and visibly indicate the changes using strikethrough (left column), bold, underlining, colours, etc. (right column).

Existing Specialization/Stream Information (Change From):	Proposed Specialization/Stream Information (Change To):
Title:	Title:

7. Consultation:
Consultation took place with the marketing area and the MBA program director

8. Originator:

David Rice (Area Coordinator)	Feb. 26, 2024
Signature	Date
David Rice	MKTG
Name	Area or Specialization

Approvals:

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

Markus Giesler	March 22, 2024
Signature	Date
Markus Giesler	GRM Spec. Director
Name	Area or Specialization

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

Mike Valente	March 22, 2024
Signature	Date
Mike Valente	MBA
Name of Program Director	Program

Schulich
School of Business
York University

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

Kevin Tasa	*March 28, 2024*
Signature	Date
Kevin Tasa	MPC
Name of Committee Chair	Committee

Schulich
School of Business
York University

Specialization/Stream Change Proposal Form
Schulich School of Business

The following information is required for all specialization/stream 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:
   MBA

2. Name of Specialization/Stream
   Marketing Analysis

3. Responsible Unit:
   MKTG

4. Type of Specialization/Stream Change(s) (indicate all that apply):

	changes to specialization/stream name
	changes to list of required credits
	changes to list of required courses
	changes to list of elective courses
X	retire specialization/stream
	other (please specify)

5. Effective Term/Calendar Year of Proposed Change(s):
   Fall 2024

6. Rationale for Change:
Please indicate how the proposed change will contribute to the academic objectives of the specialization/stream. Please provide a description of the amended learning outcomes/objectives for the specialization/stream, if applicable.

The Marketing Analysis Stream is rarely taken at Schulich. In fact, in the last 2 years, only 1 students have taken this specialization. In addition, prospective students do not identify this stream as a strong preference when considering the MBA program.

Proposed Specialization/Stream Information:
Please insert the current, approved specialization/stream information as it appears in the handbook on the left, and proposed specialization/stream information on the right. Please clearly and visibly indicate the changes using strikethrough (left column), bold, underlining, colours, etc. (right column).

Existing Specialization/Stream Information (Change From):	Proposed Specialization/Stream Information (Change To):
Title:	Title:

7. Consultation:

Consultation took place with the marketing area and the MBA program director

Originator:

David Rice (Area Coordinator)	Feb. 26, 2024
Signature	Date
David Rice	MKTG
Name	Area or Specialization

Approvals:

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

David Rice	Feb. 25, 2024
Signature	Date
David Rice	MKTG
Name	Area or Specialization

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

Mike Valente	March 22, 2024
Signature	Date
Mike Valente	MBA
Name of Program Director	Program

Schulich
School of Business
York University

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

Kevin Tasa	*March 28, 2024*
Signature	Date
Kevin Tasa	MPC
Name of Committee Chair	Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Pauline Shum Nolan, Professor of Finance and Area Coordinator
Date: March 13, 2024
Re: Removing of Finance specialization streams and the Financial Risk Management specialization

Motion: That Faculty Council approves the proposal to remove three streams from the Finance specialization and to retire the Financial Risk Management specialization.

Rationale: With lower MBA enrolments, the Finance Area does not want to restrict student options. Also, removing the streams will afford the Area flexibility when courses are not being offered due to sabbaticals or low enrolments. (Streams are not recorded anywhere in student records). The Area thinks students should take what suits their interests and goals, without being artificially confined by the definition of a stream.

With respect to Financial Risk Management, this was the old Financial Engineering specialization, which no longer exists. It is not possible for MBA students to fulfill this specialization as they do not have the MATH prerequisites. The courses currently listed are just for MATH students for their Financial Engineering diploma.

Specialization/Stream Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich MBA

2. Responsible Unit:
   FINE

3. Type of Specialization/Stream Change(s) (indicate all that apply):

	changes to list of required credits
	changes to list of required courses
	changes to list of elective courses
X	retire specialization/stream
	other (please specify)

4. Effective Term/Calendar Year of Proposed Change(s):
   Fall 2024

5. Rationale for Change:
   Please indicate how the proposed change will contribute to the academic objectives of the specialization/stream. Please provide a description of the amended learning outcomes/objectives for the specialization/stream, if applicable.

Finance is proposing to remove:

1) All streams except the General one within the Finance specialization:
   i. Financial Management stream
   ii. Investment Management stream
   iii. Private Wealth Management stream

2) Retire the Financial Risk Management specialization.

With lower MBA enrolments, the Finance Area does not want to restrict student options. As well, removing the streams will afford the Area flexibility when courses are not being

offered due to sabbaticals or low enrolments. (Streams are not recorded anywhere in student records anyway). The Area thinks students should be able to take what suit their interests and goals, without being artificially confined by the definition of a stream.

With respect to Financial Risk Management, this was the old Financial Engineering specialization, which no longer exists. It is not possible for MBA students to fulfill this specialization as they do not have the MATH prerequisites. The courses currently listed are just for MATH students for their Financial Engineering diploma.

Existing Specialization/Stream Information (Change From):	Proposed Specialization/Stream Information (Change To):
Title: Financial Management stream Investment Management stream Private Wealth Management stream --- Financial Risk Management specialization	Title: Retire/remove all three streams, leaving only the General stream --- Retire/remove this specialization

6. Proposed Specialization/Stream Information:

Please insert the current, approved specialization/stream information as it appears in the handbook on the left, and proposed specialization/stream information on the right. Please clearly and visibly indicate the changes using strikethrough (left column), bold, underlining, colours, etc. (right column).

7. Consultation:
For changes that include deletions or additions of courses across areas please provide evidence that appropriate consultation has taken place.

N/A

Originator:

Signature

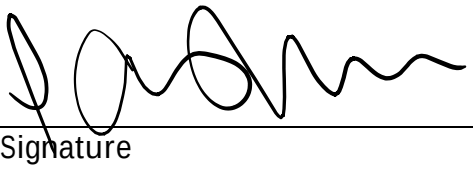
March 14, 2024
Date

Schulich School of Business
York University

Pauline Shum Nolan	Finance
Name	Area or Specialization

Approvals:

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

	March 14, 2024
Signature	Date

Pauline 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	March 21, 2024
Signature	Date

Mike Valente	MBA
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date

Kevin Tasa	MPC
Name of Committee Chair	Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Kenneth Rogers, Academic Director, Arts, Media & Entertainment Management Program
Date: March 21, 2024
Re: Curricular changes to the Graduate Diploma in Arts, Media, & Entertainment (GDAM) and ARTM Specialization

Motion:

That Faculty Council approves changes to the Graduate Diploma in Arts, Media, and Entertainment (GDAM) and Arts, Media and Entertainment Management (ARTM) specialization at the Schulich School of Business

Rationale:

The proposed changes to the GDAM and the ARTM specialization are in response to the need to adapt and update our curriculum to be more pertinent to changes occurring in the creative sector. These changes aim to reduce required courses and add electives to enhance the student experience and choice of pathway through the program. In this phase of ARTM modification, we strive to consolidate our required courses for the diploma and specialization from two 3.0 credit courses to one 3.0 credit course. The current requirement of 6.0 credits is onerous for students. We are also updating a few course titles and course descriptions to have a more direct relevance to the contemporary dynamics of the creative sector. Finally, we are adding two Marketing area electives with permission from the area coordinator. These minor modifications will contribute to the academic objectives of ARTM by creating a more streamlined student pathway and expanding student choice of electives. ARTM covers a range of sub-specializations containing students with diverse academic interests and career objectives. By reducing requirements and adding additional electives, students will have more freedom to customize their pathway through the diploma and specialization. No amendments to the learning outcomes/objectives for ARTM are part of this modification.

ARTM Course 6301 - The primary rationale for this modification is to consolidate our specialization requirements from two 3.0 courses into one single 3.0 course. As the sole required course of the ARTM specialization, the content of this course will largely remain intact, but it will now absorb a few of the essential topics and themes covered in Cultural Policy. The course content is also being revised and updated to capture the increasingly relevant themes of creative sector disruption/transformation and creativity as a business practice.

ARTM course 6340 - The title and catalog copy of this course needed to be updated to reflect changes in the field that are more contemporary. Over the top (OTT) and “streaming” content providers like Netflix, Amazon Prime and Disney+ have become a dominant topic, issue, and practice in the field that is widely known as television broadcasting, as it was referred to when the course was initially developed.

ARTM Course 6300 - We are revising our degree requirements from 6.0 to 3.0; in the process, Cultural Policy will be changed from a required course to an elective. It will no longer require prerequisites as it is no longer an essential part of the curriculum.

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: Arts, Media, and Entertainment Management

2. Effective Term/Calendar Year of Proposed Change(s): Fall 2024

3. Proposed Change(s) and Rationale:

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

The proposed changes to the ARTM Diploma Program are in response to the need to adapt and update our curriculum to be more pertinent to changes occurring in the creative sector. We are also updating a few course titles ARTM 6300, ARTM 6301, and ARTM 6340 and course descriptions to have a more direct relevance to the contemporary dynamics of the creative sector. Finally, we are adding two Marketing area electives to our specialization with permission from the area coordinator: MKTG 6220 and MKTG 6321.

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.

These changes aim to reduce required courses and add electives to enhance the student experience and choice of pathway through the program. In this phase of ARTM modification, we strive to consolidate our required courses for the specialization from two 3.0 credit courses to one 3.0 credit course. The current requirement of 6.0 credits is onerous for students. These minor modifications will contribute to the academic objectives of the ARTM Diploma by creating a more streamlined student pathway and expanding student choice of electives. The ARTM Diploma covers a range of sub-specializations containing students with diverse academic interests and career objectives. By reducing

requirements and adding additional electives, students will have more freedom to customize their pathway through the specialization. No amendments to the learning outcomes/objectives for the ARTM Diploma are part of this modification.

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.

We have consulted with the Associate Dean, Academic, Kevin Tasa, MBA Program Director, Mike Valente, and the Master's Program Committee (MPC) all at the Schulich School of Business. The changes are localized within the diploma program and will not have a significant impact on any other programs at Schulich or York University.

d. A summary of any resource implications and how they are being addressed.
These changes will have no impact on the current resource requirements for the ARTM Diploma Program.

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

For students who are currently in enrolled in the Diploma Program who have already taken ARTM 6300 Cultural Policy, this course will now count toward one of their 9.0 elective courses rather than 3.0 of their required courses. For students currently enrolled in the Diploma Program who have not taken ARTM 6300, they may now take an alternative course from the expanded list of eligible electives.

4. Calendar Copy:

Existing Program/ Diploma/Certificate Information (Change From):	Proposed Program/ Diploma/Certificate Information (Change To):
Title: Graduate Diploma in Arts, Media and Entertainment Management The Graduate Diploma in Arts, Media and Entertainment Management is earned concurrently with the Master of Business Administration.	Title: Graduate Diploma in Arts, Media and Entertainment Management The Graduate Diploma in Arts, Media and Entertainment Management is earned concurrently with the Master of Business Administration.

Students must complete 12.00 credits total, consisting of: ~~6.00~~ credits of Required Courses (see above) ~~6.00~~ credits of Electives (see above) Additional Requirements: To earn the diploma, students must have: • completed the Arts and Media specialization, within the MBA, MBA/MFA, MBA/MA, or MBA/JD program • conducted their MGMT 6100 strategy study (601) at an arts, media, or entertainment site (approval of the Arts and Media Director required) • completed the program requirements for an internship in the cultural sector Students must satisfy the requirements of both the Graduate Diploma as well as those of the MBA, MBA/MFA, MBA/MA, or MBA/JD. The diploma must be completed within one term of completing graduate program degree requirements.	Students must complete 12.00 credits total, consisting of: 3.00 credits of Required Courses (see above) 9.00 credits of Electives (see above) Additional Requirements: To earn the diploma, students must have: • completed the Arts and Media specialization, within the MBA, MBA/MFA, MBA/MA, or MBA/JD program • conducted their MGMT 6100 strategy study (601) at an arts, media, or entertainment site (approval of the Arts and Media Director required) • completed the program requirements for an internship in the cultural sector Students must satisfy the requirements of both the Graduate Diploma as well as those of the MBA, MBA/MFA, MBA/MA, or MBA/JD. The diploma must be completed within one term of completing graduate program degree requirements.

Schulich School of Business
York University

Specialization/Stream Change Proposal Form
Schulich School of Business

The following information is required for all specialization/stream 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:
   MBA program

2. Name of Specialization/Stream
   Arts, Media & Entertainment Management

3. Responsible Unit:
   ARTM

4. Type of Specialization/Stream Change(s) (indicate all that apply):

	changes to specialization/stream name
x	changes to list of required credits
x	changes to list of required courses
x	changes to list of elective courses
	retire specialization/stream
	other (please specify)

5. Effective Term/Calendar Year of Proposed Change(s):
   Fall 2024

6. Rationale for Change:
The proposed changes to the ARTM specialization are in response to the need to adapt and update our curriculum to be more pertinent to changes occurring in the creative sector. These changes aim to reduce required courses and add electives to enhance the student experience and choice of pathway through the program. In this phase of ARTM modification, we strive to consolidate our required courses for the specialization from two 3.0 credit courses to one 3.0 credit course. The current requirement of 6.0 credits is onerous for students. We are also updating a few course titles and course descriptions to have a more direct relevance to the contemporary dynamics of the creative sector. Finally, we are adding two Marketing area electives to our specialization with permission from the area coordinator. These minor modifications will contribute to the academic objectives of ARTM by creating a more streamlined student pathway and expanding student choice of electives. ARTM covers a range of sub-specializations containing students with diverse

academic interests and career objectives. By reducing requirements and adding additional electives, students will have more freedom to customize their pathway through the specialization. No amendments to the learning outcomes/objectives for ARTM are part of this modification.

7. Proposed Specialization/Stream Information:

Existing Specialization/Stream Information (Change From):	Proposed Specialization/Stream Information (Change To):
Title: Arts, Media & Entertainment Management Students must complete 12.00 credits total, consisting of: ~~•6.00~~ credits of Required Courses ~~•6.00~~ or more credits of Elective Courses (see below) Required Courses: ARTM 6301 3.00 ~~Issues in Arts & Cultural Management~~ ~~ARTM 6300 3.00 Cultural Policy~~ Elective Courses: ARTM 6340 3.00 ~~Managing in the New Broadcast World~~ ARTM 6350 3.00 The Business of Creativity in the Cultural Sector ARTM 6360 3.00 Business Solutions for Digital Media	Title: Arts, Media & Entertainment Management Students must complete 12.00 credits total, consisting of: •3.00 credits of Required Courses •9.00 or more credits of Elective Courses (see below) Required Courses: ARTM 6301 3.00 Transformation and Creativity in Media, Entertainment & Culture Elective Courses: ARTM 6340 3.00 From Network to Netflix: New Business Models in Television, Media, and Streaming ARTM 6350 3.00 The Business of Creativity in the Cultural Sector ARTM 6360 3.00 Business Solutions for Digital Media ARTM 6300 3.00 Cultural Policy MKTG 6220 3.00 The Future of Marketing MKTG 6321 3.00 Entertainment Culture and Marketing

8. Consultation:
There was direct consultation with Kevin Tasa, Associate Dean, Academic, Mike Valente, MBA Program Director, and David Rice, Area Head for Marketing regarding the inclusion of two MKTG courses as part in ARTM specialization.

Schulich School of Business
York University

Originator:

Signature	March 21, 2024 Date
Kenneth Rogers Name	AME – Academic Director Area or Specialization

Approvals:

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

Signature	March 21, 2024 Date
Kenneth Rogers Name	AME – Academic Director Area or Specialization

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

Mike Valente Signature	March 21, 2024 Date
Mike Valente Name of Program Director	MBA Program

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

Kevin Tasa Signature	*March 28, 2024* Date
Kevin Tasa Name of Committee Chair	MPC Committee

Schulich
School of Business
York University

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:
   MBA program

2. Responsible Unit:
   ARTM

3. Subject Code (Rubric) and Course Number:
   ARTM 6300

4. Credit Value:
   3.00

5. Long Course Title: Cultural Policy

6. Short Course Title: Cultural Policy

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
	other (please specify)

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

Schulich
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York University

9. Rationale:

We are revising our degree requirements from 6.00 to 3.00 credits. As a result, Cultural Policy will be changed from a required course to an elective. It will no longer require prerequisites as it is no longer an essential part of the curriculum.

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):
Title Cultural Policy Examines Canadian arts and cultural policy. Topics include the historical development of cultural policy; the formulation and execution of municipal, provincial, and federal policies; and current issues and strategies for the future in the arts and cultural industries. The course has a research focus. Where appropriate, policy models in the UK, the US, Europe, and Asia will also be analyzed. ~~Prerequisite: SB/ARTM 6301 3.00 or permission of the instructor.~~	Title Cultural Policy Examines Canadian arts and cultural policy. Topics include the historical development of cultural policy; the formulation and execution of municipal, provincial, and federal policies; and current issues and strategies for the future in the arts and cultural industries. The course has a research focus. Where appropriate, policy models in the UK, the US, Europe, and Asia will also be analyzed.

11. Enrolment Notes:

N/A

12. Consultation:

This course change is a result of the changes to the ARTM specialization, which involved extensive consultation with the MBA Program Director and Associate Dean, Academic.

13. Originator:

Signature

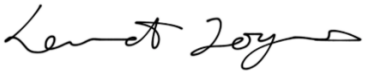
March 21, 2024
Date

Schulich School of Business
York University

Kenneth Rogers	AME - Academic Director
Name	Area or Specialization

Approvals:

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

	March 21, 2024
Signature	Date

Kenneth Rogers	AME – Academic Director
Name	Area or Specialization

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

Mike Valente	March 21, 2024
Signature	Date

Mike Valente	MBA
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date

Kevin Tasa	MPC
Name of Committee Chair	Committee

last updated: Dec 02 4:12pm EST.

Schulich School of Business

ARTM6300 F2023 **CREDITS: 3.00**

ARTM 6300 U - CULTURAL POLICY

WED 19:00-22:00 SSB S126

INSTRUCTOR

Peter Lyman

plyman@schulich.yorku.ca

416.736.2100 Ext. 55217

N319 SSB

ADMIN

Nikolaos Markakis

mark896@schulich.yorku.ca

416-736-5217

N319 SSB

This course is "taught with" GS/CMCT 6306 3.0 U

- **Materials & Outcomes**
- **Assignments**
- **Classes**
- **Expectations**
- **Schulich Policies**

BRIEF DESCRIPTION

Examines Canadian arts and cultural policy. Topics include the historical development of cultural policy; the formulation and execution of municipal, provincial and federal policies; and current issues and strategies for the future in the arts and cultural industries. The course has a research focus. Where appropriate, policy models in the UK, the US, Europe and Asia will also be analyzed. Prerequisite: SB/ARTM 6301 3.00 or permission of the Instructor.

COURSE MATERIAL

Each class will address the topics outlined below as well as reviewing the readings and assignments due. Students are expected to come prepared to discuss the readings and the findings of their research.

Required text: Richard Stursberg. The Tangled Garden: A Canadian Cultural Manifesto for the Digital Age. https://lorimer.ca/adults/product/the-tangled-garden/ (Links to an external site.) (available in paperback or as an e-book). Limited hard copies of the book are also available at the Scott Library under Reserves.

Required text: Doctorow & Giblin: Chokepoint Capitalism: How Big Tech and Big Content Captured Creative Labour Markets and How We'll Win Them Back. Hard copies available at YorkU Bookstore. Ebook available from Doctorow's website. https://craphound.com/shop/

Many readings will be drawn from *The Globe & Mail.* Schulich students receive a complimentary subscription to *The Globe* by using this link: https://subscribe.theglobeandmail.com/#/EDUSCHULSTU23

All other course readings are available either online via links or posted on Canvas in the modules section. Additional course readings are available similarly or through course reserve in the Schulich Library.

This Canvas course contains general information for Schulich students and information and materials specific to this course. Students should review regularly for frequent updates and are encouraged to propose additions to the data base. Check it frequently.

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Class Assignment #1 10%			
Assignment # 1		10%	Mon Sep 25, 2023 at 07:00pm EDT
Class Assignment #2 20%			
Assignment #2		20%	Wed Oct 18, 2023 at 11:59pm EDT
Class Assignment #3 20%			
Assignment # 3		20%	Wed Nov 8, 2023 at 07:00pm EST
Research Project outline 0%			
Final paper outline		0%	Wed Nov 15, 2023 at 07:00pm EST
Participation 20%			
Class Participation		20%	
Research Project - final 30%			
FINAL RESEARCH PROJECT		30%	Wed Dec 13, 2023 at 11:59pm EST
Sectoral Synopses		0%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Assignment # 1

Due Date: Mon Sep 25, 2023 at 07:00pm EDT

Assignment #1 (individual)

Overall, your assignment is to consider the evolution of cultural policy in Canada beginning with the *Massey Report* (1951) and then considering two subsequent reports on cultural policy at the federal level: *The Federal Cultural Policy Review* Report (1982) and the *Creative Canada Report* (2017).

To assist you in simplifying this assignment, I suggest you select an art form or cultural industry (i.e. the visual arts, theatre, film, music, writing and publishing, broadcasting/ television) that is addressed by the Massey-Levesque Commission and that particularly interests you. Start with your particular field of interest and look at the reports through the lens of the report's comments on and response (recommendations) in your field.

Describe the situation for your art form/field of inquiry in the late 1940s including any national cultural institutions related to your field that existed at the time (i.e. for the visual arts: the National Gallery of Canada and for film: the National Film Board of

Canada, the CBC – particularly with respect to music and drama) and each report's recommendations related to the field you are examining.

Specifically, consider the impact and changes in the art form/industry over the period of the three reports and assess the reports' impact on cultural policy in retrospect. (Be sure to include how the situation for that art form changed and how policies have evolved over the 65+ year span between Massey and Creative Canada.)

The first part of the assignment is to consider what the context was for each of the three reports, focussing on your chosen field of inquiry with respect to existing infrastructure; the situation with respect to the art form and artists; threats, challenges and opportunities at the time each report was written. (This should be very brief and should consider key issues such as the current definition of the art form at the time; the economic environment for creators and producers, etc.; existing infrastructure; considerations of cultural diversity and representation; indigeneity; local, national and international objectives.)

Questions related to Assignment #1 introduced in class 1, due 2 days before class 3

- What were the stated objectives of the Massey Commission? What did the commission have to say about the international, national and regional situation for the arts at the time? What did it have to say about cultural diversity?
- What was the government's initial reception to the report?
- What are the most enduring legacies of the Massey Commission? What strike you as recommendations that would not be appropriate in Canadian government policy formation today?
- What does the Applebaum-Hebert commission feel must be addressed with respect to:
    1. individual artists;
    2. the cultural industries in Canada
    3. the role of national institutions and programs
    4. the relationship between government and federal cultural institutions
- What are the policy tools most often used by each of the national cultural institutions which, in the Creative Canada framework, make up a section of the federal cultural policy toolkit?
- What are the policy implications, if any, of Creative Canada's language shift from "cultural industries" to "creative industries."

Approx. 3-4 pages double-spaced

Value: 10%

Assignment #2

Due Date: Wed Oct 18, 2023 at 11:59pm EDT

Assignment # 2 (collaborative)

Examine the impact of cultural policy on one arts or cultural organization with which you are familiar, or which interests you. The organization must be cleared with Professor Lyman **by the end of the third class**. Be sure to include the organization's engagement with cultural diversity as part of your analysis. While the written portion of this assignment is due in Class 6, all members of the group will collectively present this assignment in Class 8.

Presentations should be **6-7 minutes maximum.**

This assignment is collaborative, i.e. 3-4 students work together on the assignment, including an account of their experience working together (identifying who did what and why)

Approx. 5-6 pages double-spaced

Value: 20%

Assignment # 3

Due Date: Wed Nov 8, 2023 at 07:00pm EST

Assignment #3 (individual)

Select a major policy area for review; describe the policy issues and what recent or historical policy changes were made; and assess their relative success. Policy areas can include a specific industry sector, a specific arts discipline, a specific policy measure (e.g. support for distribution), a specific theme (e.g. gender diversity), or a specific institution (as long as it was not treated by anyone in a previous assignment). Time frames are open, though it must have occurred in the past so that you can look at the results at least in a preliminary fashion.

You should also identify any recent major report(s) on your specific area written in the last decade, include its/their key recommendations in your analysis.

Approx. 5-6 pages double-spaced

Value: 20%

Final paper outline

Due Date: Wed Nov 15, 2023 at 07:00pm EST

Each student must complete a final research project in order to meet the course requirements. Students may also select a topic of their choice related to the course readings, discussions, etc. in consultation with Prof. Lyman. Students are to choose a topic and confirm their final research project with Prof. Lyman with a 1-page written proposal indicating (a) topic, (b) approach and methodology, and (c) references, bibliography, and sources no later than November 15. (See final research project options listed in final research paper)

N.B. Exchange and foreign students are welcome to choose a topic relevant to their experience – the topic should be cleared with Prof. Lyman.

Class Participation

Your Participation Grade will be based on your attendance, contributions to in-class discussions, presentations, interactions with guests, and awareness of issues in required readings. Your participation grade will be assigned by the instructor based on these factors.

FINAL RESEARCH PROJECT

Due Date: Wed Dec 13, 2023 at 11:59pm EST

FINAL RESEARCH PROJECT OPTIONS

In your final research project, you are encouraged to build upon the research you have already undertaken throughout the course of this class. You may select one of the following two options, both of which are designed to offer a framework for analysis and a wide range of choice with respect to focus. Additionally, you may choose a topic of particular interest to you

that deals with cultural or communications policy and builds upon the work that you have done in class. Whatever your choice it must first be approved by Prof. Lyman no later than November 14th.

Option # 1 – SECTORAL ANALYSIS

Note: Using one of the sectoral synopses available on the course website, update the cultural policy time line for your discipline/subject of interest and provide an analysis of current key issues and trends for the sector, addressing the questions below. The assignment should build upon the current sectoral time-line, updating the timeline with respect to policy-related actions. What have been the key policy decisions for this sector since 2010? What has been their impact? Consider how issues in your sector are addressed in federal, provincial and municipal jurisdictions. Use both primary and academic sources to support your position. (The time-line should include links to relevant websites, using the format of the time-line posted on Canvas under Sectoral Synopses).

In addition to the updates to the timeline, you should include a discussion and overview of what has changed and of current issues, addressing the following questions:

- What are the industrial, political, economic, technological and social circumstances that inform both the issues and the policy decisions?
- How has the broader policy environment (at each government level) shaped policy inputs and outcomes in the sector?
- What are the outstanding or future issues for this sector that still need to be addressed at the federal policy level?

Option # 2 – POLICY RECOMMENDATIONS

For this assignment, you will prepare a Policy Discussion Paper complete with policy recommendations for a federal, provincial or municipal cultural policy issue. Use both primary and academic sources to support your position. The recommendations should be supported by an analysis of the existing policy(ies), evidence as to why the current policy should be changed, what consultations were or need to be undertaken with the affected stakeholders, the budget implications for the government if any, and what communications strategy will be deployed to encourage their acceptance.

Federal – Assume the role of Deputy Minister for the Department of Canadian Heritage. Based on the recent issues/activities with respect to your portfolio, identify an issue on your government's agenda and develop a set of recommendations for your Minister.

Possible topics could include:

- Mandate for the new minister as a run-up to the next federal election.
- Development of a new policy on foreign ownership of Canadian content or Canadian distribution channels across creative industries.
- Mechanisms for funding and revisions to the mandate of CBC.
- How the agencies receiving additional arts funding should deploy it, e.g. Canada Council for the Arts; Department of Canadian Heritage, CBC, NFB.
- Incentives and support for the Canadian creative industries in your particular area of interest.
- Culture and Canada's foreign policy.

Provincial – Assume the role of Deputy Minister for the Ontario Ministry of Culture. Based on the recent issues/activities with respect to your portfolio, identify an issue on your government's agenda and develop a set of recommendations for your Minister.

Possible topics might include: responding to the government's political agenda to cut waste and spending in general; arts education (addressing the concerns raised in the 2008 People for Education report available on the course website); fine tuning the eligibility requirements of film and television tax incentives; the future of the Ontario Cultural Attractions Fund, etc.

Municipal – Assume the role of Executive Director of the Culture Division of the City of Toronto. With reference to the recent evaluation of arts spending, the Division's strategic plan, and recent activities under your portfolio, identify key issues for Council to consider.

These may include the role of festivals in Toronto cultural life, the role of city-owned facilities, the role of Toronto's Music Office, or analysis of the TAC's current cultural plan with recommendations for strategic development of its new plan, as it embarks upon its next planning process for 2016-2025 (http://www.torontoartscouncil.org/publications/tac-strategic-plan-2016-2025), etc.

Papers should be 8-12 pages (no longer than 12), double spaced, and no smaller than 11pt font. If selecting Option #1: Sectoral Analysis, please use single spacing for the timeline portion of your paper.

Sample papers:

Schulich - AI and the arts-1.pdf

Status of the Artist and Canadian Cultural Labour-3.pdf

Sectoral Analysis - Final ARTM6300.pdf

Sectoral Synopses

Status of the Artist and the Cultural Labour Force.doc

The Canadian Sound Recording.doc

The Canadian Radio Broadcasting Industry.doc

The Canadian Periodical Industry.doc

The Canadian Film Video Industry.doc

Review of Cultural Policies - Federal, CCA, International spreadsheet.doc

Museums Parks & Heritage Sites.doc

Multiculturalism Related Issues.doc

Issues Related to Technology.doc

Cultural sovereignty and diversity.doc

Book Publishing sectoral analysis.doc

Copyright Overview.doc

GRADING SCHEME

A+	100%	to	90%
A	< 90%	to	85%
A-	< 85%	to	80%

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

CLASS-BY-CLASS SYLLABUS

Class 1 - COURSE INTRODUCTIONS (IRL)

OVERVIEW: Class 1

INTRODUCTIONS

Introduction to Public & Cultural Policy and *Chokepoint Capitalism*

Date: September 13, 2023

In attendance: **John Drinkwater**, Course Research Assistant

Overview

This ground-levelling introductory session will provide definitions of public policy, cultural policy, and the cultural and creative sectors as they exist in Canada today. It will also outline the historic role of cultural policy in Canada as well as the mechanisms by which policy is developed, shaped, and implemented.

An understanding of cultural policy necessitates an understanding of how, by whom, and under what circumstances policy decisions are made in Canada. To implant a basic level of understanding, we'll provide an overview of how Canada is governed and describe the major instruments that make up a 'policy toolkit' in the support of arts and culture. It provides a framework for examining these policy instruments in practice in specific cultural sectors in upcoming classes.

Class 1 will also be an opportunity to learn more about each other as peers and potential colleagues. Please be prepared to share your answers to the following:

What is your academic/work background?
What drew you to this course/what are you most interested in learning about through this course?
Discuss what would be the most effective argument for a change of cultural policy – the argument that more money is needed is not a good enough reason.

You will be briefed on the course syllabus, online protocols, and expectations for written assignments. Instructions will be given for Assignment 1 (due **Monday, September 25**).

Readings (required before class #1)

Massey Commission: *Canadian Encyclopedia* **https://www.thecanadianencyclopedia.ca/en/article/massey-commission-emc (Links to an external site.) (https://www.thecanadianencyclopedia.ca/en/article/massey-commission-emc)**
Richard Stursberg. *The Tangled Garden: A Canadian Cultural Manifesto for the Digital Age.* Pages 7-17 ("Introduction"). A pdf of this chapter is available under module 1.
Giblin, Rebecca, and Cory Doctorow. "Big Business Captured Culture." *Chokepoint Capitalism*, Beacon Press, 2022, pp. 2–19.

Mandate letter to Minister of the Department of Canadian Heritage: **https://pm.gc.ca/en/mandate-letters/2021/12/16/minister-canadian-heritage-mandate-letter (https://pm.gc.ca/en/mandate-letters/2021/12/16/minister-canadian-heritage-mandate-letter)** .

Questions to consider:

1. What are the most enduring legacies of the Massey Commission? What strikes you as recommendations that may not fit today's public positioning of Canadian governments?
2. What is the most enduring challenge to Canadian cultural policy according to Stursberg, and how has Canada addressed this challenge?
3. How would you critique the thesis of "Chokepoint" in defense of the firms exercising their power to influence who benefits from cultural output?
4. Are the priorities for the Heritage Minister appropriate to today's circumstances?

Post class questions requiring written answer (less than a half of an email page**):**

1. List your top three in order of your background and/or interests in cultural policy from these groupings:
    1. Broadcasting regulation, tax credits and the film and TV production policy
    2. Development of creative industries, including music, books, magazines, and games
    3. Support of arts institutions – museums/galleries, performing arts, and heritage
    4. Support of the artist, creator in an increasingly diverse world.
    5. Support for journalism, newspapers, and regulation of social media
    6. National and international efforts to rebalance the beneficiaries of arts and culture toward the creators and away from the large, dominate distributors.
2. Provide your own justification as to why you have selected those three subjects.

Class 2 - THE ONLINE STREAMING ACT (IRL)

OVERVIEW: Class 2

ONLINE STREAMING ACT

Date: September 20, 2023

Guest:

Peter Grant, member of the Broadcasting and Telecommunications Legislative Review Panel (BTLRP - Yale Commission) and lead communications lawyer at McCarthy Tetrault

Overview

The Online Streaming Act (formerly Bill 10, then 11) became law on April 27, 2023. In this class, we focus on this quite complex bill to show how regulation has been applied in the broadcasting world in Canada, and the ways in which it has been used to increase the amount of Canadian content there is on television and radio (music). The essence of the legislation is to regulate the large, foreign streaming services consistent with TV broadcasting in Canada.

Broadcasting services initially used publicly owned spectrum which was finite. Therefore, there had to be a way of regulating its allocation for broadcasting purposes. Otherwise, total confusion would have reigned, and viewers would not have been able to receive the radio (then TV) signals. In Canada, the Canadian Radio and Telecommunications Commission (CRTC) awarded licences to use the limited spectrum to applicants who committed the most to Canadian content. Licence holders were legally obliged to meeting the minimum requirements for Canadian content (50% overall and 60% in prime time - 6pm to midnight).

While the first broadcasters were all “over-the-air”, the advent of cable television enabled the distribution of broadcasting services including US border stations. Since cable operators enjoyed a monopoly over the geographic area they served, they were also regulated so they would make their own contribution to Canadian content. That included “must carry” provisions that guaranteed Canadian broadcasters access to cable household subscribers. Satellite direct-to-home distributors later offered an alternative to cable, and then the telephone companies offered another alternative (via copper pair or fibre optic).

Then came the internet and the capability of all the distributors to act as internet services providers (ISP) and “stream” television services to home and mobile devices. The CRTC determined that streaming services available over broadband networks were not considered “broadcasting” so were unregulated. However, broadband streaming services clearly distribute television programming, so the *Online Streaming Act’s* purpose is to bring this form of distribution into the regulatory fold.

In this class, students will be organized into two groups to familiarize themselves with the regulatory side of Canadian television broadcasting. Roughly, the three subjects will be:

The rationale for creating the new class of broadcasting service – online streaming services; it also means making the distinction between content streaming services and social media platforms that transmit mainly User Generated Content.

The process from here, i.e., what the CRTC is supposed to establish as regulations for the streaming companies. How to approximate the conventional television services as to meeting thresholds of support for Canadian content. And what does the governance model look like.

The potential responses by streaming services to comply with the legislation, in particular depending on whether they will be able to retain ownership over the content they commission. That depends on the definition as to what qualifies as Canadian programming, e.g., whether the creator (producer) of the program would need to be Canadian-owned and controlled.

Readings *(required):*

Richard Stursberg. 2019. *The Tangled Garden: A Canadian Cultural Manifesto for the Digital Age,* p.41-59 (“Creating the Garden”)

Excerpts from Broadcasting and Telecommunications Legislative Review Panel in 2020, p.131-134, p.143-147, and p.150-152 [Link under Module 2]

Grant, Peter S., and Grant Buchanon. *The Broadcasting Act: Incorporating the Online Streaming Act - Text and Commentary.* McCarthy Tétrault LLP, 2023, p.2-5 and p.110-114 **https://www.mccarthy.ca/en/insights/books-guides/broadcasting-act-incorporating-online-streaming-act-text-and-commentary-2023 (https://www.mccarthy.ca/en/insights/books-guides/broadcasting-act-incorporating-online-streaming-act-text-and-commentary-2023) .**

Summary table of Grant’s paper that highlights the main provisions for review by the CRTC. [Link under Module 2]

Ontario Creates, Regulatory Amendments to Ontario’s Film and Television Tax Credits, Aug 24, 2023: **https://www.ontariocreates.ca/uploads/home/photo-gallery-News/Eng/Ontario-Creates-Stakeholder-Bulletin-Film-TV-Regs_2023-08-24.pdf (https://www.ontariocreates.ca/uploads/home/photo-gallery-News/Eng/Ontario-Creates-Stakeholder-Bulletin-Film-TV-Regs_2023-08-24.pdf)**

Readings (*recommended*):

Raman-Wilms, Menaka. *How a New Canadian Law Will Change What’s on Your Netflix*. May 2, 2023, **https://www.theglobeandmail.com/podcasts/the-decibel/article-how-a-new-canadian-law-will-change-whats-on-your-netflix/. (https://www.theglobeandmail.com/podcasts/the-decibel/article-how-a-new-canadian-law-will-change-whats-on-your-netflix/)**

Geist, Michael. *Why the Senate Should Restore the User Content Amendment and Send Bill C-11 Back to the House of Commons.* 4 Apr. 2023, **https://www.michaelgeist.ca/2023/04/why-the-senate-should-restore-the-user-content-amendment-and-send-bill-c-11-back-to-the-house-of-commons/ (https://www.michaelgeist.ca/2023/04/why-the-senate-should-restore-the-user-content-amendment-and-send-bill-c-11-back-to-the-house-of-commons/) .**

Dowling, Amber. “The Great Bill C-11 Television Revolution That No Streaming Service Wants to Talk About.” *The Globe and Mail*, 1 Sept. 2023. *theglobeandmail.com*, **https://www.theglobeandmail.com/arts/film/tiff/article-the-great-bill-c-11-television-revolution-that-no-streaming-service/ (https://www.theglobeandmail.com/arts/film/tiff/article-the-great-bill-c-11-television-revolution-that-no-streaming-service/)** .

Questions to consider:

1. What policy tools were used and how in establishing, as Stursberg’s writes, the cultural ‘garden’ in Canada prior to the emergence of the FAANGs?
2. How does broadcasting regulation help the development and marketing of Canadian content through financial incentives? How is it expected to be furthered or otherwise affected by the regulation of streaming services?
3. Is it a new fairness or does it depart too much from traditional broadcasting and cultural policy? Are these policies still valid in the digital age?

Class 3 - UNPACKING THE CULTURAL POLICY TOOLKIT – HISTORICAL PERSPECTIVE (IRL)

OVERVIEW: Class 3

UNPACKING THE CULTURAL POLICY TOOLKIT: CANADIAN FEDERAL CULTURAL POLICY – HISTORICAL PERSPECTIVE: Massey and Applebaum: their predecessors and their successors.

Date: Wednesday September 27, 2023

Guests: **Joyce Zemans** (Senior Scholar & University Professor Emerita MBA Program in Arts, Media & Entertainment Management)

Overview:

Following our introduction to Canadian cultural policy and the cultural policy toolkit, this class examines Canada’s historic development of cultural policy, with a focus on *federal* cultural institutions. The class will examine the evolution of cultural policy in Canada, its context, its objectives and the way in which policy evolves.

The class will start with a timeline of the policies in Canada that led to the creation of the Massey-Levesque Royal Commission (1951) and will compare that report with the 1982 Federal Cultural Policy Review Commission’s Report (Applebaum-Hébert). We will also consider, briefly, several later documents including the 1999 *Sense of Place* report and the government’s response to it: *Connecting to the Canadian Experience: Diversity, Creativity and Choice*; as well as the *Creative Canada Policy Framework: The Path Forward* (2017).

The class will compare the Canadian model vs. particularly those of Europe, the Commonwealth countries and the U.S. We will also consider the development of the Universal Declaration on Cultural Diversity and more recent policies that have shaped Canadian cultural policy in its development and evolution.

After Prof Zemans’ presentation, we will engage in a fulsome discussion. Please come prepared to engage having done the readings and handed in your first written assignment (due Sept. 25) and be ready to consider, in particular, the specific context with respect to geography, provincial vs. federal jurisdiction, diversity and representation, etc. that determined the shape and content of the key moments in policy history: 1951; 1982 and 2001.

Readings (*required unless otherwise indicated):*

Report of the Royal Commission on National Development in the Arts, Letters and Sciences 1949 – 1951 (1951) p.xxi – p.19 ("Letter from the Prime Minister"; "The Nature of the Task"; and "The Forces of Geography") **https://www.collectionscanada.gc.ca/massey/h5-400-e.html(Links to an external site.) (Links to an external site.) (https://www.collectionscanada.gc.ca/massey/h5-400-e.html)**

How broad was the Massey's Commission's remit? Why was this study initiated at this time? How do you think it has shaped your experience of Canadian culture?

BC Campus. A Culture under Siege? **https://opentextbc.ca/postconfederation/chapter/10-14-a-culture-under-seige/(Links to an external site.)(Links to an external site.) (https://opentextbc.ca/postconfederation/chapter/10-14-a-culture-under-seige/)**

Consider the relevance of broadcasting in the early days of Canada. What was the environment in which radio and film production developed in Canada? What were the principal challenges?

Applebaum-Hébert Report. *Canadian Encyclopedia.* **https://www.thecanadianencyclopedia.ca/en/article/applebaum-hebert-report-emc(Links to an external site.)(Links to an external site.) (https://www.thecanadianencyclopedia.ca/en/article/applebaum-hebert-report-emc)**

Note: There is a factual error in this report – see if you can spot it.

Come prepared to discuss what had changed in Canada since the Massey report and what were the pressing issues for Canadian culture in the early 1980s that The Applebaum-Hébert Report attempted to address, particularly with respect to the situation of individual artists and arts organizations.

United Nations Educational, Scientific and Cultural Organization (UNESCO), *Universal Declaration on Cultural Diversity*(2001) - **http://portal.unesco.org/en/ev.php-URL_ID=13179&URL_DO=DO_TOPIC&URL_SECTION=201.html (Links to an external site.) (http://portal.unesco.org/en/ev.php-URL_ID=13179&URL_DO=DO_TOPIC&URL_SECTION=201.html)**

Why did Canada become involved and committed to the creation of the Universal Declaration on Cultural Diversity?

Recommended readings

Kelly Wilhelm. 2019. A Balancing Act: Supporting the Arts in Canada. *The Philanthropist.* **https://thephilanthropist.ca/2019/05/a-balancing-act-supporting-the-arts-in-canada/ (Links to an external site.)(Links to an external site.) (https://thephilanthropist.ca/2019/05/a-balancing-act-supporting-the-arts-in-canada/)**

Note: this article offers a good overview of many of the issues we will be discussing. It's a quick read and worth it, particularly with respect to the role of private sector funding in the Canadian arts landscape today.

See also 3 books recommended for those who want to dig deeper:

Monica Gattinger, *The Roots of Culture, the Power of Art: The First Sixty Years of the Canada Council for the Arts*, McGill Queen's Press, 2017

An excellent history of the Canada Council

Maria Tippett, *Making Culture, English-Canadian Institutions and the Arts before the Massey Commission*, U of Toronto Press, 1990

Reveals the breadth, depth, and character of cultural activity in Canada before 1950

Jeffrey D. Brison, ***Rockefeller, Carnegie, and Canada: American Philanthropy and the Arts and Letters in Canada***, McGill-Queen's University Press, 2005

This book examines the relationship between American wealth [represented by the massive Carnegie and Rockefeller philanthropic foundations] and Canadian culture in the days preceding the advent of consistent federal support for the arts and letters in Canada.

Note: Assignment #1 is due two days before this class. Assignment #2 (due in class 6, with presentations in class 7 and 8) will be re-introduced.

Class 4 - THE ONLINE NEWS ACT (ZOOM)

OVERVIEW: Class 4

Online News Act

Date: Wednesday October 4, 2023

Guests:

Marla Boltman, Executive Director and Spokesperson at Friends of Canadian Broadcasting

Paul Deegan, President & CEO, News Media Canada

Overview:

In this class, we look at two important subjects. The first is the **future of the news content and distribution platforms and the role of public policy to support news providers in Canada** – newspapers in their physical and electronic manifestations, and radio and television news and news journalism. Preserving the integrity of the news – and with it, our democracy – is a broader cultural policy issue. This first topic is closely tied with the recent passage of Bill C-18, *The Online News Act.*

Part of the issue is **financial support for traditional news media**. The Australian model consists of legislation to force Google, Facebook, et. al. to negotiate better terms of trade with newspapers, i.e., pay more for access to their content. Originally, the social media giants made deals with several Canadian newspaper groups to avoid a less favourable financial deal with them. However, Facebook is playing hardball, and denying access to Canadian news media. How is that working? Will there be a long court battle over anti-competitive behaviour? Can instead Canada apply the corporate tax incentive that is a disincentive for Canadian advertisers to buy ad space on foreign media – as is the case for foreign magazines and US TV border stations when the original tax change was made in 1976 (so-called Bill C-58).

The second big policy issue for the tech giants is the **anti-democratic use made of their platforms to spread fake news and rumours available to their users**. The insatiable appetite for more data about customers – even if its permission is granted (what choices do consumers have?) - is a threat to privacy and democracy as well as compounding the importance today of data that enables more granular targeting of product and service markets. What the impact is and whether and how it should be regulated are policy concerns for government.

Readings (required):

Richard Stursberg. 2019. *The Tangled Garden: A Canadian Cultural Manifesto for the Digital Age*. Pages 139-161 ("The Sleepy Gardeners").

Curry, Bill. "Ottawa, Quebec Halt Advertising on Facebook, Instagram over Bill C-18 Standoff." *The Globe and Mail*, 5 July 2023. ***www.theglobeandmail.com*** **(http://www.theglobeandmail.com)** , **https://www.theglobeandmail.com/politics/article-ottawa-freezes-advertising-on-facebook-instagram-over-bill-c-18/ (https://www.theglobeandmail.com/politics/article-ottawa-freezes-advertising-on-facebook-instagram-over-bill-c-18/)** .

Giblin, Rebecca, and Cory Doctorow. *Chokepoint Capitalism: How Big Tech and Big Content Captured Creative Labor Markets and How We'll Win Them Back*. Beacon Press, 2022. CH. 3 pp. 39-51

Janna Anderson and Lee Rainie. "3. Concerns about democracy in the digital age". *Pew Research Center*, 21 February 2020, **https://www.pewresearch.org/internet/2020/02/21/concerns-about-democracy-in-the-digital-age/ (https://www.pewresearch.org/internet/2020/02/21/concerns-about-democracy-in-the-digital-age/)**

Freeman-Grist, Dylan. "Google and Facebook Act Tough in Bill C-18 Standoff Because They Are Desperate." *The Globe and Mail*, 19 July 2023. ***www.theglobeandmail.com***

(http://www.theglobeandmail.com)
, **https://www.theglobeandmail.com/business/commentary/article-google-facebook-bill-c-18-standoff-desperate/** (https://www.theglobeandmail.com/business/commentary/article-google-facebook-bill-c-18-standoff-desperate/) .
Tusikov, Natasha. "Corporate News Blockades Underscore the Need to Regulate Big Tech and Rebalance Power." *The Globe and Mail*, 28 Aug. 2023. ***www.theglobeandmail.com*** (http://www.theglobeandmail.com) , **https://www.theglobeandmail.com/opinion/article-corporate-news-blockades-underscore-the-need-to-regulate-big-tech-and/** (https://www.theglobeandmail.com/opinion/article-corporate-news-blockades-underscore-the-need-to-regulate-big-tech-and/) .

Readings (Recommended):

Geist, Michael. *Media Chaos: How the Government's Legislative Plans to Support Canadian Media Have Backfired Spectacularly.* 28 June 2023, **https://www.michaelgeist.ca/2023/06/mediachaos/** (https://www.michaelgeist.ca/2023/06/mediachaos/) .
Woolf, Marie. "Facebook to Pull News Access in Canada as Bill C-18 Becomes Law." *The Globe and Mail*, 22 June 2023. ***www.theglobeandmail.com*** (http://www.theglobeandmail.com)
, **https://www.theglobeandmail.com/politics/article-ottawa-google-bill-c-18/** (https://www.theglobeandmail.com/politics/article-ottawa-google-bill-c-18/) .
Section 6 about "Newspapers" in DM@X Nordicity Report 2022, which can be accessed here: **https://www.digitalmediaatthecrossroads.com/pdfs/nordicitypresentation2022.pdf?v1708676858** (https://www.digitalmediaatthecrossroads.com/pdfs/nordicitypresentation2022.pdf?v1708676858)
Public Policy Forum. January 2017. *The Shattered Mirror.* Pages 5-14 ("Introduction"). **https://www.documentcloud.org/documents/3421460-Shattered-Mirror-Report-on-news-media.html (Links to an external site.)** (https://www.documentcloud.org/documents/3421460-Shattered-Mirror-Report-on-news-media.html)

Questions to consider:

1. Does the decline of the classic news industry pose a threat/decline in the democratic function of the country? Can a gap in the classic news industry be filled by new forms of digital communication?
2. Do the policies and incentives put forward by the federal government largely redress the decline of news journalism in Canada?
3. Should social media platforms be regulated to combat the spread of fake news? If so, what policy measures should be implemented and how? What challenges might there be for implementation regarding free speech/censorship and data privacy?

Class 5 - INDIGENEITY AND CULTURAL PLANNING (ZOOM)

OVERVIEW: Class 5

Indigeneity and Cultural Planning

Date: Wednesday October 11, 2023

Guests:

Cynthia Wesley-Esquimaux, Chair on Truth and Reconciliation, Lakehead University

Ginger Gosnell-Myers, Fellow: Urban Indigenous Policy, Planning, & Decolonization

Overview:

Many cities in the US and Canada actively develop cultural plans, sometimes variants of cultural plans. The variations occur when they are called cultural strategies, or when they are focused on the development of a cultural facility, like a cultural or arts centre. The plans are more like strategic plans or guideposts to a number of municipal functions and responsibilities, like public art, heritage protection and display, performing arts spaces and centres, placemaking of neighbourhoods, etc.

Of great importance to municipalities in Canada and elsewhere is the effectiveness of the citizen engagement process. No longer is it acceptable to stick to a "mainstream" society, when there are many communities formerly ignored because of their economic status, gender, or race. Of particular importance to Canada are the relationships of government institutions at the local level and the nearby Bands and their reserves of communities – or if the community is the focal point of distant Indigenous communities need to access institutions of higher learning or health and social services, etc.

This class examines strategies for moving towards decolonization by respectfully engaging with and involving Indigenous nations in the cultural planning process. Our guest lecturers will offer pragmatic insights from their experience reimagining cultural planning in a manner that recognizes and empowers Indigenous perspectives.

Readings (required):

Brennan, Terri-Lynn, and Annalee Adair. *Challenging Consulting Norms and Hearing Communities' Stories*. **https://artsconsultants.ca/podcast/challenging-consulting-norms-and-hearing-communities-stories/ (https://artsconsultants.ca/podcast/challenging-consulting-norms-and-hearing-communities-stories/)** .

Curve Lake First Nation. *Consultation and Accommodation Standards*. 2013, pp. 2–4, 7–10. **https://www.selwyntownship.ca/en/township-hall/resources/Building__Planning/Curve-Lake-First-Nation-Consultation-and-Accommodations-Standards.pdf (https://www.selwyntownship.ca/en/township-hall/resources/Building__Planning/Curve-Lake-First-Nation-Consultation-and-Accommodations-Standards.pdf)** .

Readings (Recommended):

Inclusive and Equitable Engagement: Case Studies, Lessons Learned and Best Practices — The Western Planner (https://www.westernplanner.org/2021/2021/4/9/inclusive-and-equitable-engagement-case-studies-lessons-learned-and-best-practices) (2021)

Umemoto, K. (2001). Walking in Another's Shoes: Epistemological Challenges in Participatory Planning. Journal of Planning Education and Research 21:17-31. Association of Collegiate Schools of Planning [link to pdf in canvas]

Questions to consider:

1. In the context of cultural planning, how can the principles of Indigenous knowledge systems be integrated with contemporary urban development and policy frameworks?
2. What would be your main guidelines to recommend anyone planning engagement with an Indigenous community where a cultural plan or development initiative is being planned?
3. How do such principals resonate with the engagement with other BIPOC communities?

Class 6 - Canada Council Digital Strategy Fund, Technology, and AI (IRL)

OVERVIEW: Class 6

Canada Council's Digital Strategy Fund

Artificial Intelligence: Cultural and Ethical Issues

Date: Wednesday October 18, 2023

Guest:

Gabriel Zamfir-Enache, Director of Research, Measurement and Data Analytics at Canada Council for the Arts

Laurie Biderman, Senior Strategic Advisor, Arts Granting Programs Division at Canada Council for the Arts

Mila Dechef-Tweddle, Director at Nordicity

Caitlin Cross, Consultant at Nordicity, and lead on a Canada Council project on AI

Overview:

In the contemporary landscape of the entertainment and media industries, the convergence of technology and culture is rapidly reshaping traditional paradigms. This class delves into the multifaceted impact of artificial intelligence (AI) on these industries, examining the interplay between economics, technology, and creativity.

We take a critical look at the transformative potential of AI in redefining artistic creation and its subsequent effects on creative labour markets. Topics for discussion include AI-generated art and music, algorithmic content curation, and generative language models. Students will also grapple with ethical considerations, including the implications of AI for copyright and intellectual property rights, the emergence of deepfakes and their implications for authenticity, and the algorithmic biases that can shape cultural narratives.

We will be joined by guest lecturers who are involved in researching AI within the Canadian cultural context.

Readings (required):

O'Kane, Josh. "Generative AI Copyright Lawsuits Likely Won't Yield Results for Creative Workers Any Time Soon." *The Globe and Mail*, 22 July 2023. ***theglobeandmail.com*** **(http://www.theglobeandmail.com)** , **https://www.theglobeandmail.com/arts/books/article-generative-ai-copyright-lawsuits-likely-wont-yield-results-for/ (https://www.theglobeandmail.com/arts/books/article-generative-ai-copyright-lawsuits-likely-wont-yield-results-for/)** .

Lederman, Marsha. "The Robots Are Coming for Us, and the Actors – True to Form – Are Fighting Back." *The Globe and Mail*, 19 July 2023. ***theglobeandmail.com*** **(http://www.theglobeandmail.com)** , **https://www.theglobeandmail.com/opinion/article-the-robots-are-coming-for-us-and-the-actors-true-to-form-are-fighting/ (https://www.theglobeandmail.com/opinion/article-the-robots-are-coming-for-us-and-the-actors-true-to-form-are-fighting/)** .

"ChatGPT: Advocacy Group Pushing for Ethical Use of AI Wants New Versions Blocked." *The Globe and Mail*, 14 July 2023, **https://globe2go.pressreader.com/article/281977497091617 (https://globe2go.pressreader.com/article/281977497091617)** .

https://canadacouncil.ca/funding/strategic-funds/digital-strategy-fund (https://canadacouncil.ca/funding/strategic-funds/digital-strategy-fund)

Readings (Recommended):

Reed Smith LLP. "Entertainment and Media Guide to AI." *ReedSmith*, 2023, **https://www.reedsmith.com/en/perspectives/ai-in-entertainment-and-media (https://www.reedsmith.com/en/perspectives/ai-in-entertainment-and-media)** .

Brittain, Blake. "AI-Generated Art Cannot Receive Copyrights, US Court Says." *Reuters*, 21 Aug. 2023. ***reuters.com*** **(http://www.reuters.com)** , **https://www.reuters.com/legal/ai-generated-art-cannot-receive-copyrights-us-court-says-2023-08-21/ (https://www.reuters.com/legal/ai-generated-art-cannot-receive-copyrights-us-court-says-2023-08-21/)** .

O'Kane, Josh. "B.C. Film Unions to Vote on Contract Some Fear Will Lead to AI Replacing Actors throughout the Sector." *The Globe and Mail*, 16 July 2023. ***theglobeandmail.com*** **(http://www.theglobeandmail.com)** , **https://www.theglobeandmail.com/arts/article-bc-film-union-contracts-ai/ (https://www.theglobeandmail.com/arts/article-bc-film-union-contracts-ai/)** .

Questions to consider:

1. What is the role for human creativity and artistic expression after the introduction of generative AI models with exponentially expanding capabilities? How should the creative industries treat their creative human capital in the face of cheaper automated alternatives?
2. How can the spread of deepfakes impact public trust in media and the authenticity of historical records? What regulatory and policy measures can be taken to address the potential harms of deepfake technology while respecting freedom of expression and creativity?
3. How should copyright and intellectual property laws evolve to address ownership and attribution in situations where AI is involved in the creative process? Consider the challenges of determining authorship, the role of AI as a tool versus a creator, and the potential impact on artists' livelihoods.

Note: Assignment #2 is due with presentations in class 7.

No Class - Reading Week (October 26)

Class 7 - INTERVENTIONS TO IMPROVE RETURNS TO CREATORS (Zoom)

OVERVIEW: Class 7

Interventions to Improve Returns to Creators

Date: Wednesday November 1, 2023

Guests:

Cory Doctorow, Co-Author of *Chokepoint Capitalism*; journalist; blogger

Owen Ripley, Associate Assistant Deputy Minister of Cultural Affairs at Canadian Heritage

Doug Barrett, Schulich Professor and media production and broadcasting lawyer

Overview:

While this course is directed toward cultural policy that derives its purpose and mechanisms from Canadian jurisdictions – local, provincial, and federal – they take place in the larger global picture of the creation and distribution of culture. It is important to understand the dynamics of the cultural industries globally, and to realize that Canadian policy makers have limitations on how much they can change the environment for Canadian creators. *Chokepoint Capitalism* goes through chapter and verse how the tech companies and others have been enormously successful in their respective businesses, which has involved squeezing the financial flows that goes back to the creators.

While speaking from an American perspective for the most part, they offer great insights into the ways that could be deployed to "win back" some of the ground captured by "big tech and big content." While Canadian policies will not directly change the ground, Canada has historically fought for the right to

structure the market conditions in Canada as a counterbalance against American cultural imperialism in particular. What's the play in the future as we see the pressure put on Canadian policy by Facebook, Google, and the streamers?

Readings

Selections from *Chokepoint Capitalism* part 2 "Braking Anticompetitive Flywheels" pp.142-245
Grant, Peter S., and Chris Wood. *Blockbusters and Trade Wars: Popular Culture in a Globalized World*. Vancouver: Douglas & McIntyre, 2004. [Available in YorkU Libraries]
Khan, Lina. *Remarks of Chair Lina M. Khan As Prepared for Delivery Economic Club of New York*. 24 July 2023. **https://www.ftc.gov/system/files/ftc_gov/pdf/remarks-khan-economic-club-new-york.pdf (https://www.ftc.gov/system/files/ftc_gov/pdf/remarks-khan-economic-club-new-york.pdf)** .

Questions to consider:

1. What are the most challenging threats to Canadian policy and cultural interests are we to face over the next 3-5 years?
2. Is there a possible alliance with cultural workers in other countries, and/or with other countries in terms of their competition and cultural sovereignty policies?
3. Will the CRTC take the place of the Competition Bureau Canada, or work with the Bureau to reduce anti-competitive behaviour.

Class 8 - ACCESSIBILITY IN FILM & TV (Zoom)

OVERVIEW: Class 8

Accessibility in Film & Television

Date: Wednesday November 8, 2023

Guests:

Sasha Boersma, Co-founder & Producer, Sticky Brain Studios and Board of Directors, Disability Screen Office

Nikitha Gopal, Consultant at Nordicity

Overview:

In partnership, Accessible Media Inc., the Canadian Media Fund, and Telefilm Canada are launching a Disability Screen Office (DSO) in Canada to eliminate accessibility barriers as well as support and amplify disabled creatives. The DSO will provide services that focus on increasing accurate and meaningful disability representation both on and off screen. Another aim of the DSO is to expose and to eliminate accessibility barriers, creating a more inclusive and accessible industry for everyone.

Readings (required)

https://www.respectability.org/2022/05/disability-screen-office-canada/ (https://www.respectability.org/2022/05/disability-screen-office-canada/)

DSO CRTC Intervention (posted on Canvas)

Note: Assignment #3 is due in this class, and you will be introduced to the outline for your Research Project.

Class 9 - THE MUSIC INDUSTR(IES) (ZOOM)

OVERVIEW: Class 9

Cultural Policy and the Music Industr(ies)

Date: Wednesday November 15, 2023

Guests:

Erin Benjamin, CEO at Canadian Live Music Association (CLMA)

Marina Adam, Director, Ontario Music Office, Ontario Creates

Brian Christensen, Analyst, Nordicity

Overview

In this class, we will focus on the policy issues affecting the production, promotion of Canadian music and Canadian musicians and music creators. Tangentially, we will touch on copyright and business model issues affecting the livelihood of music creators.

The music sector has been rocked by a series of technological advances that have substantially affected the economic system that underpins the sector. Napster ushered in the digital age in distribution, enabling access to music that had been previously available on some physical medium (vinyl, cassette, CD). It has been followed by the iTunes downloading model, then the Spotify et al streaming service model – and the ever-present YouTube service which has become the main way for new musicians to introduce their creative works to the public. However, the "buy-outs" of the TV streaming services, the playlist factor in music streaming and the huge market dominance of YouTube have generated distribution challenges for creators who are not at the very top, and independent labels who are dwarfed by the majors.

From the initial Cancon rules on Canadian commercial radio stations by the CRTC, Canadian governments have provided a range of support mechanisms to help create, produce, and promote Canadian content. The Canadian Music Fund helps develop the independent labels and publishers to promote, market, and to some extent finance the creation and distribution of music. Ontario Creates operates the Ontario Music Office via various support programs for the music sector. In each province there is an active music development industry association, and national ones for French and English language music industry. How does policy support keep up with the changes in the music sector – technology platforms, business models and the rest?

Does the *Online Streaming Act* provide hope for Canadian music promotion? It is relevant to music in that it is aimed at bringing streaming services under the aegis of the CRTC. The federal government recognized that streaming services should make some level of contribution to a music fund and introduce measures to facilitate the discoverability of Canadian music.

Readings (required)

Giblin, Rebecca, and Cory Doctorow. *Chokepoint Capitalism: How Big Tech and Big Content Captured Creative Labor Markets and How We'll Win Them Back*. Beacon Press, 2022. CH. 4 pp. 52-65

Woolf, Marie. "Major Music Labels Ask for Light Touch on Bill C-11 to Continue Content Curation." *The Globe and Mail*, 17 July 2023. ***www.theglobeandmail.com*** **(http://www.theglobeandmail.com)** , **https://www.theglobeandmail.com/politics/article-big-music-labels-ask-for-light-touch-on-bill-c-11-content-curation/ (https://www.theglobeandmail.com/politics/article-big-music-labels-ask-for-light-touch-on-bill-c-11-content-curation/)** .

Creative Export Canada Renewal: **https://www.canada.ca/en/canadian-heritage/services/funding/creative-export-canada.html (https://www.canada.ca/en/canadian-heritage/services/funding/creative-export-canada.html)**

CLMA Annual Report 2023
(https://static1.squarespace.com/static/60a7b661c8fc307f1c677333/t/6512f7ef5cd82e6ed70474d8/1695741952548/ANNUAL+REPO 23-compressed.pdf)
Reflections on Labour Challenges in the Live Music Industry
(https://static1.squarespace.com/static/60a7b661c8fc307f1c677333/t/653a855af542a95bea3f9f04/1698334061490/CLMA+Labour+ +Recommendations+Report.pdf)

Readings (recommended):

Giblin, Rebecca, and Cory Doctorow. *Chokepoint Capitalism:* CH *5 Why Streaming Doesn't Pay* pp. 66-77 and CH 8 *How Live Nation Chickenized Live Music* pp 96-103
Canadian Independent Music Association: **https://cimamusic.ca/news/recent-news/read,article/18075/cima-congratulates-the-government-of-canada-on-the-passage-of-bill-c-11 (https://cimamusic.ca/news/recent-news/read,article/18075/cima-congratulates-the-government-of-canada-on-the-passage-of-bill-c-11)**
Music Publishers Canada: **https://www.musicpublishing.ca/news/future-of-work-report (https://www.musicpublishing.ca/news/future-of-work-report)**

Questions to consider:

1. What are the most important policy measures used in the support of the music industry in Canada?
2. On what basis should a label be given financing for developing its business? How should the emerging artist entrepreneurs – "self-producers" - be supported?
3. Should governments focus on the artist itself or attempt to make sure the private sector labels, managers, publishers are given the tools to grow the sector?
4. Should the *Online Streaming Act* become just the start to rebalance the revenues flowing to the creators in the music sector. Should Canada work more in concert with foreign countries to break the chokepoints in live music shows, streaming, length of copyright, and music publishing?

Note: The Final Paper Outline is due in this class.

Class 10 - CEO CHALLENGES (IRL)

OVERVIEW: Class 10

CEO challenges – change management in policy development and implementation

Date: Wednesday November 22, 2023

Guests:

Karen Thorne-Stone, President & CEO at Ontario Creates

Overview:

This class will focus on the Ontario granting institutions and the job of the CEO to forecast pressures for policy change to their normal operational processes, strategies, and indeed objectives – and how to manage the changes needed to successfully transition to the new policy environment. Whether by change of government, change in the expectations of the beneficiaries of public support, or due to technology – what kind of transition processes work the best for the organization? Are there opportunities of flexibility in the response, be that in timeframe, eligibility stipulations, or even some changes in direction?

Although managing different organizations, the guests will reflect on the major changes that they have faced in terms of policy change, whether that be in reaction to COVID, public light placed on truth and reconciliation and/or to increase the diversity quotient of cultural participation, or the technology and business models in the operation of cultural activities. They will describe one or two instances of policy

changes thrust on them, and how they addressed the ensuing challenges and readied their organization to manage the transition.

Readings (*required unless otherwise indicated*):

Ontario Creates 2021-22 Annual Report: **https://www.ontariocreates.ca/uploads/about-us/eng/annual-report/oc_annualeportr22english-final.pdf (https://www.ontariocreates.ca/uploads/about-us/eng/annual-report/oc_annualeportr22english-final.pdf)**

Ontario Creates 2023-27 Strategic Plan: **https://www.ontariocreates.ca/uploads/Bar/Strategic-Plan/Ontario-Creates-Strategic-Plan-2023-2027-EN.pdf (https://www.ontariocreates.ca/uploads/Bar/Strategic-Plan/Ontario-Creates-Strategic-Plan-2023-2027-EN.pdf)**

Questions to consider:

1. Think of a policy change, e.g., increase or decrease of spending, requirement to institute greater transparency and accountability through the creation of KPIs and annual performance review, requirement to access funds through collaboration – and consider how you would implement it in a cultural organization.
2. Identify the constraints you need to live with in responding to policy changes caused by technology, government change, or new directions proposed by the government through mandate letters.
3. What tools are at the disposal of the CEO in changing the processes flowing from changes in cultural policy?

Class 11 - PERFORMING ARTS (IRL)

OVERVIEW: Class 11

Cultural Policy in the Performing Arts: Theatre in Focus

Date: Wednesday November 29, 2023

Guests:

Karen Tisch, Executive Director at Why Not Theatre; Equity Consultant

Overview:

In this class, we pick a specific cultural discipline – live theatre. We are joined by three leaders from Canada's non-profit theatre scene, which faces unique challenges and mandates in contrast with commercial theatre such as Broadway, West End, and in Toronto, mainly Mirvish Productions.

We will discuss the delicate balance between financial sustainability and artistic innovation and examine the strategies employed by these organizations to create transformative theatrical experiences. In doing so, topics such as public and private funding structures, programming challenges, and audience acquisition and retention will be covered.

Readings (required):

Why Not Theatre 2020 Annual Report: **https://whynot.theatre/wp-content/uploads/2022/01/2020-Annual-Report.pdf (https://whynot.theatre/wp-content/uploads/2022/01/2020-Annual-Report.pdf)**

Business / Arts Arts Response Tracking Survey May 2023: **http://www.businessandarts.org/wp-content/uploads/2023/05/2023_ARTS_MAY.pdf (http://www.businessandarts.org/wp-content/uploads/2023/05/2023_ARTS_MAY.pdf)**

Canada Council 2021-26 Strategic Plan [Link to pdf in Canvas]

Readings (Recommended):

While the articles below are from American sources, they do summarize many of the contemporary issues faced by non-profit theatres:

Pierson, Alexandra, et al. "Theatre in Crisis: What We're Losing, and What Comes Next." *AMERICAN THEATRE*, 24 July 2023, **https://www.americantheatre.org/2023/07/24/theatre-in-crisis-what-were-losing-and-what-comes-next/ (https://www.americantheatre.org/2023/07/24/theatre-in-crisis-what-were-losing-and-what-comes-next/)** .

Bahr, Sarah. "72 Regional Theaters, One Shared Crisis." *The New York Times*, 28 July 2023. *NYTimes.com*, **https://www.nytimes.com/2023/07/28/insider/regional-theater-crisis.html (https://www.nytimes.com/2023/07/28/insider/regional-theater-crisis.html)** .

Questions to consider:

1. Non-profit theatre organizations often prioritize artistic innovation and social impact over profit generation. How can cultural policy frameworks be designed to support these organizations in maintaining a delicate equilibrium between artistic experimentation and financial sustainability?
2. The funding agencies for the arts are making up for lost ground in terms of rewarding performing arts organizations who are bringing forward works that are more accessible to a more diverse audience. Are they going about it in the right way?
3. Funding agencies are also expecting arts organizations to become more diverse in the creative and management functions. Should organizations which do not conform take a hit in the operating grants?
4. How do agencies both reward innovation and new creative works and at the same time keep funding established institutions who are performing well?

Class 12 - FINAL PRESENTATIONS (ZOOM)

OVERVIEW: Class 12 - FINAL PRESENTATIONS

FINAL PRESENTATIONS

Date: Wednesday December 6, 2023

Guest: no guests

Student presentations, review, and wrap up.

You will have 5 minutes to present on the status of your individual final project followed by a brief Q&A from the class.

Please note your Final Research Project is due December 13, 2023.

STUDENT 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.
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Academic Honesty

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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.*

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

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

Schulich School of Business
York University

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:
   MBA Program

2. Responsible Unit:
   ARTM

3. Subject Code (Rubric) and Course Number:
   ARTM 6301

4. Credit Value:
   3.00

5. Long Course Title: Issues in Arts and Cultural Management

6. Short Course Title: Issues in Arts and Cultural 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 2024

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9. Rationale:

The primary rationale for the modification to this course is to support the change in the Arts, Media, and Entertainment Specialization where we intend to reduce the number of required course credits from 2 to 1. This course will be the only required course for the specialization. The content of this course will largely remain intact, but it will now absorb a few of the essential topics and themes covered in the second former required course, Cultural Policy. Additionally, the course content is being revised and updated to capture the increasingly relevant themes of creative sector disruption/transformation and creativity as a business practice.

10. Proposed Course Information:

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Existing Course Information (Change From):	Proposed Course Information (Change To):
Title ~~Issues in Arts and Cultural Management~~ ~~Explores the dynamics of different perspectives on the human and economic resources involved in the production, distribution and support of the arts and cultural products in Canada. The central question of this course concerns the management issues that arise from these dynamics. This is a prerequisite course for the MBA Program in Arts and Media Administration. It is intended to service those students who have a real interest in managing in the arts and cultural sector. However, for those students who wish to discover the sector and to test their interest, this is also a useful course.~~ Learning outcomes: This course is an introduction to the management structure of ~~the Canadian~~ arts, media, and entertainment sector. It will distinguish the typical values of the sector (e.g. quality and innovation) to understand how paradoxes and constraints shape organizational objectives. It will provide an overview of cultural perspectives, types of organizations, regulatory structures, nuancing and monetization methods, human resources, international activity, technology, and other elements of the sector. A number of explanations for these organizations' behaviour will illuminate and be illuminated by other learnings in the Schulich MBA program. Various issues and areas of practice within management of cultural organizations and information on the management	Title Transformation in Media and Culture This course will explore the interplay between business, management, politics, and technology within the evolving creative industries globally. It will analyze the influence of emerging ideas, audiences, technologies, and regulations on the creation, funding, distribution, consumption, control, and suppression of media, entertainment, and cultural products, while also assessing their effects on traditional cultural forms. Learning outcomes: This course is an introduction to the management structure of global arts, media, and entertainment sector. It will distinguish the typical values of the sector (e.g. quality and innovation) to understand how paradoxes and constraints shape organizational objectives. It will provide an overview of cultural perspectives, types of organizations, regulatory structures, nuancing and monetization methods, human resources, international activity, technology, and other elements of the sector. A number of explanations for these organizations' behaviour will illuminate and be illuminated by other learnings in the Schulich MBA program. Various issues and areas of practice within management of cultural organizations and information on the management resources in this sector in Canada and other countries will be examined, and illuminated through research, contemporary press

resources in this sector in Canada and other countries will be examined, and illuminated through research, contemporary press readings and presentations on active cultural organizations by current sector leaders. Classes will also consider the effects of COVID-19, ~~BIPOC~~ initiatives, ~~new technology~~ and the growth of media monoliths. This is a compulsory course	readings and presentations on active cultural organizations by current sector leaders. Classes will also consider the effects of COVID-19, EDI initiatives, recent technology, disruption/transformation, creativity as a business practice, and the growth of media monoliths. This is a compulsory course. Upon course completion students should: be familiar with key models of cultural policy formation and delivery; be able to analyze approaches to cultural policy in relation to broader social and political frameworks at local, regional, national, and international levels; and be able to understand, critically discuss, and debate major theoretical approaches to cultural policy and its impact on cultural industries.

11. Enrolment Notes: N/A

12. Consultation:

This course change is a result of the changes to the ARTM specialization, which involved extensive consultation with the MBA Program Director and Associate Dean, Academic.

Originator:

X
Trina McQueen
AME Professor & Co-Director

Signature — March 13, 2024 — Date

Trina McQueen — Name

AME – Professor/Co-Director — Area or Specialization

Approvals:

Area or Specialization

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

Signature — March 21, 2024 — Date

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Kenneth Rogers	AME – Academic Director
Name	Area or Specialization

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

Mike Valente	March 21, 2024
Signature	Date

Mike Valente	MBA
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date

Kevin Tasa	MPC
Name of Committee Chair	Committee

last updated: Mar 15 6:03pm EDT.

Schulich School of Business

ARTM6301 W2024 CREDITS: 3.00

ARTM 6301 R - ISSUES IN ARTS & CULTURAL MANAGEMENT

MON 18:30-21:30 NMC TR. RM

INSTRUCTOR

Trina McQueen

mcqueent@schulich.yorku.ca

416.736.2100 Ext. 30313

N320 SSB

ADMIN

Redzep Ferati

ferare@schulich.yorku.ca

416.736.2100 Ext.55068

N319 SSB

Guest lecturers in this course are senior leaders in their organizations. We appreciate the time they give us so generously. We understand that their commitments may mean changes to this schedule.

This section is scheduled to meet at Schulich campus located at: Miles S. Nadal Management Centre, Suite 500, TD Centre 222 Bay Street, Toronto, Ontario M5K 1K2

BRIEF DESCRIPTION

Explores the dynamics of different perspectives on the human and economic resources involved in the production, distribution and support of the arts and cultural products in Canada. The central question of this course concerns the management issues that arise from these dynamics. This is a prerequisite course for the MBA Program in Arts and Media Administration. It is intended to service those students who have a real interest in managing in the arts and cultural sector. However, for those students who wish to discover the sector and to test their interest, this is also a useful course.

COURSE LEARNING OUTCOMES

This course is an introduction to the management structure of the Canadian arts, media and entertainment sector. It will distinguish the typical values of the sector (e.g quality and innovation) to understand how paradoxes and constraints shape organizational objectives. It will provide an overview of cultural perspectives, types of organizations, regulatory structures, financing and monetization methods, human resources, international activity, technology and other elements of of the sector. A number of explanations for these organizations' behaviour will illuminate and be illuminated by other learnings in the Schulich MBA program. Various issues and areas of practice within management of cultural organizations and information on the management resources in this sector in Canada and other countries will be examined, and illuminated through research, contemporary press readings and presentations on active cultural organizations by current sector leaders. Classes will also consider the effects of COVID-19, BIPOC initiatives, new technology and the growth of media monoliths. This is a compusory course

COURSE MATERIAL

There is no textbook for this course. Elements of the book below will be useful for the major assignment.

Alexander Ostwalder & Yves Pigneur, Business Model Generation: a handbook for visionaries, game changers and challengers, Wiley, 2010 (also as an e-book). All reading material for the course is linked to in Canvas. Additional readings, as well as articles, class notes, etc. will be available in Canvas.

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Class Participation 20%			
Class Participation	☐	20%	Mon Apr 1, 2024 at 09:30pm EDT
5x5 Presentations 15%			
5x5 Presentations	☐	15%	Mon Jan 22, 2024 at 07:00pm EST
Mid-term Assignment 25%			
Leadership	☐	25%	Thu Feb 22, 2024 at 11:59pm EST
Course Theme Assignment 40%			
Create a Cultural Organization	☐	40%	Mon Apr 1, 2024 at 11:59pm EDT

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Class Participation

☐ Due Date: Mon Apr 1, 2024 at 09:30pm EDT

Class participation

Participation will be assessed in each class on four criteria: presence, punctuality, preparation and participation. For preparation, each student should have read at least the material assigned, and where possible, other relevant material. Everyone should be prepared to ask and answer questions, contribute their thoughts, ideas and experiences, and to engage directly, and respectfully, with each other, with class guests and with the instructors.

Weight: 15%

5x5 Presentations

☐ Due Date: Mon Jan 22, 2024 at 07:00pm EST

Description

THE FIVE BY FIVE REPORT. MARK 15%

Each student will give a 5x5 presentation–five minutes, five slides–on a cultural organization from the arts and cultural sector, anywhere in the world. The organization can be a producing, exhibiting, performing, or promotional group, and either for profit or not for profit.

The organizations must be pre-cleared by Professor McQueen, by email (tmcqueen@schulich.yorku.ca), no later than Saturday January 14. Reports will be oresented in the January 15 class. They are to be emailed to Professor McQueen by Sunday midnight on January 22.

The presentation should address the following categories and issues:

*Introduce the organization: What do they do? When did they start? Who do they serve?

*Financing: budget..sources of revenue

*Mission, mandate, vision. Do they deliver?

*Identify current challenges and how they are being met.

*Successful? If yes, how. Not successful? If so, why.? Likely future

The presentation must not exceed 5 minutes. You may be cut off if it does.

Visuals are welcome within the 5 pages.

A bibliography must be attached to the submission, but not shown in class.

Value: 15%

Leadership

Due Date: Thu Feb 22, 2024 at 11:59pm EST

ARTM 6301. MID-TERM ASSIGNMENT 'LEADERSHIP'

APPROVAL DATE: No topic approval required.

This assignment is a 12 page essay properly footnoted and with a bibliography attached. Graphs and other data visualizations are welcome if they provide significant information, and are a minor part of the paper.

The essay will describe a notable leader of a cultural organization and their organization, anywhere in the world. It will describe the organization and achievements of the leader's tenure at the organization; and analyze the personal and professional factors that led to that success. These might include early influences such as family and education; the job

experiences before the leadership; a failure that pointed the way, leadership practices, sector connections, particular talents, personal ideals and values, diligence, good timing, good luck, and any other factors. There are many books which contain theories about leadership success and you may certainly use one of those theories if you wish, and if they have substantial recognition as useful.

I will provide some examples of leaders and companies. If there are duplicate choices from the list, the earliest time of date on the submission will take the choice. Choices not on the list will be very welcome.

These papers will form the basis for our discussion class on Leadership, to be held February 26.

Create a Cultural Organization

Due Date: Mon Apr 1, 2024 at 11:59pm EDT

ARTM 6301: COURSE THEME ASSIGNMENT 40%

CREATE A CULTURAL ORGANIZATION.

Approval date: February 18.

Presentation date: April 4.

Paper date: April 11.

Description: This is a group exercise. I will announce the groups in the third or fourth class. Each group will develop a creative and business plan for a new Canadian cultural organization. The plans must consider the “building blocks” set out in “Business Model Generation” (Osterwalder &Pigneur) and they must reflect issues and themes of the course. The organization can be anything the group wants: for profit or not-for-profit, an institution or a regular event, intellectual or just fun, large or small. The proposed cultural organization must be approved by the professor.

Requirements: There will be two elements in the assignment. One is a 15-minute presentation by the group. It should take the form of a pitch and can include slides, videos, data visualizations and other elements. The second is a 10 page academic essay which will describe the organization in terms of the ‘building blocks’ and will include a research bibliography.

Group meetings: Groups will decide when and how many times to meet. However, to ensure that all members of the group have some common times to meet, 4 classes will end half an hour before the designated time.

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

Week 1 - What is the future of Arts, Culture, and Entertainment?

Jan 8/24

Overview: What is the future of Arts, Culture, and Entertainment?

Guest Lecturer: Dr. Sarah Bay-Cheng, Dean, School of Arts, Media, Performance, and Design, York University

Topic - The Future of Creativity

Dr. Sarah Bay-Cheng is the Dean of the School of the Arts, Media, Performance & Design and Professor of Theatre & Performance Studies. Her research focuses on the intersections among theatre, performance, and media including histories of avant-garde theatre and film, social media, and digital technologies in performance. Her publications include the books *Performance and Media: Taxonomies for a Changing Field* (2015), *Mapping Intermediality in Performance* (2010), *Poets at Play: An Anthology of Modernist Drama* (2010) and *Mama Dada: Gertrude Stein's Avant-Garde Drama* (2004) as well as more than 100 articles, essays, and invited lectures. Her current book project considers digital historiography and performance. Prior to coming to York, she was a Fulbright Visiting Senior Scholar in Media and Cultural Studies at Utrecht University in the Netherlands (2015) and the founding director of the Technē Institute for the Arts and Emerging Technologies at the University at Buffalo (2012-2015). Since 2016, she can be heard as a co-host for On TAP: A Theatre and Performance Studies podcast (http://www.ontappod.com/) . Bay-Cheng has also worked as a director and dramaturg with particular interest in intermedial collaborations and a fondness for puppetry.

More information: https://sarahbaycheng.net (https://sarahbaycheng.net/) .

Introduction and Overview

- Class members introductions
- Introduction to and remarks by Program Coordinator - Nikolaos Markakis
- Review of course objectives and assignments
- Expectations and marking
- Review of Guest Lecturers

Week 2 - Financing and Entrepreneurship

Jan 15/24

Overview: 5x5 Presentations

Students will present 5x5 Presentations (students will present their 5x5 reports and answer questions).

Week 3 - Funding and Policy: The Fuel of Canadian Arts

Jan 22/24

Overview: Funding and Policy: The Fuel of Canadian Arts

The recommendations of the Massey Report of 1951 on policy and funding set the structure for arts in Canada through a system of funded institutions and government grants. Both policy and funding are under continual negotiation and discussion.

Guest Lecturer: Pat Bradley (MBA Schulich/ARTM) Arts Professor and Theatre executive.

Week 4 -Human Resources Management in Arts and Cultural Industries

Jan 29/24

Overview: Human Resources Management in Arts and Cultural Industries

Almost every artist and arts worker must be a union or association member. This structure can set decisions about how art is created. (Example: SAG-AFTRA re AI) Other current practices in HR will be examined.

Guest lecturer: Pat Bradley

Week 5 - BUSINESS AND THE ARTS: WHAT DOES THE RESEARCH SAY?

Feb 5/24

Overview: BUSINESS AND THE ARTS: WHAT DOES THE RESEARCH SAY?

Business/Arts (B/A) is a national not for profit organization in support of arts. The group conducts deep research across the country to understand the motivations and barriers that audiences have for the arts. The CEO, Aubrey Reeves, will present and discuss an inside look at the research, and how arts organizations are contributing to and using the results.

Lecturer: Aubrey Reeves

Week 6 - Entrepreneurship in the Arts

Feb 12/24

Overview: Entrepreneurship in the Arts

Despite the success of monolithic arts and media companies, many smaller arts and media businesses are flourishing. This class will focus on how companies are set up, how they attract investment, manage their business, and divest if they wish to. It will also look at the mistakes that can derail success.

Lecturer: TBA

Week 7 – Unpacking the Cultural Policy Toolkit: Canadian Federal Cultural Policy Historical Perspective

Feb 26/24

Overview: Following our introduction to Canadian cultural policy and the cultural policy toolkit, this class examines Canada's historic development of cultural policy, with a focus on federal cultural institutions.

The class will examine the evolution of cultural policy in Canada, its context, its objectives and the way in which policy evolves. The class will start with a timeline of the policies in Canada that led to the creation of the Massey Levesque Royal Commission (1951) and will compare that report with the 1982 Federal Cultural Policy Review Commission's Report (Applebaum-Hébert). We will also consider, brie y, several later documents including the 1999 Sense of Place report and the government's response to it: Connecting to the Canadian Experience: Diversity, Creativity and Choice; as well as the Creative Canada Policy Framework: The Path Forward (2017). The class will compare the Canadian model vs. particularly those of Europe, the Commonwealth countries and the U.S. We will also consider the development of the Universal Declaration on Cultural Diversity and more recent policies that have shaped Canadian cultural policy in its development and evolution. After Prof Zemans' presentation, we will engage in a fulsome discussion. Please come prepared to engage having done the readings and handed in your 1st written assignment and be ready to consider, in particular, the specific context with respect to geography, provincial vs. federal jurisdiction, diversity and representation, etc. that determined the shape and content of the key moments in policy history: 1951; 1982 and 2001.

Guest: Joyce Zemans (Senior Scholar & University Professor Emerita MBA Program in Arts, Media and Entertainment)

Week 8 - The Leaders

Mar 4/24

Overview: The Leaders

This class will be based on the leadership assignment and the personal experiences of class members. The class will discuss and debate the most important, most useful and the most poisonous characteristics of leaders in arts and culture organizations.

Week 9 - Interventions to Improve to Creators

Mar 11/24

Overview: While this course is directed toward cultural policy that derives it's purpose and mechanism from Canadian jurisdiction- local, provincial, and federal-they take place in the larger global picture of the creation and distribution of culture.

It is important to understand the dynamics of the cultural industries globally, and to realize that Canadian policy makers have limitations on how much they can change the environment for Canadian creators. Chokepoint Capitalism goes through chapter and verse how the tech companies and others have been enormously successful in their respective businesses, which has involved squeezing the financial owes that goes back to the creators. While speaking from an American perspective for the most part, they offer great insights into the ways that could be deployed to "win back" some of the ground captured by "big tech and big content."

What's the play in the future as we see the pressure put on Canadian policy by Facebook, Google, and the streamers? Readings Selections from Chokepoint Capitalism part 2 "Braking Anticompetitive Flywheels" pp.142-245 Grant, Peter S., and Chris Wood. Blockbusters and Trade Wars : Popular Culture in a Globalized World. Vancouver: Douglas & McIntyre, 2004. [Available in YorkU Libraries] Khan, Lina. Remarks of Chair Lina M. Khan As Prepared for Delivery Economic Club of New York. 24 July 2023. https://www.ftc.gov/system/ les/ftc_gov/pdf/remarks-khan-economic-club-new-york.pdf (https://www.ftc.gov/system/ les/ftc_gov/pdf/remarks-khan-economic-club-new-york.pdf).

Guest Lecturer: Cory Doctorow, Co-Author of Chokepoint Capitalism; journalist; blogger Owen Ripley, Associate Assistant Deputy Minister of Cultural Affairs at Canadian Heritage Doug Barrett, Schulich Professor and media production and broadcasting lawyer

Week 10 - Mark Bishop: A Creative Life

Mar 18/24

Overview: Mark Bishop: A Creative Life

Mark has recently been appointed as co-president of Blue Ant Media, a large Canadian production and distribution company, which also owns FAST channels in Canada and the United States, and other media around the world. He and his co-president, Matt Hornburg have been recognized in the “Top Next Gen Producers” by the Hollywood Reporter. Before joining Blue Ant, Mark and his partner created “marble media” an award winning company that developed, produced and distributed tv and interactive digital content. His company’s documentary “Mr Dressup: The Magic of Make Believe” won the TIFF People’s Choice award. He will discuss the founding and growth of marble media; and the objectives of his new role.

Guest Lecturer: Mark Bishop

Week 11 - LINDA SCHULYER: A Creative Life

Mar 25/24

Overview: LINDA SCHULYER: A Creative Life

She is the co-creator and producer of one of the best known and best loved Canadian drama series, ‘De Grassi’ There are five series produced over 4 decades and each has been seen in countries around the world. The stories are about teenagers from a lower middle-income area (De Grassi Street). It is multi-cultural, and a number of its episodes were based on serious difficulties for teenagers and their families. Her partner in life and business is lawyer Stephen Stohn. Both have been named to the Order of Canada for their contributions to Canadian artistic live.

Guest: Linda Schuyler

Week 12: PRESENTATIONS: NEW CANADIAN CULTURAL ORGANIZATIONS

Apr 1/24

Overview: PRESENTATIONS: NEW CANADIAN CULTURAL ORGANIZATIONS

Class groups will each present their plans for a new cultural organization. Visual and other presentation ideas are expected, and each group will respond to questions from the rest of the group.

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

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* 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.*

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

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

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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:
   MBA Program

2. Responsible Unit:
   ARTM

3. Subject Code (Rubric) and Course Number:
   ARTM 6340

4. Credit Value:
   3.00

5. Long Course Title: Managing the Broadcast & Digital Worlds: Strategy and Change in Television and Digital Media

6. Short Course Title:
   Managing the Broadcast & Digital Worlds

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)
	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)

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

9. Rationale:
The title and course description of this course needs to be updated to reflect changes in the field that are more contemporary. Over the top (OTT)and “streaming” content providers like Netflix, Amazon Prime and Disney+ have become a dominant topic, issue, and practice in the field that is widely known as television broadcasting, as it was referred to when the course was initially developed. It is therefore important to incorporate this growing phenomenon in the Arts, Media, and Entertainment specialization.

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):
Title ~~Managing the Broadcast & Digital Worlds: Strategy and Change in Television and Online Media~~ ~~This course identifies and examines central issues in the management of public and private television enterprises in Canada, and online programming undertakings. Students will analyse the current environment and the scenarios for the future of Canadian broadcasting; they will also investigate how broadcasters, programmers and producers are managing content and revenue on both traditional and digital platforms and in new partnerships.~~ ~~—~~ ~~Prerequisite:~~ ~~Some related professional experience, plus permission of the instructor~~ Cross-listed with GS/CMCT 6340 3.00	Title Media Models from Network to Netflix This course examines innovative business models adapting to digital disruption and reshaping the global media landscape. Topics include content financing, branding, revenue strategies, and evolving consumer demands for interactive content. Drawing on Canadian and global markets, it analyzes streaming's challenge to traditional media, alongside regulatory and technological impacts, notably Artificial Intelligence. Students gain insights from industry experts. Cross-listed with GS/CMCT 6340 3.00

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11. Enrolment Notes: N/A

12. Consultation:
This course change is a result of the changes to the ARTM specialization, which involved extensive consultation with the MBA Program Director and Associate Dean, Academic.

Originator:

X
Lisa de Wilde
Bell Media Professor

Signature	March 13, 2024 Date
Lisa de Wilde Name	AME – Bell Media Professor Area or Specialization

Approvals:

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

Signature	March 21, 2024 Date
Kenneth Rogers Name	AME – Academic Director Area or Specialization

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

Mike Valente Signature	March 21, 2024 Date
Mike Valente Name of Program Director	MBA Program

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

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Kevin Tasa	*March 28, 2024*
Signature	Date
Kevin Tasa	MPC
Name of Committee Chair	Committee

last updated: Dec 04 5:12pm EST.

Schulich School of Business

ARTM6340 F2023 **CREDITS: 3.00**

ARTM 6340 U - MANAGING THE BROADCAST & DIGITAL WORLDS

TUE 19:00-22:00 SSB S128

Office Hours

Please send me an email and i will be happy to arrange a video call or an in person meeting.

INSTRUCTOR

Lisa De Wilde

ldewilde@schulich.yorku.ca

416.736.2100 Ext. 30313

N320 SSB

ADMIN

Nikolaos Markakis

mark896@schulich.yorku.ca

416-736-5217

N319 SSB

A number of Industry Guests will join our classes. Except for Module #7 where Trina McQueen will lead the class, Professor de Wilde will lead the class. Please note that the order and contents of the classes described below could change when appropriate given that this is a fast-changing sector.

This course is "taught with" GS/CMCT 6340 3.0 U

LISA DE WILDE BIOGRAPHY

Lisa de Wilde is the Bell Media Professor in Media Management in the Schulich School of Business MBA Program in Arts, Media and Entertainment Management.

Lisa is a visionary and transformational leader. Over 14 years as CEO of TVO (2005 -- 2019) she transformed the educational broadcaster from an analog operation to an innovative, fully digital leader. While also building up a current affairs powerhouse at TVO, Lisa's sharp focus on education technology created groundbreaking new tools and programs to position TVO as an award-winning global leader in EdTech.

Since 2002, she has served on numerous boards in the private and not-for-profit sectors, and currently serves as a Board member of TELUS where she chairs the Governance Committee, the Asia Pacific Foundation of Canada where she is Vice-Chair, École de danse contemporaine de Montréal and CARE Canada. She is also a former board member and Chair of the Board of Toronto International Film Festival (TIFF).

She is a lawyer by training who began her career at the CRTC, was a partner at a major law firm and served as President and CEO of Astral Television Networks.

Lisa is a recipient of the Queen's Diamond Jubilee Medal, has received honourary degrees from Toronto Metropolitan University and Brandon University, holds a Bachelor of Arts and of Laws degrees from McGill University and is a member of the Order of Canada. Her personal interests include film, travel, dance and the new generation of talent.

BRIEF DESCRIPTION

This course identifies and examines central issues in the management of public and private television enterprises in Canada, and online programming undertakings. Students will analyse the current environment and the scenarios for the future of Canadian broadcasting; they will also investigate how broadcasters, programmers and producers are managing content and revenue on both traditional and digital platforms and in new partnerships.

COURSE LEARNING OUTCOMES

Traditional business models for media are currently in upheaval from the advent of online media and new delivery technologies. In this context, traditional legacy media organizations, and their online usurpers, must operate in a dramatically changing creative and business environment.

The course identifies and examines the central issues in managing private and public television enterprises, program suppliers and stakeholder organizations, including strategies for the online world and the strategies of the new streaming services. Students will be exposed to the threats and risks in the current environment, and consider strategic options for the future of the Canadian system and its key players. The following themes will also be developed throughout the 12 modules:

- Corporate purpose/values/sustainability/ESG
- Leadership
- The importance of leveraging technology
- Global scope and scale
- The unique characteristics of content as a product
- Technology as enabler and disruptor

The course will include numerous industry guests. Each student will be matched with a senior industry executive (Adopt an Executive). This major component of the course involves researching, meeting, interviewing and writing about the executive and presenting the findings to the class. Many of these executives have been involved in the course for several years and are highly committed to its success. Another significant component of the course is a major project – AKA The Play Book (comprised of two elements, a class presentation that can leverage media elements and a written element that can be presented as a comprehensive and substantial deck). Active participation is also a requirement.

Course Objectives

1. Students will be introduced to the structure of the television industry: the private and public sectors, regulation, the strategic and competitive environment, and the impact of digital technology. They will understand the key challenges: fragmentation, concentration, vertical integration, multiple platforms, cross-media activity and revenue diversion. They will consider the role of program suppliers and other public and private sector stakeholders.
2. Students will be introduced to the business complexities of the various forms of media: conventional TV,, specialty and pay channels, the CBC/TVO and streaming. They will learn about the main sources of funding for media and content creators: advertising revenue; cable and online subscriptions, government subsidies and tax policies/credits.
3. Students will be introduced to processes for creating, financing, licensing and distributing Canadian programs, and the revenue models for media given the need to adapt business models to disruption driven by changes in technology.
4. Students will be introduced to the public policies governing television and content production, including the roles of the CRTC under the *Broadcasting Act*, the Department of Canadian Heritage and its agencies, including the Canada Media Fund and Telefilm.

5. Students will become fluent in how business models in legacy and online media are being challenged and adapting in the fast-changing world, developing verbal and written communication skills through active participation in class (with Industry Guests and reviewing “Media in the News” items and various assignments.
6. Students will become effective at working in a team to solve business problems.
7. Students will develop a relationship with an executive working in the media sector while developing an understanding of their role and their organization and where it fits in the media ecosystem.
8. Students will develop your personal introduction.

Assignment/Task	Quantity	% Weight	Total %	Author
Media Enterprise Snapshot	1	10%	10%	Individual
Adopt an Executive Program: 2 papers, 2 in-class presentations	2	30%	30%	Individual
Major Project(written deck and in-class presentations)	1	40%	40%	Team
Class participation	1	20%	20%	Individual
			100%	

COURSE MATERIAL

- There is no textbook. Readings will be assigned each week for the following class. In addition, Professor de Wilde will regularly provide links to general material relevant to the overall learning objectives of the course.
- Students are expected to stay aware of developments in the media sector both in Canada and globally by reviewing relevant digital publications.
- Here are some newsletters (the free version) that I recommend reading:
  - Lucas Shaw, Bloomberg, “Screentime” (weekly, Sunday evening)
  - Benedict Evans, Benedict’s Newsletter (weekly, Tuesday morning): He is brilliant on technology. You can be more selective because the range of topics is broader than media.
- Financial Times: there is a very attractive student rate. I recommend you subscribe and read regularly
- The Globe and Mail: Schulich students can obtain a much-discounted subscription rate.
- Cartt.ca, a source of industry news and context. The publisher of Cartt.ca has has agreed to provide a free subscription to you. please give me your email after the first class.

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Class Participation 30%			
Class Participation		30%	
Media Enterprise Snapshot 10%			
Media Enterprise Snapshot		10%	Wed Sep 27, 2023 at 06:00pm EDT
6340 Media snapshot topics		0%	
Adopt-an-Executive Experience 25%			
Adopt-an-Executive Experience		25%	Fri Nov 24, 2023 at 11:59pm EST
Consent Form		0%	
Adopt an Executive Interview Guide		0%	
Matches		0%	
Major Project - The Play Book 35%			
Major Project - The Play Book		35%	Tue Dec 12, 2023 at 11:59pm EST

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Class Participation

This is a small seminar class where everyone needs to show up every week and be “ready to play” which looks looks like this:

- read the pre-readings posted on Canvas
- stay on top of what is happening in the sector through your own reading
- participate in active discussions during class (based on your readings and experience) by answering questions, posing questions and contributing comments
- when we host Industry Guests, pose questions to them
- participate in in-class exercises

The media sector is changing fast, there are no set answers. Our classes will focus on you becoming fluent with the drivers of sustainable strategies in media.

The format of this course needs your active participation in every class. Teams will be set up for the in-class exercises and

the Playbook Major Project. Working in teams and developing collaboration skills is a key element of this course.

Media Enterprise Snapshot

Due Date: Wed Sep 27, 2023 at 06:00pm EDT

This paper is a low-risk opportunity for students to obtain early feedback and gain an understanding of the assignment objectives in this course. Research, analysis and presentation are important. The paper must include a bibliography of sources. Students will write a brief (5 pages or less) snapshot of a media organization from the list I will post on Canvas on **September 13** (to avoid duplication on the same organization.). Please let me know your choice by **September 19.**

The paper is due on **September 27 @ 6 p.m.** and I will provide feedback by **October 3.**

The paper needs to address:

- Company activity and platforms
- Ownership and management
- Size (revenues) and financial structure
- Value proposition to consumers: what makes them unique?
- Business model: how does the organization make money?
- what are the implications of Generative AI for this organization?*
- Strategic objectives/strategic choices facing the organization*
- Likely future*

*Half of the paper should be devoted to the last three points.

6340 Media snapshot topics

6340 Media snapshot topics.pdf (https://schulich.instructure.com/courses/9422/files/1054043?wrap=1) (https://schulich.instructure.com/courses/9422/files/1054043/download?download_frd=1)

Major Project - The Play Book

Due Date: Tue Dec 12, 2023 at 11:59pm EST

Teams made up of four students will create a Playbook for a media executive in a Canadian media organization of the team's choosing (Note: the teams will be established in the first month of the course; they will also be used for in-class exercises).

Start by meeting with your team and deciding on the organization. Hint: choose an organization for which sufficient public information is readily available (i.e. annual reports as well as analysis). **Please advice me of your organization before you start work -- we want to avoid duplication.**

I would like to review your outline with each team during the week of **November 6**. Please prepare a point form outline including the allocation of work between the members of the team. Please set up a time with me that works for your team.

The Playbook will respond to the fast-changing world and re-position the media company for sustainability and success. The Playbook will include detailed descriptions of the strategies and plans necessary to build a sustainable business

model.

Begin by analyzing the factors in the external environment that are impacting the organization's business model (changes in technology such as Generative AI, new laws, new regulatory framework, changes in consumer behaviour etc.). Present this information in a compelling manner. Include sources to the documents used to prepare this analysis.

Develop detailed strategies and plans covering the following items to re-position the organization's business model for sustainable growth:

- Product
- Content and talent
- Marketing
- Revenue
- Cost re-structuring
- alliances/acquisitions/partnerships
- People and culture
- Capital investments
- Any other strategies you see as critical

The Playbook Major Project will be comprised of two parts:

--a 20-minute class presentation (you are encouraged to include digital media elements) on **December 5, 2023**

--a written document that is presented as a comprehensive/stand-alone and substantial deck, due **December 12, 2023**

Adopt-an-Executive Experience

Due Date: Fri Nov 24, 2023 at 11:59pm EST

Adopt-an-Executive Experience -- Value 25%

In the "Adopt" Experience each student is matched with a senior executive in the media industry, researches the organization and interviews the executive on two occasions.

You will prepare a **12-15 page paper** analyzing the business model of the executive's organization (highlighting strategic challenges, opportunities and choices facing the organization) and describing where it fits in the value chain of the Canadian media sector.

You will prepare and make a **10 minute in-class presentation** (slide presentation and media are optional).

Matching of executives and students:

- List of executives circulated to students on **September 27, 2023**
- Submit your top 4 preferences to me by **September 29, 2023**
- Matches will be provided by **October 3**

Interviews and paper:

- You will set up two virtual Interviews with your executive (in person is also fine)
- Submit your paper (m*ax length: 12-15 pages):* upload on Canvas and share with your colleagues **(November 24)**
- Please complete the Consent Form and send to me (**ldewilde@schulich.yorku.ca (mailto:ldewilde@schulich.yorku.ca)**) with your paper

- Review the papers of your colleagues before the **November 28** class
- Make 10 minute class presentation/participate in class discussion (**November 28)**

Consent Form

2022 ARTM 6340 Consent Form-1.docx (https://schulich.instructure.com/courses/9422/files/1001469?wrap=1)
(https://schulich.instructure.com/courses/9422/files/1001469/download?download_frd=1)

Adopt an Executive Interview Guide

Adopt 6340 2022.pptx (https://schulich.instructure.com/courses/9422/files/1001517?wrap=1)
(https://schulich.instructure.com/courses/9422/files/1001517/download?download_frd=1)

Matches

MATCHES FOR ADOPT AN EXECUTIVE EXPERIENCE / Fall 2023

Hi All:

Please find your match below.

The next steps are:

- to connect with your executive and set up your two virtual meetings asap (note: two of the executives have scheduled vacation; they are committed to getting their meetings with you scheduled. Please let me know if you have any questions.)
- to start your research on the organization of your executive now. (The Interview Guide has been posted on Canvas to help you prepare.)

VB,

Lisa

STUDENT : PARTICIPATING EXECUTIVES MATCHES

John: MARLY ALLAN, VP, NATIONAL SALES, CORUS ENTERTAINMENT

Email: **marly.allan@corusent.com (mailto:marly.allan@corusent.com)**

Carter: ALICIA BARIN, CRTC, COMMISSIONER, QUEBEC AND INTERIM VICE-CHAIR, BROADCASTING

Email: **Alicia.barin@crtc.gc.ca (mailto:Alicia.barin@crtc.gc.ca)**

Gabriel: RENE BOURDAGES, Vice President Cultural Portfolio Management, Telefilm Canada

Email: **rene.bourdages@telefilm.ca (mailto:rene.bourdages@telefilm.ca)**

Udbhav: NANCY CHAPELLE, EXECUTIVE DIRECTOR, BELL FUND

Email: **nchapelle@bellfund.ca (mailto:nchapelle@bellfund.ca)**

Ishita: GERARD DOYLE, VP PRODUCT AND MARKETING, PELMOREX/THE WEATHER NETWORK

Email: **gdoyle@pelmorex.com (mailto:gdoyle@pelmorex.com)**

Ester: DAVID ERRINGTON, PRESIDENT & CEO, ACCESSIBLE MEDIA INC.

Email: **David.errington@ami.ca (mailto:David.errington@ami.ca)**

Jenisse: JOHN FERRI, VP, PROGRAMMING & CONTENT, TVO

Email: **jferri@tvo.org (mailto:jferri@tvo.org)**

Rafia: SCOTT GARVIE. SENIOR VICE-PESIDENT. SHAFTSBURY FILMS

Email: **sgarvie@shaftesbury.ca (mailto:sgarvie@shaftesbury.ca)**

Whitney-Ann: MONIKA ILLE, CEO APTN

Email: **mille@aptn.ca (mailto:mille@aptn.ca)**

Sakib: GAVE LINDO, HEAD OF CONTENT PROGRAMMING, NORTH AMERICA AT TIKTOK, BYTEDANCE

Email: **gave.lindo@bytedance.com (mailto:gave.lindo@bytedance.com)**

Tareef: LAWRIE SCHNEIDER, ASSOCIATE DIRECTOR, CONTENT DISTRIBUTION, CBC

Email: **Lawrie.schneider@cbc.ca (mailto:Lawrie.schneider@cbc.ca)**

Note: Lawrie will be away until October 17 on vacation; plan to book your two meetings after October 17 and use the next couple of weeks to prepare.

Muhammad: JUSTIN STOCKMAN, VICE-PRESIDENT, ENGLISH CONTENT DEVELOPMENT & PROGRAMMING, BELL MEDIA

Email: Justin's EA: **Rowena.Cruz@bellmedia.ca (mailto:Rowena.Cruz@bellmedia.ca)**

Jiwei: KAREN THORNE-STONE, CEO ONTARIO CREATES

Email: **kthorne-stone@omdc.on.ca (mailto:kthorne-stone@omdc.on.ca)**

Note: Karen will be on vacation from October 9—24 so good idea to get your two meetings booked before she departs.

Rebecca: MAGALI SIMARD, DIRECTOR OF INDUSTRY AND COMMUNITY RELATIONS, CINESPACE TORONTO

magali.simard@cinespace.com (mailto:magali.simard@cinespace.com)

Monique: CARRIE PAUPST SHAUGHNESSY, VP SCRIPTED/EXECUTIVE PRODUCER, MARBLEMEDIA

carrie@marblemedia.com (mailto:carrie@marblemedia.com)

Joy: STEPHEN ZOLF, PARTNER, AIRD & BERLIS

szolf@airdberlis.com (mailto:szolf@airdberlis.com)

WRITTEN ASSIGNMENTS: EVALUATION

(source: Adapted from material prepared by Kathy Kubota-Zarivnij, Education, 1999)

Performance Indicators (weight)	FAIL	ACCEPTABLE C (+ or -)	GOOD B (+ or -)	EXCELLENT A (+ or -)
Organization of argument.	Stream of consciousness.	Argument is poorly organized and unfocussed.	Argument is straight- forward and clearly stated.	Argument is focused, creatively structured and clearly stated.
Bibliography	No list provided.	List provided but not in proper format and some missing.	List provided but some references missing.	Complete list with all references properly credited.
Analysis and implications for mgmt.	Descriptive with no analysis.	Simple analysis but no implications for management.	Careful analysis, little theory and some implications for management.	Creative analysis, using theory and thoughtful implications for management.
Use of class and other prof. & personal experience	No use of outside experience and little class experience.	References to some experience (outside and in class); no analysis.	Incorporates much outside and class experience but with little useful analysis.	Very effective and illustrative use of class and outside experience reflects useful analysis.
Writing mechanics	Little evidence of proofreading, spellcheck, punctuation, sentence structure; difficult to discern meaning	Evidence of proofreading, spellcheck, punctuation and sentence structure but still detracts from meaning.	Careful proofreading & spellcheck, punctuation, sentence structure, enables focus on meaning.	Critical proofreading, spellcheck, punctuation, & sentence structure which enhances meaning.

CALCULATING COURSE GRADE

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

- written assignments and class participation are assigned a grade based on the Schulich 9-value index system
- these grades are weighted in accordance with the prescribed Value for each course component and a single numerical grade calculated
- the numerical grade is converted to the applicable letter grade.

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

MODULE 1 - 12 September 2023/Introductions, Overview of Canadian media and external environment, Syllabus and assignments

Sep 12/23

Overview: Module 1 - Introductions, Overview of Canadian media and external environment, Review of Syllabus and assignments

Chapter 1: Introductions (please come prepared to introduce yourself to the class in 2 minutes covering your work and educational experience as well as something else that you are proud of). Over the term, you will practice your intro with the industry guests and achieve the outcome of a clear and compelling way to introduce yourself.

Chapter 2: Overview of structure of Canadian media and the external environment (how upcoming events will impact the sector, with an emphasis on the upcoming semester)

Chapter 3: Review Syllabus, Assignments and Admin

MODULE 2 - 19 September 2023 / Canadian Media Fund (CMF) and new online streaming regulatory regime

Sep 19/23

Overview: Module 2 - new online streaming regulatory regime and Canadian Media Fund (CMF)

Chapter 1: Amendments to the Broadcasting Act (Bill C-11, Online Streaming Act) have brought global streamers into the CRTC's regulatory orbit. The CRTC will put in place a new regulatory regime for the global streamers which will determine the financial (and other) contribution to be made by them to the Canadian sector. How will the business models of independent producers and Canadian broadcasters be affected?

Industry Guest: Peter S. Grant, Adjunct Professor

Chapter 2: How will the new financial contribution from global streamers change the Canadian media sector, the business models of broadcasters and independent producers and the role of the CMF?

How is the CMF supporting growth and inclusion in Canadian media and production? What are the successes and roadblocks of this strategy? How does the new strategy work with the other CMF priorities?

Industry Guests: Valerie Creighton C.M., President and CEO, CMF

Marcia Douglas, VP, Growth & Inclusion, CMF

Rod Butler, VP, Content and Regulatory, CMF

MODULE 3 - 26 September 2023 /TVO case study: Strategic Transformation

Oct 17/23

Overview: Module 3 - TVO case study: Strategic Transformation

A Case Study of Strategic Transformation: How did TVO, Canada's largest public educational media organization, with its educational mandate and government financing, implement a strategic transformation over a critical decade? This case study will include an examination of the catalytic role of digital technology on content production, rights management and distribution, the market opportunity for on-line learning and related talent management issues, against the backdrop of managing relations with the principal shareholder, the Ontario Ministry of Education.

There will be an in-class exercise.

MODULE 4 - 3 October 2023 / Documentaries

Oct 3/23

Overview: Module 4 - Documentaries

Canadian documentaries are finding success both domestically and in global markets. What are the ingredients of this success for feature length and multi-part series -- for the producer and for the broadcaster? How is the value of the intellectual property maximized across multiple platforms and territories? What is the significance of international partners on the content?

Industry Guests:

Jane Jankovic, Executive Producer, Documentaries, TVO (retired)

Michael McMahon, President and Executive Producer, Primitive Entertainment Inc.

MODULE 5 - Childrens' Programming / October 10

Overview: Module 5 - Childrens' Programming

Both animation and live action children's series are finding success in Canada and in international markets by focusing on high quality content. How are the global streaming platforms changing the financial models and the programming and distribution strategies? What is the role of merchandise as a revenue stream? How important are global partnerships? Four leading players will cover how the market for children's content is changing – for broadcasters and for independent producers.

Industry Guests:
J.J. Johnson Founding Partner, Sinking Ship Entertainment.
Kirsten Hurd: Commissioning Editor TVOKids, TVO;
Rennata Lopez, Creative Producer and Georgina Lopez, Executive Producer, Lopii Productions

MODULE 6 - 17 October 2023 / Program Rights

Nov 7/23

Overview: Module 6 - Program Rights

This class will look at how media companies like CBC are responding to the explosion in streaming services (impacts on audiences, revenues, content spending); the implications of "differentiating" a service (things like originals vs acquisitions, territory rights, exclusivity, library content, live streaming, genre specializations); some guiding principles for partnerships between companies; the importance of trying to 'future proof' rights and getting broad platform rights. Some material on accessibility, sustainability and diversity – all of which are figuring into licensing agreements and

production activity at CBC — will also be incorporated. A visit of some of the production spaces will be included.

Industry Guests: John Vekar, CBC

Sharon Gryfe, CBC

Note: class will be held at CBC offices, 250 Front Street West (St. Andrew or Union subway station)

MODULE 7 - 31 October 2023 / CBC

Oct 31/23

Overview: Module 7 - CBC

The Canadian Broadcasting Corporation/Radio Canada is a billion dollar media company providing content that touches every part of Canadian life: from local radio news to the Olympics; from comedy to symphony, from investigative journalism to pre-school animation. It has taken the lead in inclusivity and diversity in all its programming. It has a streaming service (GEM) a successful podcast division and a solid social media presence. It broadcasts in 8 indigenous languages. Its English radio services and its French television are audience leaders. And yet it is a media company in trouble. The last license renewal (under review) from the CRTC (two commissioners dissented) is being challenged by Canadian creators; its ad revenue is declining as are English television ratings. CBC will be further challenged by streaming services soon to arrive, and a 'Defund the CBC' campaign is active in western Canada. This class will examine the challenges of CBC governance, financing and programming; and will propose remedies for a public broadcaster in need.

Guest Lecturer: Professor Trina McQueen, AM&E's director of Curricular Development and Sector Relations, has a long CBC history. She has been a program host and reporter, executive producer of The National and head of CBC News, where she oversaw the launch and development of the CBC news channel, the first in Canada and the third in North America. She has also held senior management positions in programming, regional broadcasting and finance and operations. She was appointed by the government to the CBC Board of Directors in 2010 and named to the CBC News Hall of Fame in 2018. Her favouite CBC programs are "Sort Of", "The Current" and "Power and Politics"

MODULE 8 - 7 November 2023 / Revenues: How is media monetized? (AKA how do we make money?)

Nov 14/23

Overview: Module 8 - Revenues: How is media monetized? (AKA how do we make money?)

The opportunities and risks associated with advertising and subscription fees will be assessed. How has traditional TV advertising adapted to the growth of digital platforms—what are the challenges and opportunities? Some content networks receive monthly subscription payments from cable providers (BDU's): what are the challenges and opportunities facing this revenue stream? What new revenue models are being tested?

Industry Guest:
Barb Mckergow, SVP National Sales, Corus Entertainment

MODULE 9 - 14 November 2023 / Streaming

Nov 7/23

Overview: Module 9 - Streaming

The number of global players involved in streaming content is increasing. This class will examine their different business models including growth strategies, content strategies, as well as the challenges and risks to the business models. Subscriber growth is no longer a given. What are the ingredients of a sustainable business model? How important is ownership of content studios? Is gaming part of the go-forward business model? In Canada, Bell Media has embraced streaming: what are the key elements of a sustainable business model? How is CBC playing in the streaming space with GEM?

There will be an in-class exercise.

MODULE 10 - 21 November 2023 / The CEO Mindset

Nov 21/23

Overview: Module 10 - The CEO Mindset

This class will look at the business model challenges confronting media players through the lens of the CEO. It will weave together the competing tensions and pressures of internal and external strategies, risk management and growth opportunities, short- and long-term dimensions, against the back drop of managing a complex set of stakeholders in an environment that is regulated.

Industry Guest: Wade Oosterman, CEO, Bell Media

MODULE 11 - 28 November 2023 / Adopt an Executive Experience: Student Presentations

Nov 28/23

Overview: Class 11 - Adopt an Executive Experience: Student Presentations

Students will make 10 minute presentations. Please see Assignments for details re expectations.

MODULE 12 - 5 December 2023 / The Playbook: Team Presentations

Dec 5/23

Overview: Module 12 - The Playbook: Team Presentations

Each team will make a 20 minute presentation. Please see Assignments for details re expectations.

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

This is a small seminar class where everyone needs to be present and be “ready to play” every week (i.e. read the pre-readings, stay on top of what is happening in the sector through your own reading, be ready to answer questions and participate in active discussions during the class). The media sector is changing fast, there are no set answers. When we host Industry Guests, you will be expected to pose questions to them.

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/)** .

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.*

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

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

MKTG 6220 3.00: Future of Marketing

Course Outline
Fall 2024

Classroom: N108
Format: In-Class Teaching

Instructor(s)	**Assistant**
Professor M. David Rice N315 Seymour Schulich Building E-Mail: mdrice@schulich.yorku.ca Telephone: 416-736-2100 Ext. 58241 Office hours: Wednesday, 10:00 – 11:00 or immediately after class. Zoom appointments are readily available by request Professor Martin Waxman N304M SSB E-Mail: mwaxman@schulich.yorku.ca Phone: 416-569-0501 Office hours: in person or virtual By appointment: email to set up	Tram Pham N304A Seymour Schulich Building E-Mail: trampham@schulich.yorku.ca

Professor David Rice is a futurist and recognized expert on marketing research. He has taught at Schulich since 1985 and has delivered papers on marketing research topics in over 20 countries. He has provided marketing research consulting to Fortune 500 companies including Microsoft, General Electric, Procter and Gamble, Intel, General Foods, Ford Motor Company, Dell, Panasonic, Hewlett-Packard, and the World Bank. Dr. Rice founded SurveySite in 1998, one of the first companies conducting online market research. SurveySite was acquired by ComScore in 2005. Dr. Rice currently serves as the Executive Director of the **Future of Marketing Institute**, a leading global forum on teaching, research, and outreach on future of marketing topics.

Professor Martin Waxman writes a popular Digital Marketing Trends newsletter, leads social media training workshops, and conducts AI research. He's a LinkedIn Learning instructor, adjunct professor at the Schulich School of Business, co-founder of two agencies, and president of a consultancy. Martin is also a member of the Institute for Public Relations Digital Media Research Center and regularly speaks at events across North America. Martin received the Institute for Public Relations Best Master's Thesis Award in 2019. He has a Master of Communications Management (MCM) from McMaster-Syracuse University. He serves as Associate Director of the Future of Marketing Institute. He is the author of two books of fiction, *The Promised Land* and *Everything in Winnipeg Begins in a Car*.

Brief Description

This course develops students' abilities to reimagine marketing using leading-edge technologies and new conceptual frameworks. Students learn how to research, create, implement, and evaluate pioneering marketing plans for nascent digital technologies. The course teaches students how to communicate novel marketing concepts and strategies to decision-makers. Students learn how to think critically about consumer privacy and ethics in a changing environment.

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Course Learning Outcomes

This course develops students' abilities to reimagine and develop new conceptual frameworks, methodologies, and technologies for future of marketing strategies. Students are challenged to write marketing plans and implementation strategies for novel and complex marketing technologies. The course develops students' abilities to think and write critically about new consumer privacy and ethical issues arising from digital transformation. Students develop skills in foresight thinking and understanding patents to help them conceptualize, formulate and implement new marketing methodologies and technologies. Students gain practical experience in presenting and defending innovative marketing plans to management in a board-room setting.

The specific learning objectives of this course are:

- Develop the ability to research, analyze, and reimagine new conceptual frameworks and technologies for future of marketing strategies.
- Discover and understand patents in marketing and non-marketing related functional areas.
- Write effective marketing and implementation plans for emerging digital technologies.
- Develop evaluation criteria and KPIs for nascent marketing tools and technologies.
- Improve ability to think and write critically about consumer privacy and ethics.
- Effectively communicate novel and complex marketing concepts to management.

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
Generative AI Assignment	1	25	Pairs
Instagram and LinkedIn Post	1	25	Individual
Participation and 4 'Thinking' Exercises'	1	10	Individual
Final Project – 'Pitch Night'			
a. Written Marketing Plan	1	20	Group
b. Presentation to Executives	1	20	Group

Course Material

The course consists of a mix of lectures, discussion, in-class 'thinking', and visualization exercises. Active participation is essential if students are to get the most out of this course. Permalinks to all materials are available on **Canvas** and through York University's OMNI Library system.

Suggested Resources

Future of Marketing Institute (Schulich) Resources

Future of Marketing Institute (FMI) Web Site
Future of Marketing Magazine
Future of Marketing Magazine Archive
Future of Marketing Institute LinkedIn
Future of Marketing Institute Newsletter
FMI Twitter

Industry Resources

Marketing Artificial Intelligence Institute @mktgai
MIT Technology Review @techreview
Swiss Cognitive – The Global AI Hub @SwissCognitive
VR/AR Association @thevrara
Future of Privacy Forum @futureofprivacy
AR Insider @ArInsider
Virtual Humans: @virtual_humans
MMA Global: @MMAglobal
Virtualhumans @virtual_humans
Future Today Institute @fti
Responsible Metaverse Alliance

Thought Leaders (LinkedIn)

David Rice, Martin Waxman, Cathy Hackl, Louis Rosenberg, Paul Roetzer, Ethan Mollick

Thought Leaders (X - Twitter)

@profdavidrice @martinwaxman @cathyhackl @amywebb @paulroetzer @cspenn @joscholz @JulesPolonetsky @bernardmarr @Mike_Stelzner @SpirosMargaris @tomemrich @mikekaput @LouisBRosenberg @CharlieFink @catrionawallace

Podcasts

1. Future of Marketing Institute Podcast
2. The Marketing AI Show
3. Last Week in AI

Newsletters/Substack

1. One Useful Thing
2. Almost Timely Newsletter
3. Marcus on AI
4. Synthedia

Student Preparation for Class and Class Participation: Expectations

Preparation: Expect to spend at least 5-6 hours per week preparing for this class and completing assignments. Learning in this course involves absorbing material in multiple formats (reading articles, watching videos, listening to podcasts). It is important that you read, watch and listen to the required material posted on Canvas prior to attending class. Class slides will be posted on Canvas after the class is completed.

Classroom Participation & Attendance: Your Class Participation Grade will be based on your attendance, contributions to in-class discussion, and performance on hand-in 'Thinking Exercises'.

Late Assignments: Late assignments are not accepted. Additional assignments or extra work in lieu of a missed assignment is not allowed. All assignments will require a hard-copy to be handed in at the start of the class on the day the assignment is due. Students must also submit their assignments to **Turnitin** before class on the day the assignment is due. Instructions on how to use Turnitin on Canvas will be discussed in class.

Class-by-Class Syllabus

Topics, readings, videos, podcasts and other preparations for every class are listed below. Readings, or Permalinks to readings, are available on **Canvas.**

Lecture 1: Introduction to the Future of Marketing

Read

A Practical Guide for Marketers Who Want to Use GenAI, *Harvard Business Review (2023)*

5 Ways Marketing and Sales Leaders Can Embrace GenAI, *Harvard Business Review (2023) (out for now)*

Video: Our Digital Future (2021), *Future of Marketing Institute Video Series. (out for now)*

Video: What Will Happen To Marketing in the Age of AI (2023), *Ted Talk*

Lecture 2: Introduction to Artificial Intelligence and Applications of Generative AI

Read

1. The Economic Potential of Generative AI (2023), McKinsey Report
2. Letheren, Kate ; Russell-Bennett, Rebekah ; Whittaker, Lucas (2020), Black, white or grey magic? Our future with artificial intelligence, *Journal of Marketing Management.*
3. Visit 'Responsible Metaverse Alliance' Web site and review their Charter and Initiatives

Watch

1. What Are the Top Marketing AI Use Cases? (2020), Marketing Artificial Intelligence Institute (Video)
2. Review Web site and Initiatives: The Responsibility Metaverse Alliance

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Lecture 3: Generative AI and Prompt Engineering

Read

Ethan Mollick (2023), **"**Working with AI: Two Paths to Prompting**,** *One Useful Thing Blog*

1. Dale, Robert (2020), "GPT-3: What's it good for?", *Natural Language Engineering Journal*

2. Smith, Thomas (2020), "Experimenting With GPT-3 Felt Like Witnessing a Technological Revolution, *Medium*

3. A robot wrote this entire article. Are you scared yet, human? (2020), The Guardian

Watch

1. Jeff Coyle (2021), "How to Use AI for Content Marketing and the Future of SEO", *Future of Marketing Institute Video Series* (Video)

In-Class Exercise: Creating Marketing Content using ChatGPT (Hand-In)

Lecture 4: Generative AI: Text-to-Image and Multi-Modal

Read

1. Callahan, K. (2020), "CGI Social Media Influencers: Are They Above the FTC's Influence?", *Journal of Business & Technology Law*

2. McAfee, J. (2021), "Virtual Beings: A New Internet-Native Medium for Shared Storytelling", *Medium*

Optional: Block, E. and R. Lovegrove (2021), "Discordant storytelling, 'honest fakery', identity peddling: How uncanny CGI characters are jamming public relations and influencer practices", *Public Relations Inquiry*

Watch

1. The Virtual Influencer (2022) Christopher Travis, CEO of VirtualHumans.org, *Future of Marketing Institute Video Series,* (Video)

Lecture 5: Foresight Thinking and Patents

Read

1. Clarke, Nigel (2018), "The Basics of Searching Patents", *World Patent Information Journal*

2. Buehring, J. and Jeanne Liedtka (2018), "Embracing systematic futures thinking at the intersection of Strategic Planning, Foresight and Design ", *Journal of Innovation Management*.

3. Webb, Amy (2019), "How to do Strategic Planning Like a Futurist", *Harvard Business Review Digital Article.* Schulich Widget for HBR: https://researchguides.library.yorku.ca/HBR

Lecture 6: Hyper-Personalization Through Voice, Sound and Emotion

Read

1. McStay, Andrew (2020) "Emotional AI, soft biometrics and the surveillance of emotional life: An unusual consensus on privacy"**,** *Big Data and Society Journal*

2. Turow, Joseph (2021), "There's a revolution coming in voice profiling and the warning signs are loud and clear"**,** *Scroll-In*

3. Noshad, A. and David Rice (2022), Voice and Sound Intelligence in the Future of Marketing, *Future of Marketing Magazine*

Listen

1. Kinsella, Brett (2021), "Joseph Turow Author of Voice Catchers on Voice Tech, Marketing and Privacy" , *Voicebot Podcast*

In-Class Exercise: Sentient Objects and Future Marketing Research Data Collection.

Lecture 7: Marketing through the 'Internet of Senses'

1. D. Panagiotakopoulos, G. Marentakis, R. Metzitakos, I. Deliyannis and F. Dedes (2022), "Digital Scent Technology: Toward the Internet of Senses and the Metaverse," *IT Professional Journal*

2. Kristina Naumvoski (2021), The Internet of Senses and the Future of E-Commerce, *Future of Marketing Magazine Article Series*

Watch

1. Trendspotting – 10 Hot Consumer Trends 2030 – The Internet of Senses (Video)

Lecture 8: Future Applications of Augmented, Virtual and Mixed Reality/Holograms

Read

1. P.A. Rauschnabel et al. (2022) "What is Augmented Reality Marketing: Its definition, complexity and future (2022), *Journal of Business Research (Special Issue on AR Marketing)*

2. Scholz, J. and Katerine Duffy (2018), "We ARe at home: How augmented reality reshapes mobile marketing and consumer brand relationships", *Journal of Retailing and Consumer Services*

3. Scholz, J. (2021), "Does AR Advertising Work?", *Future of Marketing Institute*

In-Class Exercise: 'Designing marketing messages in a hyper-reality grocery store '

LECTURE 9: MARKETING IN THE METAVERSE AND 'ORCHESTRATED' ADVERTISING

Read

1. Stackpole, Thomas (2022), "Exploring the Metaverse", *Harvard Business Review*
   Schulich Widget for HBR: https://researchguides.library.yorku.ca/HBR

2. Hollensen, S., Kotler P. and M. Oliver (2022) "Metaverse – the New Marketing Universe", *Journal of Business Strategy.*

3. Louis Rosenberg (2022), Marketing in the Metaverse: A Fundamental Shift, Future of Marketing Institute.

Industry Report (Briefly Scan): Meet Me in the Metaverse (2022), *Accenture*

The Metaverse: What Marketers Need to Do to Prepare (2021) *Social Media Marketing* (Podcast)

LECTURE 10: REIMAGINING MARKETING, BRANDS AND COMMUNITY THROUGH WEB3

Read:

1. Chohan, R and J. Paschen, "What marketers need to know about non-fungible tokens (NFTs)" (2021). *Business Horizons*

2. Sundararajan, Arun (2022), "How Your Brand Should Use NFTs." *Harvard Business Review*.
   Schulich Widget for HBR: https://researchguides.library.yorku.ca/HBR

Industry Report (Briefly Scan): Branded Nft's 2021 Intelligence Report (2021), Catherine Henry, *Media Monks*

Listen

The Metaverse: What Marketers Need to Do to Prepare (2021), Social Media Marketing *(Podcast)*

Michael Stelzner, How Brands can Integrate with Web3 (2022) *Crypto Business (Podcast)*

LECTURE 11: PRIVACY AND ETHICAL CHALLENGES WITH NOVEL MARKETING DATA

Read:

Rahnama H. and Alex Pentland (2022), The New Rules of Data Privacy, *Harvard Business Review*
Schulich Widget for HBR: https://researchguides.library.yorku.ca/HBR

Heller, B. and A. Bar-Zeev (2021), "The Problems with Immersive Advertising: In AR/VR, Nobody Knows You Are an Ad", by Brittan HellerAvi and Bar-Zeev**,** *Journal of Online Trust and Safety*

Watch

Rosenberg, Louis (2022), "Should We Regulate the Metaverse", *Future of Marketing Institute Video Series* (Video)

Discussion/In-Class Exercise: Issues in diversity, equity and inclusion with future of marketing technologies.

LECTURE 12: PITCH NIGHT: TEAM PRESENTATIONS

Teams will present their final projects to a team of 4 Future of Marketing expert judges in a **'Pitch Night'** format. Each team will have 20 minutes to make their pitch to the judges, including time for Q/A.

Group Projects: Group Project papers handed-in. Hard copy required and paper must be submitted to Turnitin before the start of class.

Written Assignments/Projects: Descriptions

Due Date
TBA

Research Paper (Individual Assignment): Value: 25% (Individual)
In this assignment, students will investigate the application of an emerging technology or methodology in the field of marketing. Topics will be unique to each student and assigned randomly by the Professor. The paper should include a discussion of specific use cases, limitations and opportunities with the proposed technology or methodology in one or more industries. Papers should address how the proposed technology/methodology will enhance the field of the marketing and prospects of an organization. Top papers will show creativity and look out into how the technology or methodology will impact marketing, and the marketing function, in both the medium and long term.

Top papers have the opportunity to be published in the Future of Marketing Magazine and be featured on the Future of Marketing Institute Web site.

Length: Papers should be a minimum of 1,500 words to allow for depth of research into the topic. There is no maximum length of the paper.

Due Date
TBA

New AI Tool Evaluation: Value 25% (Work in Pairs)

In this assignment, students will pick a new AI tool and provide a comprehensive evaluation of the tool for management. The evaluation will include an overview of what the tool does, discuss pros and cons, pricing options, and ethical concerns. The final report will include a recommendation as to whether management should adopt the tool into their business.

Length: The project includes two deliverables

- 8 to 10 slide powerpoint report
- Short video presentation (up to 5 minutes in length). Videos must be produced and edited and can include music, and other creative elements. Students have the option of appearing in the video live or as an avatar.

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Due Date:
TBA

Future of Marketing Technology/Methodology Business Plan and Implementation: Pitch Night (Group Project):

For this assignment, student teams will use foresight thinking, brainstorming and an examination of patent databases to develop a new future marketing technology, service or product. After developing the technology/service/product, teams will create a comprehensive written marketing plan to introduce or 'pitch' the method or technology to an organization.

Marketing plans will contain a detailed explanation of the technology, specify potential KPIs, and detail how implementation would be conducted. Paper will also discuss potential dangers, to the consumer or organization, by introduction of the new technology or method. While the new technology developed by the team can 'build upon' existing future of marketing concepts discussed in class, top grades will be awarded to papers that present truly novel approaches to marketing.

All teams will present their ideas to a group of senior marketing executives during a formal Future 'Pitch Night' event. Other Schulich stakeholders, faculty and students in other programs/classes will be invited to attend the Pitch Night event.

Max length: There is no minimum or maximum number of pages for this assignment
Point Allocation: *Written Paper: 20%, Presentation: 20%*

last updated: Mar 07 5:03pm EST.

Schulich School of Business

MKTG6321 W2024 **CREDITS: 3.00**

MKTG 6321 X - ENTERTAINMENT CULTURE AND MARKETING

THU 19:00-22:00 MB G102

Office Hours

I don't have specific office hours but am on Campus most of Wednesday and Thursday, making them great days to meet in person. If a zoom meeting works for you, it works for me as well. Either way, if you would like to meet, please send me an email and we will figure out a time to meet

INSTRUCTOR

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STEVE PULVER BIOGRAPHY

I have spent more than 40 years marketing products at companies such as
1. Procter & Gamble, where I worked on the Downy, Cheer, and Coast brands,
2. CBS Records (now Sony Music) where I contributed to projects by artists such as Bruce Springsteen, Michael Jackson, LL Cool J and The Beastie Boys,
3.Echo Advertising, the entertainment focused advertising agency that I co-owned,
4. Mill Street Brewery where I was a shareholder and the marketing director

From 1987-2002 I was a partner in a highly successful Advertising Agency, Echo Advertising. There, I worked on many hundreds of marketing projects in the areas of entertainment , food, beverage, telecom, software, and financial services.

From 2006-2015 I ran the marketing for Mill Street Brewery, Canada`s number one craft brewery. This included a variety of activities including many new product introductions, promotions at bars and nightclubs, festival sponsorships, live music programs and movie
promotions.

BRIEF DESCRIPTION

Using an effective combination of readings, class discussions, real world entertainment marketing cases, and guest speakers, this course develops a managerial and socio-cultural perspective on the marketing of entertainment. Attention is focused on analysing the relationship between the global marketplace and entertainment business decision-making; the determination of entertainment products, services, experiences, prices, channels and communications strategies for licensing, live concerts, sponsorship, entertainment brands, movies, prerecorded music, streaming, nightclubs, and live theatre. Prerequisite: SB/MKTG 5200 3.00.

COURSE LEARNING OUTCOMES

The course is intended to broaden and deepen students' knowledge of the marketing management of entertainment with respect to emotional connection, meaning-making, personal relevance, consumer communities, and street-level technological use that can be useful across a range of managerial contexts and careers. These include helping to build entertainment related marketing skills associated with the four Ps, segmentation, targeting and positioning, market oriented strategic planning, advertising development and assessment, entrepreneurial new product design, management of technology, marketing research, promotions, public relations, viral marketing, virtual communal marketing, and entertainment or mass communications consulting.

Of note there will be a high degree of focus placed upon the economics of Entertainment Marketing.

COURSE MATERIAL

Please see the step by step instructions below to purchase the materials required for your course.

Course: MKTG 6321 X Winter 2024 Course Kit
Professor(s): Steve Pulver
Starting: December 7, 2023
Ending: April 19, 2024

1. Go to the Ivey Publishing website at **www.iveypublishing.ca (https://www.iveypublishing.ca/)**
2. Log in to your existing account or click "Register" to create a new account and follow the prompts to complete the registration. If registering, choose the "Student" role.
3. Click on this link or copy into your browser: **https://www.iveypublishing.ca/s/ivey-coursepack/a1ROF00000014G62AI (https://www.iveypublishing.ca/s/ivey-coursepack/a1ROF00000014G62AI)**
4. Click "Add to Cart".
5. Go to the Shopping Cart (located at the top of the page), click "Checkout", and complete the checkout process.
6. When payment has been processed successfully, an Order Confirmation will be emailed to you immediately and you will see the Order Confirmation screen.
7. Once you have completed your order, click on your username on the top right --> Orders --> Purchases

DIGITAL LEARNING EXPERIENCES: If a digital learning experience is included in your coursepack, you will be able to go directly to the course through a link on the purchased order.

IMPORTANT: Access to downloadable files will expire on the course end date, so be sure to save a copy on your computer. The downloadable file is a PDF document that can be opened using Adobe Reader. This material is for your personal use only and is not to be shared, reproduced, or distributed in any form.

NEED HELP ? Contact your professor directly or email Ivey Publishing's Customer Support Team via a **Service Ticket (https://www.iveypublishing.ca/s/contact-us)**
This is an automated message - please do not reply to this email

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Group Assignment - Innovation 15%			
Minor Group Assignment - Innovation		15%	Thu Jan 25, 2024 at 07:00pm EST
Individual Assignment Recorded Video Presentation (5%) and Slide Deck (5%) 10%			
Individual Assignment Recorded Video Presentation (5%) and Slide Deck (5%)		10%	Thu Feb 8, 2024 at 07:00pm EST
Zoom Presentation Tips & Resources omited from final grade.		0%	Thu Feb 8, 2024 at 07:00pm EST
SUBMIT SLIDE DECK HERE (Max File Size 5 MEGS) omited from final grade.		0%	Thu Feb 8, 2024 at 07:00pm EST
SUBMIT VIDEO HERE omited from final grade.		0%	Thu Feb 8, 2024 at 07:00pm EST
Major Group Assignment - Entertainment Marketing Case Analysis & Presentation - Due Beginning Feb 15 and Ending Mar 28 30%			
Case Analysis		20%	
Presentation		10%	
Individual Assignment: Take Home Exam: Final Entertainment Marketing Plan 35%			
Individual Assignment: Take Home Exam: Final Entertainment Marketing Plan		35%	Thu Apr 4, 2024 at 07:00pm EDT
Class Participation 10%			
In Class Participation		10%	Thu Apr 4, 2024 at 07:00pm EDT
90% Course Evaluation Bonus 1%			
Course Evaluation Bonus		1%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Minor Group Assignment - Innovation

Due Date: Thu Jan 25, 2024 at 07:00pm EST

During the break of the first class, the class will self-divide into groups. Due to the various comings an goings, these groups will be confirmed at the beginning of class 2. The size of the groups will be determined by the total enrolment in the section. Each group will be required to complete this assignment, and submit it on Canvas Jan 25th , before the beginning of class.

Of note, you will work with this group for this project as well as for the major group assignment.

Apply the concepts of 100 mile per hour thinking and intergalactic thinking that we discussed and used in our innovation session to develop 3 new product ideas and concept statements for an entertainment product/company of your choice. Please use the following two galaxies for your project:

1. Things you might have found in Elvis Presley's Garage (10 of them)
2. Things that are Green (10 of them)

Please prepare a 6 page report:

Page 1 is a cover page with background on the company and what the objectives of the new product are: If you don't know it, make it up.

Page 2 is the list of 10 Things you might have found in Elvis Presley's Garage

Page 3 is your list of 10 Things that are Green

Page 4,5,6 are the 3 new product ideas and concept statements that you developed

This is due week 3, Jan 25, a week after the innovation lab

The total assignment is worth (15%)

Please see the marking grid for further details.

If you find writing in English challenging, I recommend you get a copy of a book called "Elements of Style" by Strunk and White. It costs between $10 and $15 and you will keep it forever.

Individual Assignment Recorded Video Presentation (5%) and Slide Deck (5%)

Due Date: Thu Feb 8, 2024 at 07:00pm EST

Presentation skills are key in business, and it is equally important to be a skilled presenter live and on line. Accordingly, to complete this assignment successfully, you will create a slide deck and video presentation about entertainment marketing.

To be successful you must find an article about entertainment marketing (not already contained in the readings), and create a recorded video presentation of no more than 5 minutes in length.

Your slide deck (worth 5%) and video presentation (worth 5%) should be submitted via the correct tab on Canvas. This is important because the video files are too big to download easily while the deck files (which must be under 5 MEGS) are easy to download

Your work should briefly summarize the contents of the article, state why you think the article is of some importance in the area of entertainment marketing, and provide your opinion with respect to whether or not you agree with what is

being said.

Please note: do not put the slide in your video presentation. Therefore the video presentation must be a 100% full screen view of you. Equally important, the slide deck and the video must each stand on their own in fulfilling the deliverables for the assignment

Please see marking grid for further details

This assignment is worth 10% of your final grade

This is due before class 5 begins on Feb 8

Zoom Presentation Tips & Resources

Due Date: Thu Feb 8, 2024 at 07:00pm EST

Here are some tips on how to make your Zoom presentations great

- Cameras on for Presenters
- Dress Professionally
- Rehearse
- Look at the Camera, Not at Your Slides
- Don't Read Your Slides

Here are some resources to help you make your Zoom presentations great:

https://www.forbes.com/sites/shephyken/2020/07/05/how-to-make-better-zoom-calls-or-any-other-type-of-video-call/#71df9cc113e6 (https://www.forbes.com/sites/shephyken/2020/07/05/how-to-make-better-zoom-calls-or-any-other-type-of-video-call/#71df9cc113e6)

- **https://www.gend.co/blog/best-practice-tips-for-using-zoom (https://www.gend.co/blog/best-practice-tips-for-using-zoom)**
- **https://oit.duke.edu/help/articles/kb0031494 (https://oit.duke.edu/help/articles/kb0031494)**
- **5 Tips for delivering ZOOM presentations like a pro. (https://www.youtube.com/watch?v=9iArNac6JRU)**

(https://www.youtube.com/watch?v=9iArNac6JRU)

SUBMIT SLIDE DECK HERE (Max File Size 5 MEGS)

Due Date: Thu Feb 8, 2024 at 07:00pm EST

One key element to remember here... You must ensure that the slide deck stands on its own in terms of fulfilling the deliverables. Don't rely on the reader of your slide deck to be paying strict attention to what you are saying when you are presenting. I will be, but in business, as many of you know, that isn't always the way things work.

Your audience is likely as busy as you are and might not be focused on your words as you say them.

SUBMIT VIDEO HERE

Due Date: Thu Feb 8, 2024 at 07:00pm EST

Case Analysis

This is your second group assignment and as mentioned previously, you will be working with the same group you worked with for the ***Innovation Assignment***.

Each group will be assigned and must submit a written case analysis and will present that case analysis during a scheduled week as detailed on the next page.

Your paper will be graded on 3 dimensions as follows:

1. **An Executive Summary of the answers to the questions which are to follow.** The Executive Summary should show your ability to use the formats we discussed in class.

This is worth (5%)

2. Your ability to answer the specific questions ***asked about the case in the course outline*** by integrating learning from the lectures **and** discussions **and** readings **and** cases we have studied through the week you submit your paper and do your presentation.

I am looking for a comprehensive approach to this integrative thinking assignment. For perspective, to earn 10 out of 10 here, I am looking for a minimum of 10 references with examples from the lectures **and** discussions **and** readings **and** cases

This is worth (10%)

3. Your writing style, grammar and punctuation

This is worth (5%)

The total case analysis is worth (20%)

Group Cases & Presentations

Pokemon Go -Due Week 6- ***Feb 15***

Transformers **and** Harry Potter (2 cases, 2 groups)-Due Week 7-***Feb 29***

Radiohead-Due Week 8-***Mar 7***

Disney **and** Spotify (2 cases, 2 groups)-Due Week 9-***Mar 14 THIS CLASS WILL BE HELD REMOTELY***

Marquee: Reinventing The Business of Nightlife-Due Week 10-**Mar 21*THIS CLASS WILL BE HELD REMOTELY***

Hamilton (2 cases 1 group)-Due Week 11-***Mar 28***

The written case report is not to exceed 10 pages, 12 pt, double-spaced, excluding the exhibits. CASES LONGER THAN 10 PAGES WILL BE PENALIZED! A letter grade will be deducted for each page more than 10.

As mentioned previously, if you find writing in English challenging, I recommend you get a copy of a book called “Elements of Style” by Strunk and White. It costs between $10 and $15 and you will keep it forever.

Presentation

You will have a maximum of 25 min to present your analysis and recommendations. Your presentation will be followed by a class discussion.

The presentation will be graded on:
Substance (key issues, insights, recommendations)

This is worth (3%)

Style (professional, clear, persuasive)

This is worth (3%)

Creativity (Is there a Big Idea holding the presentation together? Is it fun? Is the class engaged?... Please note a Q and A session with Kahoot or a similar platform is not a big idea) This is a challenge on Zoom, but let's do our best to be creative with the medium.

This is worth (4%)

The total presentation is worth (10%)

The total project is worth (30%)

Each member of the group is expected to contribute equally to the written and oral presentation.

Group Cases & Presentations

Pokemon Go -Due Week 6-**Feb 15**

Transformers **and** Harry Potter (2 cases, 2 groups)-Due Week 7-**Feb 29**

Radiohead-Due Week 8-**Mar 7**

Disney **and** Spotify (2 cases, 2 groups)-Due Week 9-**Mar 14**

Marquee: Reinventing The Business of Nightlife-Due Week 10-**Mar 21**

Hamilton (2 cases 1 group)-Due Week 11-**Mar 28**

Individual Assignment: Take Home Exam: Final Entertainment Marketing Plan

Due Date: Thu Apr 4, 2024 at 07:00pm EDT

The Final Paper

I believe the best way to think about your final assignment is to think of this as an open book, take home exam where your memory is not being tested. Please note, this is **NOT A RESEARCH PAPER. THIS IS A TAKE HOME EXAM**

Accordingly, there is a maximum of 2 outside references allowed.

What I am testing is your ability to:

1. demonstrate learning from each week of the course; and

2. integrate the 12 weeks of course material into a cohesive whole.

To accomplish this, each student will develop a Marketing Plan for a **Specific Entertainment Event.** This **Specific Entertainment Event** is a massive party celebrating the university/college graduation of any or all Ontario students.

Your plan must build an event that will be profitable and encompass all of the areas of entertainment marketing covered in the course. The plan must also cover the marketing basics of price, product, promotion and distribution.

You will develop an integrated marketing plan covering these elements and validate your plan by making specific reference to 12 weeks of lectures **and** cases **and** readings **and** class discussions.

The objective is for you to demonstrate your understanding of the material not in the traditional way of memorizing it, but in the more practical way of applying it to the marketing plan for your entertainment event. This means that your paper needs to cover the following topics:

Aristotle on Content, Innovation, Licensing, Live Performance and Venue, Sponsorship, Night Clubs, Gaming, Movies, Pre Recorded Music, Audio and Video Streaming, Live Theatre and Integrated Marketing.

Additionally, you must build a financial model for the event proving your recommended plan is profitable.

Your final paper will be graded on 4 dimensions as follows:

- **An Executive Summary of the plan which is to follow**. The Executive Summary should show your ability to use the format discussed in class 1. **This is worth (10%)**

The Quality of Your Marketing Plan for the End Year Party

Here, again, I am looking for a comprehensive approach to this integrative thinking assignment. Your grade will be based on how you demonstrate the depth and breadth of your ability to integrate the lectures **and** discussions **and** readings **and** cases we have studied through week 12, into your paper. For perspective, to earn 15 out of 15 here, I am looking for a minimum of 15 references citing examples from the lectures **and** discussions **and** readings **and** cases.

Please note, this is NOT A RESEARCH PAPER. THIS IS A TAKE HOME EXAM.

Accordingly, there is a maximum of 2 outside references allowed. This is worth (15%)

The Financial Viability of Your Plan This is worth (5%)

Your writing style, grammar and punctuation This is worth (5%)

The total assignment is worth (35%)

Please see the marking grid for further details.

The final written plan is not to exceed 12 pages, 12 pt, double-spaced, excluding the exhibits. PLANS LONGER THAN 12 PAGES WILL BE PENALIZED! A letter grade will be deducted for each page more than 12.

This is due in class on week 12, April 4 by 7:00 pm

In Class Participation

Due Date: Thu Apr 4, 2024 at 07:00pm EDT

In Class Participation – 10%

Your presence and contribution to in-class learning is vital. This means being on time, well prepared, contributing, listening and building on others' ideas and being ready to disagree with others and to develop your own position. Participation is evaluated based on the quality and quantity of your contribution to discussions in class. If you are unable to attend a class, please let me know in advance. **If you miss a class and do not want it to negatively impact on your grade, please submit your written case notes and analysis reflecting how you would have participated had you attended class**. Any absence from class does not excuse you from assignment deadlines. Class participation will be evaluated on an individual basis.

If you would like a voice in your participation grade please submit the participation self assessment form with your final assignment

Course Evaluation Bonus

It's actually important that you complete a course evaluation for each course you take for a number of reasons.
-First it helps protect the value of your degree by ensuring that the classroom instruction at Schulich is of the highest caliber
-Second, it helps ensure Schulich attracts a high quality student body, by ensuring quality in class experiences.

If that isn't enough reason, we are also allowed to award grades.

Specifically, if 90% of the class completes the course evaluation, each student in the class will be awarded 1 extra mark.

In the past, this extra mark has made a difference between a B and B+, or a B+ and an A for a number of students each semester.

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 -Course introduction...There's No Business Like Show Business, Jan 11

Jan 11/24

Overview: Course Introduction...There's No Business Like Show Business

Class Session

Description: During this class we will introduce ourselves to one another, form working groups for two projects (same group for each project),introduce the course, go over the assignments and grading, discuss the nature of entertainment marketing, define it for the purpose of this class, and talk about what makes a hit

Readings

Pine and Gilmore, *Welcome to the Experience Economy,* Harvard Business Review July-August 1998(library search)
Elberse, A (2009, 2011) *The Creative Industries: Managing and Marketing Talent* Harvard Business School Publishing, Boston Mass**(course kit)**
Aristotle's Poetics
https://en.wikipedia.org/wiki/Poetics_(Aristotle)
(https://en.wikipedia.org/wiki/Poetics_(Aristotle))
"The 1991 Memo that Predicted Hollywood's Future"
https://www.denofgeek.com/movies/the-1991-memo-that-predicted-hollywoods-future/ (https://www.denofgeek.com/movies/the-1991-memo-that-predicted-hollywoods-future/)

Assigned work due

Individual introductions, groups formed for the innovation assignment and case analysis projects. Specific cases will be assigned to specific groups.

Class 2 - Innovation Lab, Jan 18

Jan 18/24

Overview: Innovation Lab

Class Session

Week 2

Description

The session focuses on developing new concept ideas via group work to demonstrate how new entertainment marketing concepts can be developed

Readings

Monahan, T. Intergalactic Thinking, The Do it Yourself Lobotomy, John Wiley & Sons Inc, New York, 2002. pp: 341-348 **(k)**
Kanter, R.M. The Middle Manager as Innovator, HBR, J/A, 2004 (library search)

Kim &Mauborgne, Blue Ocean Strategy, How to Create Uncontested Market Space Harvard Business Press Chapters Feb 3, 2015, Product number 978-1-6336-9082-**(k)**

Assigned work due

Final Groups confirmed

Class 3 - Marketing Intellectual Property: Licensing, Economic and Legal Principles, Jan 25

Jan 25/24

Overview: Marketing Intellectual Property: Licensing, Economic and Legal Principles

Class Session

In this class we will discuss theory and methods for developing marketing programs in a variety of channels using funding from a variety of sources.
Licensing will be our focus

Assigned Readings, Cases, etc.

Case: Jurassic Park, Quelch, HBS (course kit)

1. What criteria should they choose for selecting marketing partners?
2. What business are movie studios in today vs. where they were pre 1980?
3. What recommendations would you make to a studio to help ensure the success of its next mega release?

Readings:

Quelch, J.A. *How to Build a Product Licensing Program* HBR May-June 1985 pp 186-189 (library search)

Introduction to licensing, types of licensing, global licensing, why license **https://licensinginternational.org/what-is-licensing/ (https://licensinginternational.org/what-is-licensing/)**

Licensing Business for Entertainment Industry Grows 4.3% to $51 Billion in 2013 **https://variety.com/2014/biz/news/licensing-business-for-entertainment-industry-grows-4-3-to-51-billion-in-2013-1201221143/ (https://variety.com/2014/biz/news/licensing-business-for-entertainment-industry-grows-4-3-to-51-billion-in-2013-1201221143/)**

Assigned Work Due: Group Innovation Report

Class 4 - The Live Concert Business , Feb 1

Feb 1/24

Overview: The Live Concert Business

Class Session

In this segment of the course we will look at the key issues surrounding the live concert business.

Case: Lady Gaga A .Elberse and Christensen HBS (course kit)

1. If you were Troy Carter, which of the three touring options would you pursue for Lady Gaga? Why?
2. How much money does Gaga stand to gain (or lose) under each option? In your view do the potential rewards justify the investment? And can Carter do anything to mitigate the risks of pursing a solo tour?
3. Are Lady Gaga's main partners – Live Nation, WME and her record label Interscope – likely to have the same preferences regarding the three options? Are their incentives generally aligned with Gaga's?
4. How would you evaluate Gaga's launch as an artist up to September 2009? How can her team best go about further developing her touring and recording career going forward? And how can team Gaga best leverage her social media presence?
5. How important are concert ticket sales versus recorded music sales for an artist like Gaga? Where should team Gaga focus its efforts in the future?

Readings:

Bradley, Cespedes& Herman, *Live Nation Faces the Music, Harvard Business School, March 18, 2013 ISBN 9-709-441* **(course kit)**

Cohan, Jillian, The Show Must Go On

https://www.aei.org/articles/the-show-must-go-on/ (https://www.aei.org/articles/the-show-must-go-on/)

The Mastermind Behind Coachella J. Seabrook April 17, 2017

http://ezproxy.library.yorku.ca/login?url=https://link.gale.com/apps/doc/A490953786/AONE?u=yorku_main&sid=bookmark-AONE&xid=9b2f2d20 (http://ezproxy.library.yorku.ca/login?url=https://link.gale.com/apps/doc/A490953786/AONE?u=yorku_main&sid=bookmark-AONE&xid=9b2f2d20)

Class 5 - Sponsorship in Entertainment Marketing, Feb 8

Feb 8/24

Overview: Sponsorship in Entertainment Marketing

Class Session

In this session we will discuss the role sponsorship plays in helping entertainment properties succeed via creating awareness among the public. We will also discuss how sponsors make decisions on what entertainment properties to sponsor, why sponsors choose the properties they do and how rights holders (artists and properties) view sponsorship

Case: Cineplex Entertainment: The Loyalty Program Hardy and Zatsma Ivey, (course kit)

1. What marketing and sponsorship elements are present in the Cineplex program?
2. What elements are missing?
3. Why does Scotiabank want to be involved in the program?
4. If you were the champion of the program at Scotiabank, and one of your key objectives were to make Scotiabank the first choice for Canada's youth, what program elements would you deem essential to make SCENE deliver on the objective

Readings:

Eventbrite Sponsorship Blog (https://www.eventbrite.com/blog/sponsorship-packages-ds00/)

https://www.eventbrite.com/blog/sponsorship-packages-ds00/ (https://www.eventbrite.com/blog/sponsorship-packages-ds00/)

Reaching Millenials at Festivals **https://www.forbes.com/sites/julianmitchell/2017/04/25/sold-out-how-should-big-brands-rethink-reaching-millennials-at-festivals/#29cf34227e7e**

(https://www.forbes.com/sites/julianmitchell/2017/04/25/sold-out-how-should-big-brands-rethink-reaching-millennials-at-festivals/#29cf34227e7e)

1. **Farrelly (http://hbr.org/search/Francis+Farrelly) , (http://hbr.org/search/Francis+Farrelly)** Quester , **P. (http://hbr.org/search/Pascale+Quester)** Investigating Large-Scale Sponsorship Relationships as Co-Marketing Alliances, *Business Horizons*, *48*(1), 55–62. **(LR) http://ezproxy.library.yorku.ca/login?url=https://doi.org/10.1016/j.bushor.2004.10.003 (http://ezproxy.library.yorku.ca/login?url=https://doi.org/10.1016/j.bushor.2004.10.003) (http://ezproxy.library.yorku.ca/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=15990964&site=ehost-live)**

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Assigned work due Individual video presentation and slide deck.

Please ensure to submit using correct tab in assignments

Class 6 - Gaming and AR with Pokemon Go, Feb 15

Feb 15/24

Overview: Gaming and AR with Pokemon Go

Class Session

Gaming and AR with Pokemon Go

Description: Here we discuss Pokemon Go, which still gets 230,000,000 cites on Google, years after it peaked in popularity. We can learn a lot about the entertainment business from this fad, and we will also discuss key entertainment concepts such as franchise, merchandising, product life cycle and technology.

Case:

Niantic: Pokemon Go and the Rise of Augmented Reality Gaming, Sultan and Wesley, Ivey Publishing copyright 2019 Northeastern University, D'Amore-McKim School of Business Product # W19082 (course kit)

What was the consumer response to Pokemon Go in the first few weeks of launch? Why? What was the response later? Why?

Why did Pokemon Go grow so rapidly?

What is your assessment of the business model Niantic is using for Pokemon Go?

Should Niantic continue to evolve Pokemon Go by using teams and live events or should it create an entirely new gaming experience

What other entertainment marketing opportunities do you see for Pokemon Go and why will they be profitable for the company?

Readings

Ready Steady Game-An Ericsson Consumerlab Report Report **https://www.ericsson.com/en/reports-and-papers/consumerlab/reports/ready-steady-game (https://www.ericsson.com/en/reports-and-papers/consumerlab/reports/ready-steady-game)**

World of Gaming Report- **https://www.globalwebindex.com/hubfs/Downloads/The%20World%20of%20Gaming%20Report utm_campaign=Generic%20nurture%202019&utm_medium=email&_hsmi=83249182&_hsenc=p2A 9PA2HvCbV81y43guM887UunfUATBj--QrjrKm_Aglxkld_qc_nIQ5jK9AYPxFr5MrjBOoX0MmYWbuC7oW8S8-jtz2Gxg&utm_content=83249182&utm_source=hs_automation (https://www.globalwebindex.com/hubfs/Downloads/The%20World%20of%20Gaming%20Report.pdf?utm_campaign=Generic%20nurture%202019&utm_medium=email&_hsmi=83249182&_hsenc=p2ANqtz-9PA2HvCbV81y43guM887UunfUATBj--QrjrKm_Aglxkld_qc_nIQ5jK9AYPxFr5MrjBOoX0MmYWbuC7oW8S8-jtz2Gxg&utm_content=83249182&utm_source=hs_automation)** Students can search for the title of the

report in the “Resources” section of the website, and will need to submit their email address to download the report.
Bump, Pamela, The Video Game Industry Is Growing: Here Are 4 Ways Brands Are Reaching Gamers **https://blog.hubspot.com/marketing/video-game-marketing (https://blog.hubspot.com/marketing/video-game-marketing)** **(https://blog.hubspot.com/marketing/video-game-marketing)** Tang, Allie K.Y. Key Factors in the Triumph of Pokemon Go, Copyright 2017 Kelley School of Business, Indiana University **(library search)**
Assigned Work Due: Major Group Assignment and Presentation on Pokemon Go

NO CLASS Feb 22...READING WEEK

Class 7 - The Movie Business Hollywood Would Much Rather Make Rocky 2 Than Rocky, Feb 29

Feb 29/24

Overview: The Movie Business: Hollywood Would Much Rather Make Rocky 2 Than Rocky

Class Session
Creative and integrated marketing campaigns are the key to success in this highly competitive entertainment focused economy. Additionally, it appears that the sequel business might be the keys to success in Hollywood. In this segment of the course we cover these topics by looking at two blockbuster movie series...Transformers and Harry Potter

Cases: Harry Potter and Transformers (course kit) -In this class we will have two groups’ present...a battle of the entertainment brands so to speak

Harry Potter (James Sirius WB) Questions

1. What will Paramount do in respect of the launch date for Transformers 3: Dark of the Moon?
2. What is special about movie competition? What other business decisions are similar? What is the impact of 3D technology on this decision?
3. What considerations must you make about when to release your movie?
4. How many tickets does Warner Bros. have to sell to break even on the movie in week 1?
5. What other marketing actions would you recommend? If you owned the rights to Harry Potter, how would you value the rights?

Transformers (Judy Witwicky Paramount) Questions

1. What will Warner Bros do in respect of the launch date for Harry Potter and the Deathly Hallows Part 2?
2. What is special about movie competition? What other business decisions are similar? What is the impact of 3D technology on this decision?
3. What considerations must you make about when to release your movie?
4. How many tickets does Paramount have to sell to break even on the movie in week 1?
5. What other marketing actions would you recommend? If you owned the rights to Transformers, how would you value the rights?

Readings:

Katz, B. The 6 Dos and Don'ts of Legacy Sequels
https://observer.com/2020/06/the-6-dos-and-donts-of-legacy-sequels/

Davidson, Adam How Does the Film Industry Actually Make Money?

http://ezproxy.library.yorku.ca/login?url=https://www.proquest.com/docview/1705861178
(http://ezproxy.library.yorku.ca/login?url=https://www.proquest.com/docview/1705861178)

Zipin, Diana How Exactly do Movies Make Money
https://www.investopedia.com/articles/investing/093015/how-exactly-do-movies-makemoney.asp
(https://www.investopedia.com/articles/investing/093015/how-exactly-do-movies-make-money.asp)

Assigned work due ;**Major Group Assignment and Presentation on Transformers and Harry Potter**

Class 8 - Pre recorded Music-Making the Band, March 7

Mar 7/24

Overview: Pre recorded Music-Making the Band

Class Session

The music business has always been a tough go of it for everyone involved. Success is achieved by a very few and we will learn why that is and how it is likely to change in the digital age

Assigned Readings, Cases, etc.

Case: Radiohead A&B, Elberse and Beergsman (k)

1. Why have a handful of major record companies dominated the music industry through most of the last century?
2. How does the advent of the Internet change the structure and economics of the music industry? Will major record companies continue to dominate the business?
3. Does Radiohead's approach to the sales of *In Rainbows* make sense? Why or Why not?
4. How could other artists benefit from Radiohead's experience with online music sales?

Readings

Elberse, A. Bye-Bye Bundles: *The Unbundling of Music in Digital Channels.2010* Journal of Marketing Vol 74, May 2010 pp 107-123
123 http://ezproxy.library.yorku.ca/login?url=https://journals.scholarsportal.info/details/00222429/v74i0003/107_bbtuomidc.xml or http://ezproxy.library.yorku.ca/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=cms&AN=49071064&site=ehost-live
(I-PA) Higher Profits for the Major Record Labels? New Research Suggests a Counterintuitive Strategy. Knowledge at Wharton, January 20, 2010
https://knowledge.wharton.upenn.edu/article/higher-profits-for-the-major-record-labels-new-research-suggests-a-counterintuitive-strategy/
http://knowledge.wharton.upenn.edu/article.cfm?articleid=2417
(http://knowledge.wharton.upenn.edu/article.cfm?articleid=2417)

(http://knowledge.wharton.upenn.edu/article.cfm?articleid=2417)
(http://knowledge.wharton.upenn.edu/article.cfm?articleid=2417) ,
(I-PA) A brief History of Why Artists Are No Longer Making A Living Making Music
Tamblyn, I. **https://www.rootsmusic.ca/2019/03/14/a-brief-history-of-**
(https://www.rootsmusic.ca/2019/03/14/a-brief-history-of-why-artists-are-no-longer-making-a-living-making-music/?fbclid=IwAR20qggncDgsq6K1E5B7Mu2BJjzLPMVGYySt1ulBhgHoLVQIyNAqHhpxUCQ)
why-artists-are-no-longer-making-a-living-making-music/?
(https://www.rootsmusic.ca/2019/03/14/a-brief-history-of-why-artists-are-no-longer-making-a-living-making-music/?fbclid=IwAR20qggncDgsq6K1E5B7Mu2BJjzLPMVGYySt1ulBhgHoLVQIyNAqHhpxUCQ)
fbclid=IwAR20qggncDgsq6K1E5B7Mu2BJjzLPMVGYySt1ulBhgHoLVQIyNAq
(https://www.rootsmusic.ca/2019/03/14/a-brief-history-of-why-artists-are-no-longer-making-a-living-making-music/?fbclid=IwAR20qggncDgsq6K1E5B7Mu2BJjzLPMVGYySt1ulBhgHoLVQIyNAqHhpxUCQ)
(https://www.rootsmusic.ca/2019/03/14/a-brief-history-of-why-artists-are-no-
(https://www.rootsmusic.ca/2019/03/14/a-brief-history-of-why-artists-are-no-longer-making-a-living-making-music/?fbclid=IwAR20qggncDgsq6K1E5B7Mu2BJjzLPMVGYySt1ulBhgHoLVQIyNAqHhpxUCQ)
longer-making-a-living-making-music/? (https://www.rootsmusic.ca/2019/03/14/a-brief-history-of-why-artists-are-no-longer-making-a-living-making-music/?fbclid=IwAR20qggncDgsq6K1E5B7Mu2BJjzLPMVGYySt1ulBhgHoLVQIyNAqHhpxUCQ)
fbclid=IwAR20qggncDgsq6K1E5B7Mu2BJjzLPMVGYySt1ulBhgHoLVQIyNAqHhpxUC
(https://www.rootsmusic.ca/2019/03/14/a-brief-history-of-why-artists-are-no-longer-making-a-living-making-music/?fbclid=IwAR20qggncDgsq6K1E5B7Mu2BJjzLPMVGYySt1ulBhgHoLVQIyNAqHhpxUCQ)
Assigned work due Major Group Assignment and Presentation on Radiohead

Class 9 - Streaming Audio and Video, March 14: THIS CLASS WILL BE HELD REMOTELY

Mar 14/24

Overview: Streaming Audio and Video THIS CLASS WILL BE HELD REMOTELY

Class Session

Description: We have looked at the Movie Business as well as the Pre recorded Music Business from a historical perspective in weeks 7 and 8. Now we look at what is going on in these two key entertainment industries in the context of streaming

Cases

Disney and 21st Century Fox: Reshaping Disney's Strategy for the Digital Age ;and

Spotify: Face The Music, Update 2018 (k)

-In this class we will once again have two groups' present two different cases

Disney Questions

1. What were the key distribution channels for Disney before the rise of the internet and what are they today?
2. What are the strengths and weaknesses of Disney's business model?
3. What are the opportunities and threats of movie production?
4. Disney's streaming service was launched during the Covid 19 pandemic and was highly successful. How does the future look for Disney plus today?
5. Should their content strategy be to develop 100% their own content or to acquire content? Why?
6. Should they license the content they create to other streaming services, or keep it exclusive to Disney?
7. What other growth options does Disney plus have?

Spotify Questions

1. Who in your opinion is the strongest player in the music industry today? Why?
2. Does Spotify have a positive future? Why or Why not?
3. Why has Spotify been so successful?
4. What is Spotify's competitive advantage?
5. Is Spotify a platform?
6. What features are distinct for Spotify? Are these important for the user?
7. Is the freemium model right for Spotify?
8. What could Spotify do to become profitable?
9. Based on the success of music on you tube and TikTok, how does the future look for Spotify?

Readings

Briefing The Force is Strong in This Firm The Economist Dec 19, 2015
Koblin The Vanishing TV Audience NY Times, Monday May 20, 2019 P B1, B3
Prince & Greenstein, Does Original Content Help Streaming Services Attract More Subscribers? HBR Reprint H04A16 Apr.24, 2018 (Library search)
Gans Netflix and Why The Future of Streaming Looks Like Old School TV HBR Reprint H03YV6 Oct. 19, 2017 (Library search)
Gilchrest & Luca How Netflix's Content Strategy is Reshaping Movie Culture HBR Reprint H03VJ8 Aug. 31, 2017 (Library search)
Luca & McFadden , How Streaming is Changing Music Again, HBR Reprint H0391T Dec. 12, 2016 (Library search)
Seabrook, J. Will Streaming Kill Songwriting?
https://www.newyorker.com/business/currency/will-streaming-music-kill-songwriting. (https://www.newyorker.com/business/currency/will-streaming-music-kill-songwriting) Please note, this is optional, but is a great and informative read. The New Yorker website has a paywall with a limited number of free articles, so students may have difficulty accessing this content. (https://www.newyorker.com/business/currency/will-streaming-music-kill-songwriting)
Spotify's Financial
https://investors.spotify.com/financials/default.aspx (https://investors.spotify.com/financials/default.aspx)
Zhang Apple, Spotify and the Battle over Freemium HBR Reprint H0220E May 13, 2015 (Library search)

Assigned Work Due: Major Group Presentation on Disney and Spotify

Class 10 - Nightclub Marketing, March 21 THIS CLASS WILL BE HELD REMOTELY

Mar 21/24

Overview: Nightclub Marketing THIS CLASS WILL BE HELPD REMOTELY

Class Session

Description: In this session we will examine one of the most accessible forms of entertainment, the night club. This is a tough business, but one where the barriers to entry are relatively low and the rewards can be great

Assigned Readings, Cases, etc.

Case Marquee : Reinventing The Business of Nightlife 9-514-028 A (k)

1. If you were Strauss and Tepperberg, would you have approached the renovation of Marquee New York the way they did, modeling it after Marquee Las Vegas? Why or Why not? What, if anything, would you have done differently?
2. What explains the "old" Marquee's success? What were the key challenges in running that venue?
3. What explains Marquee Las Vega's success? What are they key challenges in running that venue? Will exporting this approach to New York work?
4. How would you characterize the market for DJs? What is the source of the power of the superstars in that market?Can Strauss and Tepperberg do anything to control their rising fees?
5. How does the new Marquee fit TAO Group's overall portfolio?

Readings

Christina DesMarais (http://www.inc.com/author/christina-desmarais) , Behind the Scenes of a Hot Nightclub Business **https://www.inc.com/christina-desmarais/6-ingredients-for-a-hot-night-club.html (https://www.inc.com/christina-desmarais/6-ingredients-for-a-hot-night-club.html)**

David J. Bryce, Jeffrey H. Dyer, Strategies to Crack Well Guarded Markets,Harvard Business Review, May 2007, (library search)

America's 10 Biggest Nightclubs Earned Over $550 Million In Revenue Last Year **https://www.edmtunes.com/2015/05/americas-top-10-largest-nightclubs-grossed-550-million-2014/ (https://www.edmtunes.com/2015/05/americas-top-10-largest-nightclubs-grossed-550-million-2014/)**

(2021). Bars and nightclubs in the U.S. **https://www-statista-com.ezproxy.library.yorku.ca/study/18417/bars-taverns-und-nightclubs-statista-dossier/ (https://www-statista-com.ezproxy.library.yorku.ca/study/18417/bars-taverns-und-nightclubs-statista-dossier/)**

Assigned work due Major Group Assignment and Presentation on Nightclub Marketing

Class 11 - On Broadway- Live Theatre...There's Nothing Like It, March 28

Mar 28/24

Overview: On Broadway- Live Theatre...There's Nothing Like It

Class Session

Description: This week we will cover the live theatre industry. It's perhaps the toughest nut to crack in the entertainment business, but like most high risk endeavours, the returns for success can be enormous

Assigned Readings, Cases, etc.

Cases: There are 2 of them to read in this instance

Murray, M. Hamilton Won More Than Twitter Darden Business Publishing, U of Va. Prod # UV7165 (course kit)

Elberse and Schoppe, Hamilton: An American Musical Harvard Business School July 28, 2016 Prod # 9-517-015 (course kit)

Questions:

1. What, in your opinion, are the key contributors to Hamilton's massive success?
2. Would you recommend a "cold open", or an "enhancement deal"? Why?
3. If you could have invested in a bus and truck tour of Hamilton across North America, would you have done so? Why or Why not?
4. If you could have invested in the Hamilton movie, would you have done so? Why or Why not?
5. How important was/is social media in making the show a success, and why do you think that?
6. Do you think Broadway is ready for a new Hip hop musical? Why or Why not?

Readings

Readings

(LR) 54. For Early Jersey Boys Investors, Oh What a Run
http://ezproxy.library.yorku.ca/login?url=https://www.proquest.com/docview/2463619802 (http://ezproxy.library.yorku.ca/login?url=https://www.proquest.com/docview/2463619802)

(LR) 55. Hamilton Inc. The Path to a Billion Dollar Show
http://ezproxy.library.yorku.ca/login?url=https://www.proquest.com/docview/2309984629 (http://ezproxy.library.yorku.ca/login?url=https://www.proquest.com/docview/2309984629)

(I-PA) 56. Behind the Curtain of Theatre
Investing (http://www.bbc.com/capital/story/20151216-behind-the-curtain-of-theatre-investing?ocid=global_capital_rss) http://www.bbc.com/capital/story/20151216-behind-the-curtain-of-theatreinvesting?ocid=global_capital_rss (http://www.bbc.com/capital/story/20151216-behind-the-curtain-of-theatre-investing?ocid=global_capital_rss) (http://www.bbc.com/capital/story/20151216- (http://www.bbc.com/capital/story/20151216-behind-the-curtain-of-theatre-investing?ocid=global_capital_rss) behind-the-curtain-of-theatre-investing?ocid=global_capital_rss) (http://www.bbc.com/capital/story/20151216-behind-the-curtain-of-theatre-investing?ocid=global_capital_rss)

Assigned Work Due: Major Group Assignment and Presentation on Hamilton

Class 12 - Integrated Marketing in Entertainment: Jay-Z's Decoded, April 4

Apr 4/24

Overview: Integrated Marketing in Entertainment: Jay-Z's Decoded

Class Session

Integrated marketing is a cornerstone of successful marketing efforts in business. In this session we look at the integrated marketing program behind Jay-Z's memoir, Decoded

Assigned Readings, Cases, etc.

Droga5: Launching Jay-Z's Decoded 9-513(k)

1. Is pursuing this campaign idea a smart investment for Droga5?-and for the proposed partners Random House, Roc Nation and Microsoft?
2. How can Droga5 best broker a deal between the different parties, and ensure success for each? Who really "holds the cards" in this partnership-Jay-Z and Roc Nation, or Microsoft?
3. How would you evaluate the campaign idea itself? Do you anticipate it will be effective at driving sales of Decoded and usage of Bing? Why or Why not?
4. In your view, will partnerships like these become more commonplace in the world of entertainment? What problems do these alliances address?

Readings:

Elberse, A. *Blockbusters.* Henry Holt and Company New York 2013 Chapter 7, pp.220-250 **(course kit)**

Hannah. Rohm & Crittenden: *We're All Connected, The Power of the Social Media Ecosystem. Business Horizons (2011) Volume 54 Issue 3, pp265-273* (Library Search)

STUDENT

Assigned work due

Individual Entertainment Marketing Plan

Class Participation Self Evaluation

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.*

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

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

To: Faculty Council, Schulich School of Business
From: Willow Sheremata, Strategic Management
Date: March 21, 2024
Re: Changes to the Course Title of SGMT 6410

MOTION:

That the Faculty Council approve the proposed change to the course title of SGMT 6410, International Business: Strategic Overview for Managers.

RATIONALE:

This course is currently a Strategic Management elective within the MBA program. The Strategic Management area coordinator in conjunction with the faculty member who will teach this course agreed that the prior name "International Business: Strategic Overview for Managers" was needlessly wordy and did not reflect the content of the course. The name "Global Strategy" adds clarity and better reflects the content of this course.

Schulich School of Business
York University

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:
   MBA Program

2. Responsible Unit:
   Strategic Management

3. Subject Code (Rubric) and Course Number:
   SGMT 6410

4. Credit Value:
   3.00

5. Long Course Title:
   International Business: Strategic Overview for Managers.
6. Short Course Title:
   International Business
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
	other (please specify)

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

Schulich
School of Business
York University

9. Rationale:

This course is currently a Strategic Management elective within the MBA program. The Strategic Management area coordinator in conjunction with the faculty member who will teach this course agreed that the prior name "International Business: Strategic Overview for Managers" was needlessly wordy and did not reflect the content of the course. The name "Global Strategy" adds clarity and better reflects the content of this course.

10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title SGMT 6410 3.00 ~~International Business: Strategic Overview for Managers~~	Title SGMT 6410 3.00 Global Strategy

11. Enrolment Notes:
N/A

12. Consultation:
This course is listed under the Global Retail Management specialization. This specialization is proposed to be retired.

Originator:

Willow Sheremata *Preet Aulakh*	March 17, 2024
Signature	Date
Willow Sheremata Preet Aulakh	Strategic Management
Name	Area or Specialization

Approvals:

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

Willow Sheremata	March 17, 2024
Signature	Date

Schulich School of Business
York University

Willow Sheremata	Strategic Management
Name	Area or Specialization

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

Mike Valente	March 22, 2024
Signature	Date

Mike Valente	MBA
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date

Kevin Tasa	MPC
Name of Committee Chair	Committee

To: Faculty Council, Schulich School of Business
From: Willow Sheremata, Strategic Management
Date: March 21, 2024
Re: Changes to the MBA Strategic Management Specialization

MOTION:
That the Faculty Council approve the proposed changes to the MBA Strategic Management specialization.

RATIONALE:

The intent of this proposal is to make the Strategic Management specialization more focused on strategic management. A majority of content in this specialization should be squarely focused on strategic management rather than related disciplines. The specialization has also been corrected and updated to exclude courses that are not currently offered or highly related to strategic management.

The text explaining how to specialize has been clarified to make sure students understand the number of courses from the Recommended list is a minimum.

The name for SGMT 6410 has been changed from International Business: Strategic Overview for Managers to Global Strategy to better reflect the content of the course.

We have added SUST 6250 to the Elective Courses list. This change will allow students to supplement strategic management content with highly related sustainability content.

Schulich School of Business
York University

Specialization/Stream Change Proposal Form
Schulich School of Business

The following information is required for all specialization/stream 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:

   MBA

2. Responsible Unit:

   Strategic Management

3. Type of Specialization/Stream Change(s) (indicate all that apply):

	changes to specialization/stream name
X	changes to list of required credits
X	changes to list of required courses
X	changes to list of elective courses
	retire specialization/stream
	other (please specify)

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

   Fall 2024

5. Rationale for Change:

The intent of this proposal is to make the Strategic Management specialization more focused on strategic management. A majority of content in this specialization should be squarely focused on strategic management rather than related disciplines. The specialization has also been corrected and updated to exclude courses that are not currently offered or highly related to strategic management.

The text explaining how to specialize has been clarified to make sure students understand the number of courses from the Recommended list is a minimum.

The name for SGMT 6410 has been changed from International Business: Strategic Overview for Managers to Global Strategy to better reflect the content of the course.

Schulich School of Business
York University

We have added SUST 6250 to the Elective Courses list. This change will allow students to supplement strategic management content with highly related sustainability content.

6. Proposed Specialization/Stream Information:

Existing Specialization/Stream Information (Change From):	Proposed Specialization/Stream Information (Change To):
How to Specialize 12.00 credits total[1] : • Minimum 6.00 credits of recommended courses • Up to 6.00 credits of elective courses	How to Specialize 12.00 credits total[1] : • Minimum 6.00 credits of recommended courses • Up to 6.00 credits of elective courses Students must enroll in at least two courses from the Recommended Courses list. However, they may choose to take three or four courses from the Recommended list.
Recommended Courses SGMT 6050 3.00 Mergers and Acquisitions ~~SGMT 6120 3.00 Strategic Management of Family Enterprise~~ SGMT 6130 3.00 Economic Foundations for Strategic Management SGMT 6240 3.00 Managing Strategic Alliances and Joint Ventures SGMT 6250 3.00 Strategy Execution SGMT 6410 3.00 ~~International Business: Strategic Overview for Managers~~ ~~SGMT 6490 3.00 International Negotiations: Analysis, Strategy and Practice~~ SGMT 6700 3.00 Strategic Capability Development SGMT 6720 3.00 Managing Globally: Past, Present, Future SGMT 6800 3.00 Strategic Management of Technology-Based Firms SGMT 6970 3.00 Restructuring and Turnaround Management	Recommended Courses SGMT 6050 3.00 Mergers and Acquisitions SGMT 6130 3.00 Economic Foundations for Strategic Management SGMT 6240 3.00 Managing Strategic Alliances and Joint Ventures SGMT 6250 3.00 Strategy Execution SGMT 6410 3.00 Global Strategy SGMT 6700 3.00 Strategic Capability Development SGMT 6720 3.00 Managing Globally: Past, Present, Future SGMT 6800 3.00 Strategic Management of Technology-Based Firms SGMT 6970 3.00 Restructuring and Turnaround Management
Elective Courses ECON 6210 3.00 Economic Forecasting and Analysis	Elective Courses ECON 6210 3.00 Economic Forecasting and Analysis

ENTR 6605 3.00 Entrepreneurship and New Firm Creation ~~ENTR 6625 3.00 Managing Venture Growth and Transition~~ ~~ENTR 6645 3.00 Corporate Entrepreneurship~~ ~~GMMM 6100 3.00 Strategies for Wealth Creation in the Metals & Minerals Industry~~ ~~HIMP 6130 3.00 Strategy in Healthcare~~ ~~FNSV 6970 3.00 Competitive & Organizational Strategies for Financial Services Firms~~ ~~FNSV 6985 1.50 The Canadian Life Insurance Industry and International Competition~~ ~~FNSV 6990 1.50 Enterprise Risk Management and Strategy~~ ~~HIMP 6130 3.00 Strategy in Healthcare~~ ~~MECH 6503 3.00 Disruptive & Exponential Technology Innovations*~~ ~~MGMT 6200 3.00 Business Administration and the Law~~ ~~MGMT 6300 3.00 Case Analysis and Presentation Skills~~ ~~MGMT 6700 3.00 Project Management~~ MGMT 6960 3.00 Management Consulting ~~MKTG 6650 3.00 Strategic Market Planning~~ [1] All students specializing in Strategic Management, including the MBA/JD program, must complete a minimum of 6.00 credits of recommended courses. Students may not count any credits obtained during any non-MBA Schulich Master program toward an MBA specialization.	ENTR 6605 3.00 Entrepreneurship and New Firm Creation MGMT 6960 3.00 Management Consulting SUST 6250 3.00 Integrating Sustainability Across Functions [1] All students specializing in Strategic Management, including the MBA/JD program, must complete a minimum of 6.00 credits of recommended courses. Students may not count any credits obtained during any non-MBA Schulich Master program toward an MBA specialization.

7. Consultation:

N/A

Originator:

Willow Sheremata	March 21, 2024
Signature	Date
Willow Sheremata	Strategic Management
Name	Area or Specialization

Schulich
School of Business
York University

Approvals:

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

Willow Sheremata	March 21, 2024
Signature	Date
Willow Sheremata	Strategic Management
Name	Area or Specialization

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

Mike Valente	March 22, 2024
Signature	Date
Mike Valente	MBA
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date
Kevin Tasa	MPC
Name of Committee Chair	Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Minerva Cernea, Associate Director, Prof. Development & Experiential Education Office
Date: March 18, 2024
Re: Changes to MGMT 5190 & MGMT 5290, Professional Development Hive 1 & 2

Motion: That Faculty Council approve changes to the courses MGMT 5190 & 5290.

1. Replace in "MBAt" and "MBA": with "master-level degree program"
2. Indicate that it is offered as a mandatory course to Master of Marketing and Master of Management students.

Rationale:

1. When created, the MGMT 5190 & MGMT 5290 courses were designed for the students in the MBA in Technology Leadership (MBAt). Starting with September 2024, the MGMT 5190 & MGMT 5290 courses will also be delivered to the Master of Marketing and Master of Management students. As such the need to change "MBAt" and "MBA" into "master-level degree program".

Schulich
School of Business
York University

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 Business Technology

2. Responsible Unit:
Professional Development & Experiential Education Office

3. Subject Code (Rubric) and Course Number:
MGMT 5190

4. Credit Value:
1.50

5. Long Course Title:
Professional Development Hive - Part 1

6. Short Course Title:
Professional Development Hive - Part 1

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)

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8. Effective Term/Calendar Year of Proposed Change(s):
   Academic term in which the proposed change will take effect. E.g., Winter 2025

   Fall 2024

9. Rationale:
   When created, the MGMT 5190 course were designed for the students in the MBA in Technology Leadership (MBAt). Starting with September 2024, the MGMT 5190 course will also be delivered to the Master of Marketing and Master of Management students. As such the need to change in the Brief Description included in the course outline "MBAt" into "master-level degree program".
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).

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Existing Course Information (Change From):	Proposed Course Information (Change To):
Calendar (Short) Course Description This course is designed to help ~~MBA~~ students acquire skills and knowledge that will facilitate their professional development and increase their employability. The students (1) engage in self-assessment, (2) learn to promote themselves in an efficient manner, (3) design a customised internship/job search strategy and (4) develop their intercultural competence and applied knowledge of equity, diversity, and inclusion. Expanded Course Description Is it enough to have the technical management knowledge to secure a great job and have a successful career? Research shows developing your interpersonal skills and intercultural competence predict success in career and life in general. Additionally, understanding your interests and motivators and how are these reflected in your career choices, building a detailed and well researched strategic career plan are important components in successfully managing your career as opposed to just reacting at what happens to you in your professional life. Combining this proactive approach with learning how to effectively present yourself in a very competitive and changing work environment increases your chances to faster secure a relevant internship or job. The course is designed to help ~~MBA~~ students acquire skills and knowledge that will facilitate their professional development and increased employability. The students (1) engage in self-assessment (2) learn to promote themselves in an efficient manner, (3) design a customised internship/job search strategy, and (4) develop their intercultural competence and applied knowledge of equity, diversity, and inclusion.	Calendar (Short) Course Description This course is designed to help master-level degree program students acquire skills and knowledge that will facilitate their professional development and increase their employability. The students (1) engage in self-assessment, (2) learn to promote themselves in an efficient manner, (3) design a customised internship/job search strategy and (4) develop their intercultural competence and applied knowledge of equity, diversity, and inclusion. Expanded Course Description Is it enough to have the technical management knowledge to secure a great job and have a successful career? Research shows developing your interpersonal skills and intercultural competence predict success in career and life in general. Additionally, understanding your interests and motivators and how are these reflected in your career choices, building a detailed and well researched strategic career plan are important components in successfully managing your career as opposed to just reacting at what happens to you in your professional life. Combining this proactive approach with learning how to effectively present yourself in a very competitive and changing work environment increases your chances to faster secure a relevant internship or job. The course is designed to help master-level degree program students acquire skills and knowledge that will facilitate their professional development and increased employability. The students (1) engage in self-assessment (2) learn to promote themselves in an efficient manner, (3) design a customised internship/job search strategy, and (4) develop their intercultural competence and

	applied knowledge of equity, diversity, and inclusion.
Rationale This course, by developing the knowledge, skills and competences required to increase students' employability and capacity to successfully manage their careers, is aligned with 3 of the learning expectations of the ~~*MBA in Leading Technology Enabled Organizations* (MBAt)~~ program, as represented below: ~~MBAt~~ Expectations Enrolment Notes: ~~N/A~~ Faculty Resources: Minerva Cernea and several industry experts. This course is offered in the first term of the first year of the ~~MBAt~~ program. Specializations *This course will be listed as a primary course in the ~~MBAt~~ area*	Rationale This course, by developing the knowledge, skills and competences required to increase students' employability and capacity to successfully manage their careers, is aligned with 3 of the learning expectations of the master-level degree program, as represented below: Master-level Degree Program Expectations Enrolment Notes: This course is offered to the students in the MBA in Technology Leadership, Master of Marketing and Master of Management. Faculty Resources: Minerva Cernea and several industry experts. This course is offered in the first term of the first year of the MBA in Technology Leadership, Master of Marketing and Master of Management programs. Specializations *This course will be listed as a primary course in the MBA in Technology Leadership, Master of Marketing and Master of Management area*

11. Enrolment Notes:

This course is offered to the students in the MBA in Technology Leadership, Master of Marketing and Master of Management.

12. Consultation:

Consultation done with MMKG and MMGt Programs.

Originator:

Signature

March 18, 2024

Date

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Minerva Cernea	Professional Development & Experiential Education Office
Name	Area or Specialization

Approvals:

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

	March 18, 2024
Signature	Date

Minerva Cernea	Professional Development & Experiential Education Office
Name	Area or Specialization

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

Murat Kristal	March 21, 2024
Signature	Date

Murat Kristal	MBAt
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date

Kevin Tasa	MPC
Name of Committee Chair	Committee

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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:
Master of Business Technology

2. Responsible Unit:
Professional Development & Experiential Education Office

3. Subject Code (Rubric) and Course Number:
MGMT 5290

4. Credit Value:
1.50

5. Long Course Title:
Professional Development Hive - Part 2

6. Short Course Title:
Professional Development Hive - Part 2

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)

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

9. Rationale:
   When created, the MGMT 5290 course were designed for the students in the MBA in Technology Leadership (MBAt). Starting with September 2024, the MGMT 5290 course will also be delivered to the Master of Marketing and Master of Management students. As such the need to change in the Brief Description included in the course outline "MBA" into "master-level degree program".

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).

Schulich
School of Business
York University

Existing Course Information (Change From):	Proposed Course Information (Change To):
Calendar (Short) Course Description This course builds on the knowledge acquired in Professional Development Hive – Part 1, MGMT 5190 course, continuing to help ~~MBA~~ students acquire skills and knowledge that will facilitate their professional development and increase their employability. The students (1) develop an awareness of the changing professional environment, (2) learn how to effectively interact with other professionals in different cultural and organizational settings and (3) manage the job negotiation process. Expanded Course Description: Understanding the changing professional environment, industry trends and how to successfully interact with others in the workplace is a prerequisite for professional success. In this context being aware and applying equity, diversity and inclusion principles takes a fore front. The course is designed to help ~~MBA~~ students acquire skills and knowledge that will facilitate their professional development and increased employability. This course is built on the foundations created by the Professional Development Hive – Part 1, MGMT 5190 course, and focuses on additional areas of major importance for the professional growth. The students (1) develop an awareness of the changing professional environment (2) learn how to interact with other professionals in different cultural and organizational settings using equity,	Calendar (Short) Course Description This course builds on the knowledge acquired in Professional Development Hive – Part 1, MGMT 5190 course, continuing to help master-level degree program students acquire skills and knowledge that will facilitate their professional development and increase their employability. The students (1) develop an awareness of the changing professional environment, (2) learn how to effectively interact with other professionals in different cultural and organizational settings and (3) manage the job negotiation process. Expanded Course Description: Understanding the changing professional environment, industry trends and how to successfully interact with others in the workplace is a prerequisite for professional success. In this context being aware and applying equity, diversity and inclusion principles takes a fore front. The course is designed to help master-level degree program students acquire skills and knowledge that will facilitate their professional development and increased employability. This course is built on the foundations created by the Professional Development Hive – Part 1, MGMT 5190 course, and focuses on additional areas of major importance for the professional growth. The students (1) develop an awareness of the changing professional environment (2) learn how to interact with other professionals in different cultural and

diversity and inclusion lens, and (3) understand the job negotiation process. Rationale This course, by developing the knowledge, skills and competences required to increase students' employability and capacity to successfully manage their careers, is aligned with 3 of the learning expectations of the ~~*MBA in Leading Technology Enabled Organizations* (MBAt)~~ program, as represented below: ~~MBAt~~ Expectations Enrolment Notes ~~N/A~~ Specializations *This course will be listed as a primary course in the ~~MBAt~~ area*	organizational settings using equity, diversity and inclusion lens, and (3) understand the job negotiation process. Rationale This course, by developing the knowledge, skills and competences required to increase students' employability and capacity to successfully manage their careers, is aligned with 3 of the learning expectations of the master-level degree program, as represented below: Master-level Degree Program Expectations Enrolment Notes This course is offered to the students in the MBA in Technology Leadership, Master of Marketing and Master of Management Specializations *This course will be listed as a primary course in the MBA in Technology Leadership, Master of Marketing and Master of Management areas*

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.

This course is offered to the students in the MBA in Technology Leadership, Master of Marketing and Master of Management.

12. Consultation:

Consultation done with MMKG and MMGt Programs.

Schulich School of Business
York University

Originator:

	March 18, 2024
Signature	Date
Minerva Cernea	Professional Development & Experiential Education Office
Name	Area or Specialization

Approvals:

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

	March 18, 2024
Signature	Date
Minerva Cernea	Professional Development & Experiential Education Office
Name	Area or Specialization

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

Murat Kristal	March 21, 2024
Signature	Date
Murat Kristal	MBAt
Name of Program Director	Program

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

Kevin Tasa	*March 28, 2024*
Signature	Date
Kevin Tasa	MPC
Name of Committee Chair	Committee

MGMT 5190 F 1.50: Professional Development Hive – Part 1

Course Outline
Fall 2023

Class day and time: Wednesdays, 8:30am – 11:30am
Location: SSB E112

Instructor
Dr. Minerva Cernea
(416) 736-2100 extension 77913
Seymour Schulich Building – N203C
mcernea@schulich.yorku.ca

Assistant
Chongyang Jia
(416) 736-2100 extension ~~55942~~
Seymour Schulich Building
cyjia@schulich.yorku.ca

Office hours: By Appointment

Dr. Minerva Cernea is the Associate Director, Head of the Professional Development and Experiential Education Office and she has over nine 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

This course is designed to help master-level degree program students acquire skills and knowledge that will facilitate their professional development and increase their employability. The students (1) engage in self-assessment, (2) learn to promote themselves in an efficient manner, (3) design a customized internship/job search strategy and (4) develop their intercultural competence and applied knowledge of equity, diversity, and inclusion.

Prerequisites/Corequisites/Course Exclusions: None

Contents

<Note (to be deleted): to update pg. numbers, right click on any heading below & select "Update Field">
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Course Material 4
Student Preparation for Class and Class Participation: Expectations 4
Class-by-Class Syllabus 7
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Evaluation of Assignments/Projects and Exams 12
Calculation of Course Grade 13
General Academic Policies: Grading, Academic Honesty, Accommodations and Exams 13

Course Learning Outcomes

The course has three main objectives:

(1) Increase the students' employability, focused on the development of a career strategy, an actionable career plan and of knowledge and skills required to secure a relevant internship and job. This will be achieved by providing information and coaching to support students to obtain relevant internships and jobs, both through in class sessions and the mandatory one-on-one coaching sessions for each student.

(2) Professional Development focused on the development of knowledge and skills required to operate as a manager. This will be achieved both through in class sessions, guided discussions with industry guest speakers and simulations.

(3) Increase the students' awareness of Equity, Diversity, and Inclusion (EDI), and how it impacts their and others professional development. This will be achieved by teaching the EDI concepts and how they can be applied in the classroom and in the workplace, and by: (1) discussing and including land acknowledgment to some classes, (2) ensuring the readings are authored by diverse authors, (3) using EDI case studies, and (4) bringing speakers who are diverse and come from various backgrounds.

This course is designed to develop a range of interpersonal and technical skills required for career success.

The course learning outcomes are linked to the course objectives.

Objective 1. Increase students' employability
Outcomes:
At the end of this course, students will be able to:

- Build a customized career strategy for securing a relevant internship/job
- Use job search tools to maximize their impact
- Manage and market their own personal brand in cover letters, resumes, elevator pitches and social media (LinkedIn)
- Understand and apply professional interviewing skills

Objective 2. Professional Development
Outcomes:
At the end of this course, students will be able to:

- Assess their personal strengths and preferences and develop a plan to address areas required to enhance their professional development
- Deliver effective business presentations
- Build authentic and value creating relationships that will enable employment-related opportunities

Objective 3. Increase the students' awareness of Equity, Diversity, and Inclusion
Outcomes:
At the end of this course, students will be able to:

- Understand the concepts of Equity, Diversity, Inclusion, and Intersectionality and how they are relevant to the class dynamics as well as to future workplaces
- Apply EDI concepts in their interactions in school and later in their jobs.

Organization of the Course

The course will start with a self-assessment of the student's interests, motivators, skills and organizational culture preferences. The results will aid in recommending suitable career options. The knowledge and skills the students will develop in this course will support their progress towards achieving short-term and long-term career goals. The progress is supported by three components: (1) one-on-one coaching sessions with the instructor; (2) in-course learning sessions and (3) community-based learning (Speakers).

The modules focused on providing support for securing jobs are designed to offer the students the platform to be successful. Topics include learning the job search tools and skills, understanding the job market trends, learning how to design an effective strategy for securing a relevant job.

The modules focused on Professional Development are designed to provide students with the skills and knowledge necessary to be effective managers, to instill a desire for continuous learning and personal growth, and to help develop a demeanor that is 'polished' and 'poised.' Topics include networking, building business relationships, and developing their personal brand and communication skills.

An important component of the course is the Speaker Series, which will allow the students to interact with senior level executives, including other experts from various types of organizations and organizational functions. This will provide the students with the opportunity to put into practice the knowledge and skills acquired throughout the course. The topics covered by each speaker will be career-related and include leadership styles, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers. Speakers will also present their companies, discussing industry and employment trends. Students are expected to research each speaker prior to the session and actively participate in it.

Students are also expected to participate in extra-curricular career development events throughout the course such as: networking sessions, conferences, club activities, etc.

Deliverables at a Glance

Assignment/Task	Quantity	% Weight	Total %	Author	Due Date
Class Participation	1	10%	10%	Individual	Each Class
Resume	1	10%	20%	Individual	Class 2
Cover Letter	1	10%	30%	Individual	Class 2
Interview video	1	10%	40%	Individual	Class 12
LinkedIn updated profile	1	10%	50%	Individual	Class 12
Strategic Job Search Plan	1	20%	70%	Individual	Class 8
One-on-one Coaching Sessions	2	10%	80%	Individual	Class 6, Class 12
Quiz	1	20%	100%	Individual	Class 12
			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

Method of Instruction

This course is designed using a variety of pedagogical approaches—interactive lectures, class discussions, simulations/role-playing, and individual/group presentations. There will also be several guest speakers throughout the semester who will present their experience in various topics.

Student Preparation

A key pedagogical assumption of this course is that students are co-creators of the learning experience. Students help create learning for themselves and others through active participation. This means both listening to others carefully and contributing respectfully. Class discussions are an important opportunity to practice communicating about concepts and information. Therefore, and given the method of instruction described above, *students are strongly encouraged to ask questions and actively participate during class*.

In addition, *students are expected to have read or watch all assigned materials and videos* and made an honest effort to think critically ("outside the box") prior to each class meeting to be prepared to discuss them in class.

This course demands hard work and dedication. *A minimum of 4 hours of work outside class (keeping up with reading/videos, preparing assignments, and so on) is required each week*. If you do not understand something, ask questions in class. If necessary, e-mail the instructor for an appointment. The instructor is here to help you learn.

The below assignments are required for this course:

1. Resume
2. Cover letter
3. Video interview
4. LinkedIn updated profile
5. Strategic job search plan
6. Two one-on-one coaching sessions
7. Quiz

The course is aimed to prepare the students to acquire knowledge and develop skills that will help them (a) develop a career plan and (b) secure meaningful internships/jobs. It is therefore expected that the students are regularly attending the classes.

Attendance, Etiquette and Courtesy

Students are expected to attend all classes. Failure to attend any of the classes, without prior permission from the Instructor or appropriate documentation in the event of unforeseen and extenuating circumstances (as verified by the Instructor or Student Services), will lead to a 10% reduction of grade. *If absent, students are still responsible for all contents, assignments and information covered in class*.

During class, *please focus on the lesson at hand*. Please refrain from private discussions with your classmates as this may be distracting to those around you. Share your insights and thoughts with the whole class.

In the business world, punctuality is one of key factors of success and good ethics. Therefore, *students are expected to come to class on time (up to 5 minutes before the class starts) to avoid disturbing the instructor and the rest of the class*. It is understandable that extenuating circumstances may arise. If you are unavoidably late, please be considerate and enter the class discretely. Use the rear door if one is available.

Students are also expected to turn off any cell phone, beeper and/or other electronic device during class time. This is also part of business ethics and to avoid/reduce disturbing the instructor and the rest of the class.

Overall, *please conduct yourselves with the professionalism, respectfulness and courtesy expected of students at the Schulich School of Business*. This is an important part of developing yourself as a human being.

Online Zoom teaching- in the event some classes will be on Zoom

Think of a Zoom lecture as a face-to-face meeting and conduct yourself as you would if you were all present in the same room. Zoom is our virtual classroom and therefore appropriate classroom behaviour is expected. Below are some useful tips to help ensure the session goes smoothly for all involved:

Join early, up to 5 minutes before the session start time, because the class will start on time.
Attend from a distraction-free and quiet environment (to the extent possible).
Turn-on your camera unless you are experiencing connection issues or have other concerns with having your camera being on.
Understand that your audio will be on mute upon entry. Continue to mute your audio until you want to speak and after you are done speaking.
Use "Raise Hand" feature if you want to speak. Wait for the instructor to call your name and then unmute your audio to speak.
Chat feature can also be used to ask questions or share ideas to all (not as a private message). If you would like to use the chat box, remember that it is public, and a record of the chat is kept and archived.
Please ask your question once - the instructor will address questions periodically to avoid regular disruptions to the flow of the lecture. If your question remains unanswered at the end of the lecture, please feel free to ask it again at that time.
Minimize doing other things (e.g., texting, talking to others) as it detracts from your and others learning environment. Focus and be present.

When attending the course and related events, students are expected to wear business formal attire, as part of the learning process. Please read the article in the next link to understand what is expected: http://smallbusiness.chron.com/difference-between-business-casual-business-attire-24536.html.

The students are expected to use in the course, always, English language, as a sign of respect towards the other participants in the class.

Contacting the Instructor
The best way to reach the instructor is via *e-mail*.

Disclaimer
The instructor reserves the *right to make changes* to some of the topics covered. These changes, if any, will be announced in class. Students are responsible to catch up with classmates for any announcements even (or especially) if absent from class.

Class Participation (contribution).

The class discussions are only as good as the individual contributions to them. Please note that participation is not strictly based on what you say in class and how often you speak, it is also affected by the degree to which you are visibly prepared and contribute to in-class activities.

Grades for class contribution will be allocated as follows: Attendance 50%; Personal Contributions 50%.

Class-by-Class Syllabus

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

Note: If any changes in this schedule become necessary, notifications will be posted on the course Canvas, and when changes need to be announced between classes, an email will be sent to students' email accounts, notifying them of the change.

<Sept 13> Professional Development Hive – Part 1 – Class Introduction and Professional Branding
Session 1 Prep:

- This class will provide an overview of the course, its benefits, key learnings, expectations
- Professional branding: students will learn about the Canadian resume, cover letter and elevator pitch

Read/Watch:

1. Resume Guidelines CCD: Resume Guidelines 2022 Updated August 10.pptx
2. Elevator Pitch: https://www.youtube.com/watch?v=tMSz5MZxuPM

Assignment Due Session 2:

- Email your instructor your updated resume and updated cover letter with the targeted job description
- Complete the CareerLeader™ *(For MBA/Masters);* you will receive access to CareerLeader from CCD.
- You'll receive a report outlining your skills, motivators, interests, and a list of career paths to explore. Please send your report to the Instructor before Session 2.

Please allow 2 business days for processing.

Assignment Due Session 3:

- Create and practice your Elevator Pitch; start now with your practice; be prepared to present in the class in Session 3.

<Sept 20> Professional Development Hive – Part 1 – Self-Assessment and Job Search Strategy
Session 2 Prep:

- This class will help students reflect on their personal strengths and define their career goals and mission statement from their *CareerLeader* assessment.
- Students will learn how to search for a job, locally and internationally, while understanding the cultural context and potential challenges.

Read:

Ultimate Career Guide, Chapter 2: Getting to Know Yourself
You can download Your Career Guide from:
https://issuu.com/schulichschool/docs/schulich-cdc-careerguide-web

Assignment Due Session 6:

- Schedule your first one-on-one coaching session with the Instructor starting from now until Session 6. In the first one-on-one coaching session (45min) the

CareerLeader Assessment results will be discussed as well as the career options. The students are expected to complete the CareerLeader Assessment before the coaching session, read and send the report to the Instructor.

<Sept 27> Professional Development Hive – Part 1 – Public Speaking
Session 3 Prep:

- Students will learn about culturally specific rules for effective communication – voice, tone, pitch, and body language
- Students will apply the knowledge practicing their Elevator Pitches

Watch:

1. Intonation: https://www.youtube.com/watch?v=3ZrUJ0BkBy0
2. Vocal Branding: https://www.youtube.com/watch?v=p_ylzGfHKOs
3. Vocal Executive Presence: https://www.youtube.com/watch?v=02EJ1IdC6tE

Assignment Due Session 4:

- Research the Speaker for next week (he/she will be announced by email)
- Volunteer (2 students) to welcome and introduce the Speaker
- Prepare 1 question for the Speaker (each student)

<Oct 4> Professional Development Hive – Part 1 – Speaker Series 1
Session 4 Prep:

- Speaker will cover career-related topics including leadership style, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers

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<Oct 11> Professional Development Hive – Part 1 – Networking, LinkedIn and EDII
Session 5 Prep:

- Students will learn about the importance of networking and how to obtain successful results in different cultural contexts both face-to-face and online – using LinkedIn.
- Students will learn about Equity, Diversity, Inclusion, and Intersectionality and how are these concepts applied in the classroom and in the workspace. Students will discuss their perspectives and reflect on their challenges.

Read:

1. Ultimate Career Guide, Chapter 4: Marketing Yourself: Networking
2. Ultimate Career Guide, Chapter 5: Marketing Yourself: LinkedIn
   You can download Your Career Guide from:
   https://issuu.com/schulichschool/docs/schulich-cdc-careerguide-web
3. *How to promote racial equity in the Workplace*. Harvard Business Review. (2020, November 10). Retrieved March 15, 2022, from https://hbr.org/2020/09/how-to-promote-racial-equity-in-the-workplace
   You can access at: http://researchguides.library.yorku.ca/HBR

4. Ferdman, B. M., & Deane, B. (2014). Strengthening Interpersonal Awareness and Fostering Relational Eloquence Ilene C. Wasserman. In *Diversity at work the practice of inclusion*. essay, Wiley.

Assignment Due before your second coaching session:

- Students will update their LinkedIn profile. Start now and have the profile ready before the second coaching session

---

<Oct 18> Session 6

Professional Development Hive – Part 1 – Storyboarding and Presentations

Prep:

5. Students will learn about how to create powerful presentation – Developing PowerPoint deck and Storyboards

Watch:

1. Duarte, N. (2012, December 11). *Create Slides People Will Remember*. HBR. https://hbr.org/video/2235534274001/create-slides-people-will-remember.

Assignment Due Session 11:

- Research the job target market and create a report in Word (max. 1000 words, 12-point font, single-spaced) and a PowerPoint Presentation (5 - 7 slides, min 18-point font). Incorporate what you learnt in Session 2 and 6. Send both documents to the Instructor before Session 11. Be prepared to present in the class in Session 11

<Nov 1> Session 7

Professional Development Hive – Part 1 – Interviewing 1

Prep:

- Students will learn about the different types of interviews and about how to interview effectively on the phone, video (AI or with people) or face-to-face, how to communicate with passion, sincerity and credibility; how to feel at ease and reduce their anxiety in a cross-cultural context
- Students will learn to use Quinncia, Schulich AI interviewing platform.

Read:

1. Sehgal, K., Claman, P., & Knight, R. (2019, November 6). *To Ace Your Job Interview, Get into Character and Rehearse*. Harvard Business Review. https://hbr.org/2017/04/to-ace-your-job-interview-get-into-character-and-rehearse.
   You can access at: http://researchguides.library.yorku.ca/HBR
2. Ultimate Career Guide, Chapter 6: The Art of the Interview

You can download Your Career Guide from:
https://issuu.com/schulichschool/docs/schulich-cdc-careerguide-web

Assignment Due Session 8:

- Research the Speaker for next week (the Speaker will be announced by email)
- Volunteer (2 students) to welcome and introduce the Speaker
- Prepare 1 question for the Speaker (each student)

Assignment Due Session 12:

- Schedule your second one-on-one coaching session with the Instructor starting from now until Session 12. In the second one-on-one coaching session (45min) the Instructor will review the resume, cover letter, the video interview, and the LinkedIn profile. The student will send to the Instructor, prior to the session, the updated resume, cover letter, video interview and the link to the LinkedIn profile.

Assignment Due before the second coaching session:

- Students will use Quinncia, an AI Mock Interviewing platform, available via Schulich Handshake platform, to record their video interview. Please note that you will be first asked to upload your resume, critique it, and then the AI system will generate a series of questions for the mock interview. Please send the link to your video interview to the Instructor, before the second coaching session.
  The instructions on how to set up an account can be accessed here:
  (https://yorku.joinhandshake.com/articles/18022)

<Nov 8> Session 8

Professional Development Hive – Part 1 – Speaker Series 2

Prep:

- Speaker will cover career-related topics including leadership style, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers

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<Nov 15> Session 9

Professional Development Hive – Part 1 – Interviewing 2

Prep:

- Students will learn about case interviews, when are these used and how to practice achieving results

Read:

1. McKinsey Case Interview Example:
   https://www.youtube.com/watch?v=orsNS3YG_KE
2. Bain Full Case Interview Example:
   https://www.youtube.com/watch?v=jL0DzzPLsa4

Assignment Due Session 10:

- Research the Speaker for next week (he/she will be announced by email)
- Volunteer (2 students) to welcome and introduce the Speaker
- Prepare 1 question for the Speaker (each student)

<Nov 22> Session 10

Professional Development Hive – Part 1 – Speaker Series 3

Prep:

- Speaker will cover career-related topics including leadership style, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers

Assignment Due Session 11:

- Be prepared to present your Job Search Strategy in class in Session 11

<Nov 29> Session 11

Professional Development Hive – Part 1 – Delivering Presentations

Prep:

- Students will present their Strategy Career Plan and receive feedback

Assignment Due Session 12:

- Research the Speaker for next week (The Speaker will be announced by email)
- Volunteer (2 students) to welcome and introduce the Speaker
- Prepare 1 question for the Speaker (each student)

<Dec 6> Session 12

Professional Development Hive – Part 1 – Speaker Series 4

Prep:

- Speaker will cover career-related topics including leadership style, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers

Written Assignments/Projects and Exam[s]: Descriptions

Class Participation (10% -- Individual)
Class participation is essential for the effectiveness of this course, as outlined above.

Resume (10% -- Individual)
The students will learn how to create a professional Canadian resume and they have to submit their resume, for evaluation, to the Instructor.

Cover letter (10% -- Individual)
The students will learn how to create a professional Canadian cover letter and they have to submit their cover letter, for evaluation, to the Instructor.

Interview Video (10% -- Individual)
Students will use Quinncia, an AI Mock Interviewing platform, available via Schulich Handshake platform, to record their video interview. Please note that you will be first asked to upload your resume, critique it, and then the AI system will generate a series of questions for the mock interview.
The instructions on how to set up an account can be accessed here:
(https://yorku.joinhandshake.com/articles/18022)

The students will receive feedback from the Instructor on their recorded interview in the 2nd one-on-one coaching session.

LinkedIn Updated Profile (10% -- Individual)

The students will create or update their LinkedIn profile based on the knowledge from the class session and will send the link of their LinkedIn profile to the Instructor, for approval.

Strategic Job Search Plan (20% -- Individual)
The students will create a strategic job search plan, including a rational for the targeted sectors and companies, and clear objectives and timelines, reflecting on how they will apply the course learnings. Each student will submit a written report in Word (max. 1000 words, 12-point font, single-spaced) and a PowerPoint Presentation (5 – 7 slides, min 18-point font). The students should be prepared to present the Strategic Job Search in the class.

Two one-on-one coaching sessions (10% -- Individual)
Each student has to have two one-on-one coaching sessions with the Instructor.
In the first one-on-one coaching session (30min) the CareerLeader Assessment results will be discussed as well as the career options. The students are expected to complete the CareerLeader Assessment before the coaching session, read and send the report to the Instructor.
In the second one-on-one coaching session (30min) the Instructor will review the video interview and the LinkedIn profile. The student will send to the Instructor, prior to the session the links to video interview and the LinkedIn profile.

Quiz (20% -- Individual)
At the end of the course the students will have a Quiz that will test the course knowledge.

Evaluation of Assignments/Projects and Exams

Class Participation (10% -- Individual)
Students will be evaluated primarily for demonstration of having prepared for the class, and for their efforts and the quality of their contributions during class discussions (including case discussions and interactions with speakers). A baseline grade will be given, and it can be increased depending on such efforts and contributions. Grades for class contribution will be allocated as follows: Attendance 50%; Personal Contributions 50%.

Resume (10% -- Individual)
Students will be evaluated for the quality of their updated resume and how the resume incorporates all the learned rules.

Cover letter (10% -- Individual)
Students will be evaluated for the quality of their cover letter, how the cover letter incorporates the learned rules and how it is relevant to a specific job description.

Interview Video (10% -- Individual)
Students will be evaluated on the quality of their video interview and on how the learned rules are applied.

LinkedIn Updated Profile (10% -- Individual)
Students will be evaluated based on how their LinkedIn profile is following the learned rules.

Strategic Job Search Plan (20% -- Individual)
The Strategic Job Search Plan will be graded based on the quality of the job market research, organization of thoughts, clarity and specificity of proposed objectives and timelines. Writing skills will also be evaluated, as well as the application of the PowerPoint deck and storyboard learned rules.

Two one-on-one coaching sessions (10% -- Individual)
Students will be evaluated for coming prepared to the coaching sessions.

Quiz (20% -- Individual)
At the end of the course the students will have a Quiz that will test the course knowledge.

Late Projects: Please make sure the assignments are submitted on the due date indicated on the course outline. Late assignments will be penalized.

Calculation of Course Grade

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

Numerical grades for each evaluation component will be converted to an overall percentage grade for the course using a weighted average calculation as outlined in the "*Deliverables at a Glance*" section above.

The resulting percentage grade will then be converted to a letter grade as follows:

http://gradstudies.yorku.ca/current-students/regulations/courses-grading#grading

These letter grades correspond to the Schulich's 9- value index system as discussed below.

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.

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/

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/.

MGMT 5290 F 1.50: Professional Development Hive – Part 2

Course Outline
Winter 2024

Class day and time: Wednesdays, 8:30am to 11:30am
Location: SSB E112

Instructor
Dr. Minerva Cernea
(416) 736-2100 extension 77913
Seymour Schulich Building – N214
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Office hours: By Appointment

Dr. Minerva Cernea is the Associate Director, Head of the Professional Development and Experiential Education Office and she has over nine 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

This course builds on the knowledge acquired in Professional Development Hive – Part 1, MGMT 5190 course, continuing to help master-level degree program students acquire skills and knowledge that will facilitate their professional development and increase their employability. The students (1) develop an awareness of the changing professional environment, (2) learn how to effectively interact with other professionals in different cultural and organizational settings and (3) manage the job negotiation process.

Prerequisites/Corequisites/Course Exclusions: None

Contents

<Note (to be deleted): to update pg. numbers, right click on any heading below & select "Update Field">
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Course Learning Outcomes

The course has three main objectives:

(1) Increase the students' employability, focused on the development of knowledge and skills required to secure a relevant internship and job. This will be achieved by providing information and coaching to support students to obtain relevant internships and jobs, both through in class sessions and the mandatory one-on-one coaching sessions for each student.

(2) Professional Development focused on the development of knowledge and skills required to operate as a manager. This will be achieved both through in class sessions, guided discussions with industry guest speakers and simulations.

(3) Increase the students' awareness of Equity, Diversity, and Inclusion (EDI), and how it impacts their and others professional development. This will be achieved by intentionally applying the EDI concepts in the classroom, and by: (1) discussing and including land acknowledgment to some classes, (2) ensuring the readings are authored by diverse authors, and (3) bringing speakers who are diverse and come from various backgrounds.

This course is designed to develop a range of interpersonal and technical skills required for career success.

The course learning outcomes are linked to the course objectives.

Objective 1. Increase students' employability
Outcomes:
At the end of this course, students will be able to:

- Accept and reject job offers and negotiate an employment contract
- Understand sector specific job markets trends
- Improve improvisation skills as a foundation for advanced networking and interviewing competences
- Understand and apply business etiquette rules relevant to work related networking

Objective 2. Professional Development
Outcomes:
At the end of this course, students will be able to:

- Work effectively in cross-cultural teams

- Use advanced reflection methodology in evaluating professional behaviours and events
- Better manage conflict
- Build authentic and value creating relationships that will enable employment-related opportunities

Objective 3. Increase the students' awareness of Equity, Diversity, and Inclusion
Outcomes:
At the end of this course, students will be able to:

- Understand how the concepts of Equity, Diversity, Inclusion, and Intersectionality are relevant to the class dynamics as well as to future workplaces
- Apply EDI concepts in their interactions in school and later in their jobs.

Organization of the Course

The course will start with a self-assessment of the student's interests, motivators, skills and organizational culture preferences. The results will aid in recommending suitable career options. The knowledge and skills the students will develop in this course will support their progress towards achieving short-term and long-term career goals. The progress is supported by three components: (1) one-on-one coaching sessions with the instructor; (2) in-course learning sessions and (3) community-based learning (Speakers).

The modules focused on providing support for securing jobs are designed to offer the students the platform to be successful. Topics include learning the job search tools and skills, understanding the job market trends, learning how to design an effective strategy for securing a relevant job.

The modules focused on Professional Development are designed to provide students with the skills and knowledge necessary to be effective managers, to instill a desire for continuous learning and personal growth, and to help develop a demeanor that is 'polished' and 'poised.' Topics include networking, building business relationships, and developing their personal brand and communication skills.

An important component of the course is the Speaker Series, which will allow the students to interact with senior level executives, including other experts from various types of organizations and organizational functions. This will provide the students with the opportunity to put into practice the knowledge and skills acquired throughout the course. The topics covered by each speaker will be career-related and include leadership styles, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers. Speakers will also present their companies, discussing industry and employment trends. Students are expected to research each speaker prior to the session and actively participate in it.

Students are also expected to participate in extra-curricular career development events throughout the course such as: networking sessions, conferences, club activities, etc.

Deliverables at a Glance

Assignment/Task	Quantity	% Weight	Total %	Author	Due Date
Class Participation	1	10%	10%	Individual	Each Class
Reflection Paper – Networking Experience	1	20%	30%	Individual	Class 6
Industry Job Trends - Group Presentation	1	20%	50%	Group	Class 9
Reflection Paper - Speakers	1	20%	70%	Individual	Class 12
One-on-one Coaching Sessions	2	10%	80%	Individual	Class 6, Class 12
Quiz	1	20%	100%	Individual	Class 12
			100%		

For details, see "Written Assignments/Projects: Descriptions" (p. 11) and "Evaluation …" (p. 11).

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

Method of Instruction

This course is designed using a variety of pedagogical approaches—interactive lectures, class discussions, simulations/role-playing, and individual/group presentations. There will also be several guest speakers throughout the semester who will present their experience in various topics.

Student Preparation

A key pedagogical assumption of this course is that students are co-creators of the learning experience. Students help create learning for themselves and others through active participation. This means both listening to others carefully and contributing respectfully. Class discussions are an important opportunity to practice communicating about concepts and information. Therefore, and given the method of instruction described above, *students are strongly encouraged to ask questions and actively participate during class*.

In addition, *students are expected to have read or watch all assigned materials and videos* and made an honest effort to think critically ("outside the box") prior to each class meeting to be prepared to discuss them in class.

This course demands hard work and dedication. *A minimum of 4 hours of work outside class (keeping up with reading/videos, preparing assignments, and so on) is required each week*. If you do not understand something, ask questions in class. If necessary, e-mail the instructor for an appointment. The instructor is here to help you learn.

The below assignments are required for this course:

1. Reflection Paper – Networking Experience
2. Industry Job Trends – Group Presentation
3. Reflection Paper – Speakers
4. Two one-on-one coaching sessions
5. Quiz

The course is aimed to prepare the students to acquire knowledge and develop skills that will help them (a) develop a career plan and (b) secure meaningful internships/jobs. It is therefore expected that the students are regularly attending the classes.

Attendance, Etiquette and Courtesy

Students are expected to attend all classes. Failure to attend any of the classes, without prior permission from the Instructor or appropriate documentation in the event of unforeseen and extenuating circumstances (as verified by the Instructor or Student Services), will lead to a 10% reduction of grade. *If absent, students are still responsible for all contents, assignments and information covered in class*.

During class, *please focus on the lesson at hand*. Please refrain from private discussions with your classmates as this may be distracting to those around you. Share your insights and thoughts with the whole class.

In the business world, punctuality is one of key factors of success and good ethics. Therefore, *students are expected to come to class on time (up to 5 minutes before the class starts) to avoid disturbing the instructor and the rest of the class*. It is understandable that extenuating circumstances may arise. If you are unavoidably late, please be considerate and enter the class discretely. Use the rear door if one is available.

Students are also expected to turn off any cell phone, beeper and/or other electronic device during class time. This is also part of business ethics and to avoid/reduce disturbing the instructor and the rest of the class.

Overall, *please conduct yourselves with the professionalism, respectfulness and courtesy expected of students at the Schulich School of Business*. This is an important part of developing yourself as a human being.

Online Zoom teaching- in the event some classes will be on Zoom

Think of a Zoom lecture as a face-to-face meeting and conduct yourself as you would if you were all present in the same room. Zoom is our virtual classroom and therefore appropriate classroom behaviour is expected. Below are some useful tips to help ensure the session goes smoothly for all involved:
Join early, up to 5 minutes before the session start time, because the class will start on time.
Attend from a distraction-free and quiet environment (to the extent possible).
Turn-on your camera unless you are experiencing connection issues or have other concerns with having your camera being on.
Understand that your audio will be on mute upon entry. Continue to mute your audio until you want to speak and after you are done speaking.
Use "Raise Hand" feature if you want to speak. Wait for the instructor to call your name and then unmute your audio to speak.
Chat feature can also be used to ask questions or share ideas to all (not as a private message). If you would like to use the chat box, remember that it is public, and a record of the chat is kept and archived.
Please ask your question once - the instructor will address questions periodically to avoid regular disruptions to the flow of the lecture. If your question remains unanswered at the end of the lecture, please feel free to ask it again at that time.
Minimize doing other things (e.g., texting, talking to others) as it detracts from your and others learning environment. Focus and be present.

When attending the course and related events, students are expected to wear business formal attire, as part of the learning process. Please read the article in the next link to understand what is expected: http://smallbusiness.chron.com/difference-between-business-casual-business-attire-24536.html.

The students are expected to use in the course, always, English language, as a sign of respect towards the other participants in the class.

Contacting the Instructor
The best way to reach the instructor is via *e-mail*.

Disclaimer
The instructor reserves the *right to make changes* to some of the topics covered. These changes, if any, will be announced in class. Students are responsible to catch up with classmates for any announcements even (or especially) if absent from class.

Class Participation (contribution).
The class discussions are only as good as the individual contributions to them. Please note that participation is not strictly based on what you say in class and how often you speak, it is also affected by the degree to which you are visibly prepared and contribute to in-class activities. Grades for class contribution will be allocated as follows: Attendance 50%; Personal Contributions 50%.

Class-by-Class Syllabus

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

Note: If any changes in this schedule become necessary, notifications will be posted on the course Canvas, and when changes need to be announced between classes, an email will be sent to students' email accounts, notifying them of the change.

<Jan 10> Professional Development Hive – Part 2 – Improvisation
Session 1 Prep:

- Students will learn and practice improvisation techniques, that can be applied in interviews and networking
- This session will include exercises facilitated by an improv expert

Read:

1. Gino, F. (2019, May 17). *Using Improv to Unite Your Team*. HBR. https://hbr.org/video/6038086711001/using-improv-to-unite-your-team.
2. Siliezar, J. (2019, May 2). *Improv skills can translate to social and professional skills*. Harvard Gazette. https://news.harvard.edu/gazette/story/2019/05/improv-skills-can-translate-to-social-and-professional-skills/.

Assignment Due Session 6:

- Schedule your first one-on-one coaching session with the Instructor starting from now until Session 6. In the first one-on-one coaching session (45min) you will discuss and agree on an action plan to secure your mandatory summer internship.

<Jan 17> Professional Development Hive – Part 2 – Reflection and Networking Simulation
Session 2 Prep:

- Students will learn about reflection, Ryan's 5Rs Model and how to apply it in their professional life
- The Networking Simulation will allow the students to practice and receive instant feedback on their performance with immediate applicability in business networking; the simulation will be facilitated by industry experts.

Read:

1. Ryan, M. 2013. "The Pedagogical Balancing Act: Teaching Reflection in Higher Education." *Teaching in Higher Education* 18 (2): 144–155. doi:10.1080/13562517.2012.694104

Assignment Due Session 3:

- Research the Alumni (Alumni will be announced via email)
- Prepare 1 question for the MBA Alumni Panel (each student)

<Jan 24> Professional Development Hive – Part 2 – MBA Alumni Panel 1
Session 3 Prep:

- MBA Alumni will discuss and share ideas about their professional career progression and technology career trends in their sectors
- Students will have the opportunity to practice the networking knowledge acquired in Session 1 and 2 with the members of the MBA Alumni Panel.

Assignment Due Session 4:

- Research the Speaker for next week (he/she will be announced by email)
- Volunteer (2 students) to welcome and introduce the Speaker
- Prepare 1 question for the Speaker (each student)

<Jan 31> Professional Development Hive – Part 2 – Speaker Series 1
Session 4 Prep:

- Speaker will cover career-related topics including leadership style, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers
- Two volunteer students will have the opportunity to network in a private session with the Speaker; the session will end with a networking session with the entire class.

<Feb 7> Professional Development Hive – Part 2 – Teamwork and Conflict Management
Session 5 Prep:

- Students will discuss about challenges that can appear when working in culturally diverse teams and how conflicts can be better managed;
- Students will consider the perspective on how to better integrate in a team when they are in an internship, considering the short time spent with the team;
- MBA Alumni with internships experience will be invited to the class to share their viewpoints: what worked and what should have been done differently.

Read:

- Maimon, A. (2017, April 17). *How Self-Managed Teams Can Resolve Conflict*. Harvard Business Review. https://hbr.org/2017/04/how-self-managed-teams-can-resolve-conflict.

Assignment Due Session 6:

- Research the Speaker for next week (he/she will be announced by email)
- Volunteer (2 students) to welcome and introduce the Speaker
- Prepare 1 question for the Speaker (each student)

<Feb 14> Professional Development Hive – Part 2 – Speaker Series 2
Session 6 Prep:

- Speaker will cover career-related topics including leadership style, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers
- Two volunteer students will have the opportunity to network in a private session with the Speaker; the session will end with a networking session with the entire class.

<Feb 28> Professional Development Hive – Part 2 – How to negotiate a job offer
Session 7 Prep:

- Students will learn about the job offers, what they include and how they can be successfully negotiated

Read:

1. Malhotra, D. (2020, November 20). *15 Rules for Negotiating a Job Offer*. Harvard Business Review. https://hbr.org/2014/04/15-rules-for-negotiating-a-job-offer. You can access at: http://researchguides.library.yorku.ca/HBR

2. Perna, M. C. (2021, April 13). *6 tips to negotiate your salary with confidence-and get what you're worth*. Forbes. Retrieved March 9, 2022, from https://www.forbes.com/sites/markcperna/2021/04/13/6-tips-to-negotiate-your-salary-with-confidence-and-get-what-youre-worth/?sh=1ea07cfd35f3

Assignment Due Session 8:

- Research the Speaker for next week (the Speaker will be announced by email)
- Volunteer (2 students) to welcome and introduce the Speaker
- Prepare 1 question for the Speaker (each student)

Assignment Due Session 12:

- Schedule your second one-on-one coaching session with the Instructor starting from now until Session 12. In the second one-on-one coaching session (45min) you will discuss with the Instructor your progress on securing your mandatory internship based on the action plan agreed in the first coaching session.

<Mar 6> Professional Development Hive – Part 2 – Speaker Series 3
Session 8 Prep:

- Speaker will cover career-related topics including leadership style, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers
- Two volunteer students will have the opportunity to network in a private session with the Speaker; the session will end with a networking session with the entire class.

<Mar 13> Session 9

Professional Development Hive – Part 2 – Human Resources (HR) Panel

Prep:

- Students will ask the HR Panel about trends in the job market and will learn about the recruiting process and what counts to succeed in an interview.
- Students will have the opportunity to network and build relationships with the members of the Panel with potential for internships.
- Students, in groups of 5-6 students, will present their Industry Job Trends Presentation to the HR Panel and will receive feedback.

Assignment Due Session 10:

- Research the Speaker for next week (he/she will be announced by email)
- Volunteer (2 students) to welcome and introduce the Speaker
- Prepare 1 question for the Speaker (each student)

<Mar 20> Session 10

Professional Development Hive – Part 2 – Speaker Series 4

Prep:

- Speaker will cover career-related topics including leadership style, work-life balance, personal branding, negotiation skills, and personal experiences based on their careers
- Two volunteer students will have the opportunity to network in a private session with the Speaker; the session will end with a networking session with the entire class.

Assignment Due Session 11:

- Research the Alumni (Alumni will be announced via email)
- Prepare 1 question for the MBA Alumni Panel (each student)

<Mar 27> Session 11

Professional Development Hive – Part 2 – MBA Alumni Panel 2

Prep:

- MBA Alumni will discuss and share ideas about their professional career progression and technology career trends in their sectors
- Students will have the opportunity to practice the networking knowledge acquired in Session 1 and 2 with the members of the MBA Alumni Panel.
- Students will have the opportunity to present their Strategy Career Plan and receive feedback

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<Apr 3> Session 12

Professional Development Hive – Part 2 – Business Dining Etiquette

Prep:

- Students will learn how to behave when invited for a breakfast/lunch/dinner meeting/interview/networking and they will understand how to pick up on relevant cultural cues. The session will be structured as a breakfast or lunch meeting

Written Assignments/Projects and Exam[s]: Descriptions

Class Participation (10% -- Individual)
Class participation is essential for the effectiveness of this course, as outlined above.

Reflection Paper - Networking Experience (20% -- Individual)
The students will have to attend 2 networking events, at least one of them being outside Schulich and not organized by Schulich. The students will focus on securing at least 2 coffee chats because of these 2 networking events.
The students will write a reflection paper about their networking experience during this course, discussing the 2 networking events, the 2 coffee chats, referencing the networking theories discussed in the course, the networking simulation from Session 2 and applying Ryan's 5Rs Model as discussed in Session 2.
The Reflection Paper (1000 words, 12-point font, single-spaced) will be submitted as a Word file named: "*First Name Family Name_Networking Experience Reflection Paper_Date*".

Industry Job Trends – Group Presentation (20% -- Group)
The students will be assigned in groups with similar job focus. As a group they will research the job trends in the targeted sector and geography using different primary and secondary sources. They will produce a written report in Word (2000 words, 12-point font, single-spaced) and a PowerPoint Presentation (8-10 slides, min 18-point font). The students will deliver the PowerPoint Presentation in Session 9, in front of the HR Panel.

Reflection Paper – Speakers (20% -- Individual)
The students will write a Reflection Paper (1000 words, 12-point font, single-spaced) about two of the four Speakers who came in the course. Students can choose the Speakers they want to talk about. The students will focus on Speakers' career progression, their presentation style and learned lessons. The students will apply Ryan's 5Rs Model as discussed in Session 2.

Two one-on-one coaching sessions (10% -- Individual)
Each student has to have two one-on-one coaching sessions with the Instructor.
In the first one-on-one coaching session (30min) the students will discuss with the Instructor and agree on an action plan to secure their internship or job.
In the second one-on-one coaching session (30min) the students will discuss with the Instructor the progress on securing their internship or job based on the action plan agreed in the first coaching session.

Quiz (20% -- Individual)
At the end of the course the students will have a Quiz that will test the course knowledge.

Evaluation of Assignments/Projects and Exams

Class Participation (10% -- Individual)
Students will be evaluated primarily for demonstration of having prepared for the class, and for their efforts and the quality of their contributions during class discussions (including case discussions and interactions with speakers). A baseline grade will be given, and it can be increased depending on such efforts and contributions. Grades for class contribution will be allocated as follows: Attendance 50%; Personal Contributions 50%.

Reflection Paper - Networking Experience (20% -- Individual)
Students will be evaluated for participating in the 2 networking events, with at least one outside of Schulich and not organized by Schulich, for obtaining the 2 coffee chats because of the 2 networking events, and for the quality of their Reflection Paper in terms of writing and following the Ryan's 5Rs Model as discussed in Session 2.

Industry Job Trends – Group Presentation (20% -- Group)
The Groups will be evaluated on the quality of their research, organization of thoughts, quality of writing, the quality of the PowerPoint slides and the delivery of the presentation.

Reflection Paper – Speakers (20% -- Individual)
Students will be evaluated for the quality of their Reflection Paper in terms of writing and following the Ryan's 5Rs Model as discussed in Session 2.

Two one-on-one coaching sessions (10% -- Individual)
Students will be evaluated for coming prepared to the coaching sessions.

Quiz (20% -- Individual)
At the end of the course the students will have a Quiz that will test the course knowledge.

Late Projects: Please make sure the assignments are submitted on the due date indicated on the course outline. Late assignments will be penalized.

Calculation of Course Grade

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

Numerical grades for each evaluation component will be converted to an overall percentage grade for the course using a weighted average calculation as outlined in the "*Deliverables at a Glance*" section above.

The resulting percentage grade will then be converted to a letter grade as follows:
http://gradstudies.yorku.ca/current-students/regulations/courses-grading#grading

These letter grades correspond to the Schulich's 9- value index system as discussed below.

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.

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/

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/.

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:**
   BBA Program

2. Effective Term/Calendar Year of Proposed Change(s):
Fall 2024 / Fall 2025

3. Proposed Change(s) and Rationale:
The description of and rationale for the proposed modification(s) should provide information with respect to each of the following points:

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

- Remove SB/MGMT 1030 3.00 – History of Capitalism: Structures, Agents, Artefacts as a year one core course and add a new course SB/MGMT 1035 3.00 – Global Business – Past, Present, Future, in its place.
- Effective Fall 2024

Rationale:
The new course (*MGMT 1035 – Global Business*) significantly enriches and enhances the core curriculum by introducing key aspects of global business practices. While the course retains the historical and case-based lens of the one it replaces (*MGMT 1030 - History of Capitalism*), it offers layers of contemporary global perspectives on business.
With the removal of the iBBA stream, the program is tasked with finding ways to embed Global Business into the BBA curriculum, consistent with the evolving Program Learning Outcomes. This course lays important foundations for a better understanding of global business practices by introducing its key aspects: globalization and multinational enterprises, international trade and institutions; key industries to study global dynamics such as global finance and textiles.
In sum, the course will equip all undergraduate students with a better understanding of the evolving global business environment and of global business practices. This is a component that is missing from the current curriculum.

- Replace AP/ECON 1000 3.0 -Introduction to Microeconomics and AP/ECON 1010 3.0 – Introduction to Macroeconomics with SB/ECON 1000 Microeconomics for Managers and SB/ECON 1010 Macroeconomics for Managers.
- Effective Fall 2024

Rationale:
Currently, BBA students take the core economics courses not at Schulich but at the LA&PS faculty. This gives Schulich little control over content and delivery format. Also, the School incurs payments to LA&PS for teaching Schulich students. All this while the School has an Economics Area that could teach the courses. That is why it makes sense to bring these two courses in-house. A key academic advantage of replacing the LA&PS courses with Schulich courses is that the Economics Area has designed the in-house courses in a way that better reflects the needs of business students, with a focus on managerial implications of the basics in micro- and macro-economics. This will serve Schulich BBA students better than the current delivery format.

- Remove SB/ECON 2000 Applied Macroeconomics as a core course from the BBA program
- Effective Fall 2025

Given that, as explained above, BBA students will in the future take the micro- and macro-economics course tailored to the needs of business students, a third economics course (ECON 2000) will no longer be necessary. SB/ECON 2000 was designed with the purpose of complementing the economics course that students had taken at LA&PS: adding a business and managerial perspective. With the micro- and macro-economics course offered in-house, such a third, complementary course will no longer be necessary.

- Reduce the number of core course credits required in the BBA program from 51 to 48 credits and increase the number of elective course credits required in the BBA program from 69 to 72. The Schulich elective course credits will increase from 21 to 24.
- Effective Fall 2025

This credit adjustment is the logical result of removing a core course (SB/ECON 2000).

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 proposal does not entail new course requirements.
The replacement of SB/MGMT 1030 by SB/MGMT 1035 is an enhancement of the core curriculum by strengthen global business content, consistent with the

achievement of program objectives. It does not entail new requirements for students as one course is directly replaced by the other.
The changes to the ECON courses also enhance the core curriculum by ensuring that the micro- and macro courses provide the business and managerial implications for students. There is no new requirement. Students actually take one core course less in economics, for the reasons explained above.

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.

The changes proposed here do not affect other academic units or programs.

The replacement of SB/MGMT 1030 by SB/MGMT 1035 is a matter that was discussed within relevant Areas in the School, International Business and Strategic Management.

Bringing the ECON courses 'in-house' to Schulich from the LA&PS faculty was agreed to by this faculty. Within Schulich, the changes only affect the Economics Area. Same for the retirement of ECON 2000.

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

There are no additional resources required for the proposed changes.

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

There will be no impact on the existing students existing enrolled in the program as they would have completed SB/MGMT 1030 3.0, AP/ECON 1000 3.0, AP/ECON 1010 3.0 and will complete SB/ECON 2000 as part of their degree requirements.

Students entering the program in Fall 2024 will complete SB/MGMT 1035 3.0, SB/ECON 1000 and SB/ECON 1010 as core requirements and will not have to take SB/ECON 2000.

4. Calendar Copy:
Using the following two-column format, provide a copy of the relevant graduate program/graduate diploma 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):**
	Revised curricular charts as they will appear in the Undergraduate Academic Handbook attached.

DIRECT ENTRY BBA (FALL 2024 ENTRY)

YEAR 1

FALL TERM (2024)	WINTER TERM (2025)
~~Introduction to Microeconomics~~ ~~AP/ECON 1000 3.00~~ Microeconomics for Managers SB/ECON 1000 3.0	~~Introduction to Macroeconomics~~ ~~AP/ECON 1010 3.00~~ Macroeconomics for Managers SB/ECON 1010 3.00
Introduction to Financial Accounting I SB/ACTG 2010 3.00	Introduction to Financial Accounting II SB/ACTG 2011 3.00
Introduction to Business SB/MGMT 1000 3.00	Managing Data for Business Decisions SB/OMIS 1050 3.00
~~History of Capitalism: Structures, Agents, Artefacts~~ ~~SB/MGMT 1030 3.00~~ Global Business - Past, Present, Future SB/MGMT 1035 3.00	Marketing Management SB/MKTG 1030 3.00
Non-Business Elective(s) Total of 6.00 credits	

YEAR 2

FALL TERM (2025)	WINTER TERM (2026)
Management Accounting Concepts SB/ACTG 2020 3.00	Business and Society SB/SUST 2060 3.00
Introduction to Finance SB/FINE 2000 3.00	~~Applied Macroeconomics~~ ~~SB/ECON 2000 3.00~~
Individuals and Groups in Organizations SB/ORGS 2100 3.00	Organizations and Their Environments SB/ORGS 2200 3.00
Analyzing Data for Business Decisions or Introduction to Operations SB/OMIS 2050 3.00	Supply Chain Management SB/OMIS 2010 3.00
Non-Business Elective(s) Total of 6.00 credits	

YEAR 3 (2026-2027)* and YEAR 4 (2027-2028)

**Strategic Management SB/SGMT 3000 3.00
Schulich Electives Total of ~~21.00~~ 24.00 credits
Schulich Electives or Non-Business Electives Total of 24.00 credits
Non-Business Electives Total of 12.00 credits

Please note that non-business electives at the 1000 -level, up to a maximum of 12.00 credits, are acceptable in Years 1 and 2 (i.e. the first 60.00 credits earned towards the BBA degree). Credit will not be granted for ADMS, HRM and other courses indicated on the Prohibited Course List.

In Year 3 (i.e. once students have earned 60.00 credits and before earning 90.00 credits), electives must be 2000 level or higher.

In Year 4 (i.e. over 90.00 credits), electives must be 3000 level or higher.

*Students who are planning on going on exchange in Year 3 cannot delay core courses as outlined in the curriculum for the term they are studying at Schulich.
**Must be completed in the Fall or Winter term of Year 3. This course cannot be completed on Exchange.

DELAYED-ENTRY BBA (FALL 2024 ENTRY)

YEAR 1 (2024)	
30.00 credits completed at York University to be eligible for the BBA Delayed-Entry admission requirements	
Introduction to Microeconomics AP/ECON 1000 3.00	Introduction to Macroeconomics AP/ECON 1010 3.00
Introductory Marketing SP/ADMS 2200 3.00	Introductory Statistics I SC/MATH 1131 3.00 or equivalent
Introductory Calculus Total of 6.00 credits	
Non-Business Electives Total of 12.00 credits	
Summer Term (2025)	
Introduction to Financial Accounting I (S1)* SB/ACTG 2010 3.00	Introduction to Financial Accounting II (S2)* SB/ACTG 2011 3.00
YEAR 2 (2025)	
FALL TERM	
~~History of Capitalism: Structures, Agents, Artefacts~~ ~~SB/MGMT 1030 3.0~~ Global Business - Past, Present, Future SB/MGMT 1035 3.0 or Management Accounting Concepts SB/ACTG 2020 3.00	
FALL TERM	**WINTER TERM**
Individuals and Groups in Organizations SB/ORGS 2100 3.00	Organizations and their Environments SB/ORGS 2200 3.00
Analyzing Data for Business Decisions or Introduction to Operations SB/OMIS 2050 3.00	Supply Chain Management SB/OMIS 2010 3.00
Introduction to Finance SB/FINE 2000 3.00	~~Applied Macroeconomics~~ ~~SB/ECON 2000 3.00~~
Non-Business Elective(s)** Total of 6.00 credits	
YEAR 3 (2026) and YEAR 4 (2027)	
FALL TERM	**WINTER TERM**
Strategic Management SB/SGMT 3000 3.00	
Business and Society*** SB/SUST 2060 3.00	
Schulich Electives Total of ~~21.00~~ 24.00 credits	
Schulich Elective or Non-Business Electives** Total of 21.00 credits	

In Year 3 (i.e. once students have earned 60.00 credits and before earning 90.00 credits), electives must be 2000 level or higher. Credit will not be granted for ADMS, HRM and other courses indicated on the Prohibited Course List.

In Year 4 (i.e. over 90.00 credits), electives must be 3000 level or higher.

* Delayed-Entry applicants who have submitted a satisfactory supplementary application by the March deadline will be given permission to enrol in SB/ACTG 2010 3.00 and SB/ACTG 2011 3.00 in the Summer term prior to Fall entry. Delayed-Entry applicants must achieve a minimum 'C' grade in SB/ACTG 2010 3.00 and SB/ACTG 2011 3.00 to be eligible for admission. Offers will be granted in August after a review of their Year 1 academic record including Summer courses.

** Year-level requirements apply

***Must be taken in Fall of Year 3

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Pouyan Foroughi, Assistant Professor
Date: 2024, FEB 29
Re: FINE 2000 lecture format

Motion: To transition the delivery format of lectures from in-person to blended

Rationale: the necessity for more post-lecture time to grasp concepts thoroughly, providing increased pre-class preparation time, better management of large classes, and enhanced engagement.

Schulich
School of Business
York University

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:**
   BBA Program

2. **Responsible Unit:**
   FINE

3. **Subject Code (Rubric) and Course Number:**
   FINE 2000

4. **Credit Value:**
   3.00

5. **Long Course Title:**
   Introduction to Finance

6. **Short Course Title:**
   Introduction to Finance

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 ***format of delivery change to Blended***

Schulich
School of Business
York University

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

Academic term in which the proposed change will take effect.

Fall 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.

Over the past few years, I have been fortunate to receive constructive feedback from my students regarding the need for additional time after lectures to grasp the underlying concepts more thoroughly. In the fall of 2023, in response to this feedback, I implemented a slightly different format compared to previous years by incorporating asynchronous recorded lectures alongside traditional in-person sessions. The response from students was overwhelmingly positive; they expressed a preference for this new format over the old one.

Encouraged by this feedback, I made the decision to transition the format of lectures from solely in-person to a blended approach. This change not only allows students more time to digest the material presented in recorded lectures before class but also contributes to better management of larger class sizes and enhances student engagement during class time. This shift aligns with Schulich's vision for core courses in the BBA program in 2024/2025.

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).

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York University

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title ~~Current text~~	**Title** Changes to the course syllabus are reflected in the attached updated Course Outline. Course title, description, and learning outcomes remain identical to the existing course information.

11. Enrolment Notes:

The course is one of the BBA program core courses, and most students take the course in the second year.

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:

Pouyan Foroughi	2024FEB29
Signature	Date
Pouyan Foroughi	Finance
Name	Area or Specialization

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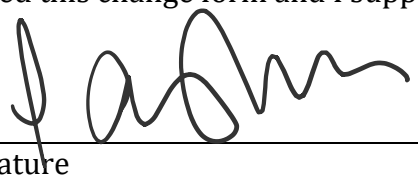
York University

Approvals:

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



Signature	February 29, 2024 Date
Pauline Shum Nolan Name	Finance Area or Specialization

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

Burkard Eberlein Signature	March 22, 2024 Date
Burkard Eberlein Name of Program Director	BBA Program Program

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

Burkard Eberlein Signature	March 22, 2024 Date
Burkard Eberlein Name of Committee Chair	BBA/iBBA Program Committee Committee

FINE 2000 3.0: Introduction to Finance

Fall 2020 – Common Course Syllabus

List of FINE 2000 sections and instructor information.

Brief Description

Students learn about investment and financing in this core course. The investment decision allocates scarce resources to projects in the organization, and involves asset valuation, capital budgeting, risk management, working capital management and performance assessment. The financing decision chooses sources of cash to finance the investment decisions and involves capital structure, financial instruments, the risk-return trade-off, financial planning and the cost of capital. Ethical considerations and management in the global context are integrated into these topics.
Course Credit Exclusion: AP/ECON 4400 3.00

Instructor Biographies

Each Instructor Bio will come from Canvas

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Course Learning Outcomes

The Learning Outcomes in this course also help you to achieve some of the overall Program Learning Goals and Outcomes for all undergraduate students in Schulich School of Business.

Program Learning Goals and Outcomes		Course Learning Outcomes	Course Assessment Item
This course helps you to achieve the following learning goals for all ASB undergraduate students:		*On successful completion of the course, you should be able to:*	*This learning outcome will be assessed in the following items:*
1	Knowledge	Understand the role of the corporate	• Online assignments

		financial manager in the business world. Understand the relationship between Corporate Finance and Accounting. Learn the basic concepts of the time value of money (TVM) and how to apply these concepts to real world financial situations. Develop the skills to be able to use the Texas BAII Plus calculate TVM and cash flow problems. Evaluate the financial feasibility of a new project using different evaluation techniques. Analyse and measure corporate performance. Understand the various forms of financing available to a company and be able to value bonds, stocks, and other financial securities	• In-class quizzes • Class contribution • Mid-term exam • Final Exam
2	Critical thinking and problem solving	Understand and solve problems involving financial mathematics; Explain the link between corporate decision making and financial markets.	• Online assignments • In-class quizzes • Mid-term exam • Final Exam
3	Oral communication	Communicate ideas in a succinct and clear manner.	• Class engagement

Deliverables at a Glance

The learning of corporate finance occurs through both a conscientious preparation for course lectures, and the active participation in classroom activities. Class lectures will consist of a review of key concepts as well as a variety of other learning activities. 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
MyFinanceLab assignments	10	2.5 each	25	Individual
Midterm	1	30	30	Individual
Participation and Contribution	1	10	10	Individual

Assignment/Task	Quantity	% Weight	Total %	Author
Final Exam	1	35	35	Individual
			100	

Course Material

Required reading for this course includes the following book[s]. It is (They are) available for purchase from the York University Bookstore (http://bookstore.blog.yorku.ca):

Textbook with MyFinanceLab

MyLab with eText

Berk / DeMarzo / Stangeland: MyLab Finance with Pearson eText for Corporate Finance, Sixth Canadian Edition

Students can purchase MyFinanceLab Access Codes through the York Bookstore or online when they register in their MyFinanceLab Course.

Students must have MyFinanceLab access to complete course assignments.
MyFinanceLab access codes and accounts are non-transferable between students.

To register for MyFinanceLab (or purchase), click on the link for your section

Enter Your Course:

1. Sign into Canvas and enter your course.
2. On your course homepage in Canvas. Select "MyLab & Mastering" on the left. Then, click on "Open MyLab & Mastering

Get Access to Your Pearson Course Content:

1. Link accounts / Create a new account
   a) "**Link accounts"** with an existing username and password.
   (If you have used a Pearson product before, you will have a Pearson account.)
   b) **"Create a new account"** if you don't have an account
3. Select an access option:
   - Enter your access code purchased from the bookstore.
   - Buy access direct from Pearson using a credit card or PayPal account.
   - Get 14-day temporary access by selecting the link near the bottom of the page.
4. From the You're Done page, select **Go to My Courses**.

Get Your Computer Ready
For the best experience, check the system requirements for your product at:
https://mlm.pearson.com/northamerica/myaccountinglab/system-requirements/index.html

MyLab 24/7 Technical Support
https://support.pearson.com/getsupport/s/contactsupport

How to Upgrade from Temporary Access:
Please Note: When upgrading **you DO NOT need to create a new account**. Just follow the steps below:

1. On your MyLab homepage, select **My Courses** on the left-hand side toolbar.
2. Highlighted in yellow you should see the option to **Upgrade**, click on it.
3. You will be asked to **Choose Your Access Option**, enter your access code from the bookstore or purchase permanent access online

For ***MyFinanceLab Support***, submit a support ticket with the Pearson Support and Services at https://support.pearson.com/getsupport/s/contactsupport.

Recommended reading: The Globe & Mail, the Economist, plus other on-line publications. We will, on occasion, review interesting articles from these publications from the previous week and examine their implications.

Every student must have a hand-held calculator that has Time Value of Money functions and you will need to be able to use your calculator effectively. Some examples of calculators you may wish to purchase include; The Texas Instruments BAII Plus (recommended model, supported in the text, and used in the CFA and CPA programs), the Sharpe EL 735 (or later) model, or the Hewlett Packard HP12, are all good choices. (Look for n, i or I/Y, PMT, PV, FV, CF, IRR and NPV functions).

The course management system being used is Canvas. It contains general information for Schulich students and information and materials specific to this course. Check it frequently. Not every source is needed for each class. Every week, you should check the Session-by-Session Syllabus below for readings and their locations.

Student Preparation for Class and Class Participation: Expectations

This course weaves together theory, concepts, teaching problems, and practical problems. It emphasizes a manager's perspective on corporate finance and is dependent on understanding the relationship between return and risk, as well as a solid foundation in the time value of money (TVM). A thorough understanding of the time value of money (TVM) includes the concepts of present value, future value, annuities, perpetuities, and uneven cash flows. Only then will you be able to understand and analyze finance decisions. The textbook and its accompanying Online Learning Centre are excellent sources of practice problems and detailed examples.

Preparation.
This course is very fast paced, technical in nature, and it requires each student to do considerable out-of-class work. It is estimated that a minimum of 8 hours of work outside of class is required every week. Even more work may be needed to prepare for assignments, midterms and exams.

You are responsible for preparing in advance for all classes, which includes doing the assigned readings and listening to the recordings posted on Canvas.

Class Participation.
Students are expected to prepare for class by completing the online MyFinanceLab assignments and reading the relevant chapter in the textbook

You are encouraged to take an active part in the class discussions by providing thoughtful, constructive, worthwhile comments, and questions and answering to in-classes quizzes.

Class-by-Class Syllabus

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

> Note: If any changes in this schedule become necessary, notifications will be posted on Canvas, and when changes need to be announced between classes, an email will be sent to students' email accounts, notifying them of the change.

Class	Coverage, Readings and Deliverables
Week 1	<u>Introduction to Corporate Finance</u> • What is Corporate Finance? Forms of Business Organizations, Goals of Financial Management, Financial Markets and Trends. <u>Time Value of Money</u> • The Interest Rate: An Exchange Rate Across Time <u>Present Value</u> • Cost-benefit analysis **Read & Listen:** • Chapter 1.1, 1.2, 1.3: Introduction to Corporate Finance and the Financial Manager • Chapter 3.1, 3.2, 3.3: Time Value of Money **Questions:** **Chapter 1:** Q15, Q16 and Q19 **Chapter 3:** Q4, Q6, Q7, Q9

Week 2	Present Value • Valuing Multiple Cash flows including Level Cash Flows: Annuities and Perpetuities **Read & Listen:** • Chapters 4.1 to 4.6: Present value **Questions:** **Chapter 4:** Q4, Q9, Q12, Q13, Q20, Q22, Q24
Week 3	Present Value • Non-Annual Intervals, Solving for Cash Flows, Internal Rate of Return, Solving for Number of Periods **Read & Listen:** • Chapters 4.7 to 4.10: Present value **Assignment Due:** **MyFinanceLab assignment#1 due by 11:59 p.m. Sunday (Sep 22)** **Questions:** **Chapter 4:** Q30, Q32, Q35, Q39, Q44, Q45
Week 4	Interest Rate • Comparing Rates: The Effects of Rates (Effective Annual Rates and Annualized Percentage Rates) • Discount Rates and Loans • The determinant of interest rates **Read & Listen:** • Chapter 5.1, 5.2, 5.3: Interest Rate **Assignment Due:** **MyFinanceLab assignment#2 due by 11:59 p.m. Sunday (Sep 29)** **Questions:** **Chapter 5:** Q6, Q10, Q13, Q18, Q20, Q21, Q29, Q32
Week 5	Bond Valuation • Bonds and Bond Valuation • Different Types of Bonds and Bond Features • Interest rate risk • Corporate Bonds **Read & Listen:**

	• Chapter 6.1 to 6.4: Valuing Bonds **Assignment Due:** **MyFinanceLab assignment#3 due by 11:59 p.m. Sunday (Oct 6)** **Questions:** **Chapter 6:** Q2, Q11, Q21, Q22, Q27, Q28
Week 6	Stock Valuation • Basics and terminology • Dividend-discount model • Estimating dividends • Share repurchase and the total pay-out model • The discounted free cash flow model • Comparable analysis-Valuation Based on Multiples **Read & Listen:** • Chapter 7: Valuing stocks **Assignment Due:** **MyFinanceLab assignment#4 due by 11:59 p.m. Sunday (Oct 20)** **Questions:** **Chapter 7:** Q2, Q6, Q21, Q25
Week 7	**Midterm exam (30%)** • In-class • Oct 23 • Details will be released later **Assignment Due:** **MyFinanceLab assignment#5 due by 11:59 p.m. Sunday (Oct 27)**

Class	**Coverage, Readings and Deliverables**
Week 8	Investment Decision Rules • Net Present Value and the NPV decision rule • Alternative decision rules • Choosing between projects • Evaluating projects with different lives • Limited resources **Read & Listen:** • Chapter 8: Investment decision rules **Assignment Due:** **MyFinanceLab assignment#6 due by 11:59 p.m. Sunday (Nov 3)**

	Questions: **Chapter 8:** Q6, Q8, Q21, Q22, Q23, Q31, Q33
Week 9	Capital Budgeting I • Capital budgeting process • Forecasting earnings • Determining incremental free cash flows **Read:** • Chapter 9.1, 9.2: Fundamentals of capital budgeting **Assignment Due:** **MyFinanceLab assignment#7 due by 11:59 p.m. Sunday (Nov 10)** **Questions:** **Chapter 9:** Q2, Q3, Q6, Q7
Week 10	Capital Budgeting II • Other effects on incremental free cash flow • The CCA Tax Shield • Analyzing the project and special cases Risk and Return • Lessons from Capital Market History (Risk and Return) • Expected Returns and Variances • Portfolios **Read & Listen:** • Chapter 9.3, 9.4, 9.5: Fundamentals of capital budgeting • Chapter 10.1 to 10.4: Capital Markets and the Pricing of Risk **Assignment Due:** **MyFinanceLab assignment#8 due by 11:59 p.m. Sunday (Nov 17)** **Questions:** **Chapter 9:** Q13, Q14 **Chapter 10:** Q1, Q6
Week 11	Risk and Return • Risk: Systematic and Unsystematic • Systematic Risk and Beta • Capital asset pricing model; The Security Market Line • Determining the Risk Premium **Read & Listen:** • Chapter 10.5 to 10.8: Capital Markets and the Pricing of Risk

	• Chapter 11.1, 11.2: Optimal Portfolio Choice and the Capital Asset Pricing Model **Assignment Due:** **MyFinanceLab assignment#9 due by 11:59 p.m. Sunday (Nov 24)** **Questions:** **Chapter 10:** Q12, Q13, Q15, Q19, Q22, Q23 **Chapter 11:** Q1, Q3, Q6, Q11

Class	**Coverage, Readings and Deliverables**
Week 12	Cost of Capital • The Cost of Equity • The Cost of Debt and Preferred Stock • The Weighted Average Cost of Capital (WACC) • Project Costs of Capital Exam Review **Read & Listen:** • Chapter 12.1-12.3, 12.5-12.8.: Estimating the Cost of Capital **Assignment Due:** **MyFinanceLab assignment#10 due by 11:59 p.m. Sunday (Dec 1)** **Questions:** **Chapter 12:** Q2, Q4, Q16, Q18, Q19, Q20, Q22, Q25, Q27

Written Assignments/Projects and Exam[s]: Descriptions

On-line Assignments (25%)

MyFinanceLab is part of your course package and is required for completing your assignments. MyFinanceLab is an online interactive tool enabling students to test and practice their knowledge gained from lectures and the text. You must register to use it. Follow the registration instructions listed on Page 4 of this course outline to activate.

There are 10 MyFinanceLab homework assignments due throughout the term which provide the opportunity for practice and assessment. The due dates are provided above, and late submissions are not accepted. You are to attempt these without anyone else's help. For any questions or issues related to MyFinanceLab, submit a support ticket with the Pearson Service center at https://support.pearson.com/getsupport/s/contactsupport.

Ensure you submit the assignment on time and that a mark is recorded for that assignment. There is no way that the instructor can allocate a grade to the assignment without fully relying on the MyFinanceLab reporting system.

Midterm Test (30%)

A midterm exam will be held mid-way through the term.

If a midterm is missed based on an acceptable (refer to Student Services guidelines) documented reason, your midterm weight will be allocated to the final examination i.e. you will write the final exam for the combined midterm and final exam weight.

Participation and Contribution (10%)

- Individual progress in the course is contingent upon the level of effort students invest in fulfilling the expected outcomes. Consequently, students' activities on Canvas and in the classroom will be monitored and assessed to gauge their engagement and performance.

Final Examination (35%)

Final Exam: The final exam will encompass material from the second half of the course. However, students are expected to be familiar with the topics from the first half that will be referenced in the second half.

The final exam may cover, at the discretion of the instructor, all readings, handout material, class discussions, lectures, and, of course, the textbook. The exam will take place during the regularly scheduled examination period following the end of the term. Students should not make plans to be away from Schulich during *any* portion of the announced examination period until the dates for their specific examinations have been announced.

Absences from exams are not acceptable. If you do miss either the midterm or final, follow the procedures found below under "**Absence from Exams**".

Evaluation of Online Assignments and Exams

Remarks on written assignments and tests:

The deadline for requesting a remark on any of these components is one week from the date that marks for that component are first made available to the class. To request a remark, students must email a written request specifically identifying where marks were missed, a copy of their assignment, and a copy of the marker's comments. These will then be forwarded to the marker for a second review.

For the online assignments, midterm and final exam, students will be evaluated on their written answers in terms of correctness and quality relative to the standard solution. Partial marks will

sometimes be available depending on the nature of the question. Orderly neat work is expected, and the marker is not expected to sort through your response to find the correct answer.

Online MyFinanceLab Assignments
Your mark for each assignment will automatically be calculated using the Pearson platform. Students will have **ONE attempt** to complete each Lab at home. The credentials for access will be made available on Canvas. Late submissions will not be accepted.

Calculation of Course Grade

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

- All the assignments and exam marks will be multiplied by weighting of each deliverable as outlined in the 'Deliverables at a glance' section above. The average mark will then be converted into a letter grade.
- The letter grade corresponds to Schulich's 9-value index system as discussed in the section below.

The Schulich School does not have a standard policy for translating percentages into letter grades.

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, **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/.

Absence from Exams - Deferred Standing Request

If you miss the midterm or Final exam, please follow the steps outlined below:

1) **Within 24 hours** of missing a **mid-term or final examination**, students must **contact Student & Enrolment Services** at 416-736-5303 or via email at undergrad@schulich.yorku.ca.

2) Students must also **contact their course instructor within 24 hours** of the missed exam.

3) **Formal documentation** (e.g. Attending Physician's Statement, death certificate, letter from counselor, etc.) regarding the reason for missing the final exam must be **submitted to Student & Enrolment Services within 48 hours** of missing the final exam, via this Deferred Standing Request and file upload. **Retain all originals in the event they are required for hard-copy submission**

Please review Schulich's policy on deferred standing in your Handbook, available in your MySchulich portal.

Note that the grade you earn is determined by your demonstrated performance in the course and not a function of the grade that you need or want.

Quick Reference: Summary of Classes, Activities and Deliverables

All readings refer to ***Corporate Finance*** by Berk and Demarzo, 6th Canadian Edition, published by Pearson, 2024

Class	Coverage	Textbook Chapters	Graded Deliverable
1	Introduction to Corporate Finance, Time Value of Money	Ch. 1: Introduction to Finance Ch. 3.1-3.3: Time Value of Money	
2	Present value calculation	Ch. 4: Present value	
3	Present value calculation and interest rate	Ch. 4: Present value	Online assignment #1 due Sun., Sep 22
4	Present value calculation and interest rate	Ch. 5.1, 5.2, 5.3: Interest Rate	Online assignment #2 due Sun., Sep 29
5	Bond Valuation	Ch. 6.1-6.4: Valuing bonds	Online assignment #3 due Sun., Oct 6
6	Stock Valuations	Ch. 7: Valuing stocks	Online assignment #4 due Sun., Oct 20
7	**Midterm exam in class**		Online assignment #5 due Sun., Oct 27
8	Investment Decision Rules	Ch. 8: Investment decision rules	Online assignment #6 due Sun., Nov 3
9	Capital Budgeting I	Ch. 9.1, 9.2: Fundamentals of capital budgeting	Online assignment #7 due Sun., Nov 10
10	Capital Budgeting II Risk & Return	Ch. 9.3, 9.4, 9.5: Fundamentals of capital budgeting Ch. 10.1-10.4: Capital Markets and the Pricing of Risk	Online assignment #8 due Sun., Nov 17
11	Risk & Return Capital Asset Pricing Model	Ch. 10.5-10.8: Capital Markets and the Pricing of Risk Ch. 11.1, 11.2: Optimal Portfolio Choice and the Capital Asset Pricing Model	Online assignment #9 due Sun., Nov 24
12	Cost of Capital & Exam Review	Ch. 12.1-12.3, 12.5-12.8: Estimating the Cost of Capital	Online assignment #10 due Sun., Dec 1
	Common Final Examination held during the		

Program Learning Goals and Outcomes		Course Learning Outcomes	Course Assessment Item
This course helps you to achieve the following learning goals for all ASB undergraduate students:		*On successful completion of the course, you should be able to:*	*This learning outcome will be assessed in the following items:*
1	Knowledge	Understand the role of the corporate financial manager in the business world. Understand the relationship between Corporate Finance and Accounting. Learn the basic concepts of the time value of money (TVM) and how to apply these concepts to real world financial situations. Develop the skills to be able to use the Texas BAII Plus calculate TVM and cash flow problems. Evaluate the financial feasibility of a new project using different evaluation techniques. Analyse and measure corporate performance. Understand the various forms of financing available to a company and be able to value bonds, stocks, and other financial securities	• Online assignments • In-class quizzes • Class contribution • Mid-term exam • Final Exam
2	Critical thinking and problem solving	Understand and solve problems involving financial mathematics; Explain the link between corporate decision making and financial markets.	• Online assignments • In-class quizzes • Group project • Mid-term exam • Final Exam
3	Oral communication	Communicate ideas in a succinct and clear manner.	• Class engagement

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Ruodan Shao, Associate Professor, Organization Studies area
Date: Feb. 12, 2024
Re: Add a blended delivery mode format to existing modes of ORGS 2100: Individuals and Groups in Organizations

Motion: For Faculty Council to approve the addition of a blended delivery mode format for ORGS 2100: Individuals and Groups in Organizations

Rationale: ORGS 2100 was delivered remotely (via Zoom) in the fall of 2020 through fall 2021 semesters and had 15% remote delivery in fall 2022. During this time, the instructors teaching this course gained insight into the unique value of online delivery and better approaches to using in-person class time. For example, in fall 2020 we developed online videos conveying certain course concepts and we found that the videos were particularly helpful for students to learn and study on their own time. Since then, we developed new content, class exercises, and resources, including a series of valuable e-learning modules. The student feedback on these new delivery modes has been very positive in general. As a result of our learnings over the past few years, we discovered that different course content may be better delivered to students through different delivery modes.

As a result, we believe we can better teach ORGS 2100 by combining in-person instruction with asynchronous (e-learning modules) delivery. As such, ORGS 2100 has been delivered using this blended delivery mode in the fall of 2023 as a pilot project. This newly introduced blended delivery mode has enabled us to utilize the most appropriate and effective delivery modes for different types of course content and class activities. Each week, students complete an asynchronous e-learning module and also attend an in-person class session. Certain organizational behavior concepts and theories, that are best suited for self-guided learning, are delivered through the asynchronous online e-learning modules. During in-class time, students participate in activities best suited for in-person, such as group-based discussions, games, case analysis, and activities. We have received positive feedback from students regarding this new delivery mode.

In summary, taking the course forward in a blended[1] format will allow us to provide the students with the best possible learning experience and to further improve our teaching quality and support our exploration of new teaching approaches facilitated by the development of classroom technology. This proposed change also responds to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York".

[1] Blended learning is defined by York University as follows: "At least a third of the course will be delivered online and a third face-to-face, the remaining third may be any combination of online or face-to-face."

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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 BBA Program

2. **Responsible Unit:**
   ORGS

3. **Subject Code (Rubric) and Course Number:**
   ORGS 2100

4. **Credit Value:**
   3.00

5. **Long Course Title:**
   Individuals and Groups in Organizations

6. **Short Course Title:**
   Individuals and Groups in Organizations

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):** Add a blended delivery mode format to the course

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York University

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

9. Rationale:

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10. Proposed Course Information:

n/a

Existing Course Information (Change From):	Proposed Course Information (Change To):
	Changes to the course syllabus are reflected in the attached updated syllabus. Course title, description, and learning outcomes remain identical to the existing course information.

11. Enrolment Notes:

n/a

12. Consultation:

n/a

Originator:

Signature	Date
Name	Area or Specialization

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Approvals:

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

Ruodan Shao	Feb. 20, 2024
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.

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA Program
Name of Program Director	Program

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

last updated: Jan 04 6:01pm EST.

Schulich School of Business

ORGS2100 F2023 **CREDITS: 3.00**

ORGS 2100 A - INDIVIDUALS AND GROUPS IN ORGANIZATIONS

N/A N/A N/A

Office Hours

By appointment

INSTRUCTOR

Brent Lyons

Stephen Friedman

ADMIN

Tammy Tam

ttam@schulich.yorku.ca

416.736.2100 Ext. 55096

N303B SSB

Tutorial 1 - Mon 5:30-7:00pm - Room N109 - Stephen Friedman

Tutorial 2 - Mon 7:00-8:30pm - Room N109 - Stephen Friedman

Tutorial 3 - Wed 5:30-7:00pm - Room N105 - Stephen Friedman

Tutorial 4 - Wed 5:30-7:00pm - Room N109 - Brent Lyons

Tutorial 5 - Fri 11:30am-1:00pm - Room N109 - Brent Lyons

Tutorial 6 - Fri 1:00-2:30pm - Room N109 - Brent Lyons

STEPHEN FRIEDMAN BIOGRAPHY

Stephen Friedman (He/Him)

🎓 I am an Adjunct Professor of Organizational Studies and a Senior Faculty of Executive Education, at The Schulich School of Business, York University in Toronto.

💻 I teach and design live and virtual graduate and undergraduate courses in Organizational Behaviour (OB), Complexity Science, Interpersonal Management, Team Development, Human Resource Management and Leadership in the BBA, MBA, Masters of Marketing, Masters of Management and Masters of Artificial Intelligence programs.

🖥️ I also teach executive education courses in areas such as Performance Management, Human Resource Management, Complexity, Problem Solving, and Leadership, across a range of industries.

🙏 I am boundlessly grateful that I get to work with students just starting out, those who are growing through graduate studies and other leaders, managers and professionals, looking to learn about OB, at various stages of their careers.

🌎 The 1000's of stories from students', leaders', managers' and other professionals' decisions, and challenges gives me a desire to create a world where business is a source for income and for social good. Where business and personal development go hand in hand.

👨🏻‍💻 I also spend time (on and off) as a writer, with my work appearing in several publications and platforms, like @Medium, and @theconversationcanada.

🧠 My own favorite thinking and writing topics are those that build bridges between personal/leadership development, psychology/cognitive science and business.

📚 I like to read, write and learn about progressive perspectives on how to integrate and think about organizational behaviour, behavioural economics, complexity science, systems thinking, social skills development, career development, social psychology, human resource management, inclusion, mental health and some others.

BRENT LYONS BIOGRAPHY

Brent Lyons (he/him) is an Associate Professor of Organization Studies at the Schulich School of Business and the York Research Chair in Stigmatization and Social Identity. His research involves the study of stigma in organizations and how individuals with stigmatized social identities, such as disabled employees and sexual minority employees, navigate their work and interpersonal relationships to reduce consequences of stigmatization. Brent is passionate about teaching organizational behaviour, and inspiring students to feel a similar level of passion. Organizational behaviour integrates ideas from psychology, sociology, management, and economics, and involves reflection on one's own and others' experiences. Brent feels that learning about organizational behaviour best occurs through dialogue between students and instructors, and Brent is committed to creating a safe environment where everyone feels comfortable sharing their points of view. Brent has taught ORGS 2100 for the last six years and has previously served as the course coordinator. The course has gone through a significant transformation this year, even though the core goals of the course have remained the same, and Brent is excited to experience the newest iteration of ORGS 2100 with you.

BRIEF DESCRIPTION

An introduction to the study of organizations from a behavioural science frame of reference. The course emphasizes psychological and social approaches to understanding basic aspects of human behaviour in all types of work organizations. Topics include: the motivation to work, individual differences, leadership and authority, and group dynamics. As well as lectures and discussions, the course emphasizes experiential learning through the use of exercises, demonstrations, cases and projects. This course is not available for iBBA credit. Previously offered as: SB/OBIR 1000 3.00, SB/OBIR 2000 3.00. Note: Not open to iBBA students for credit. BBA students who commenced the program in Fall 2009 must complete SB/ORGS 1000 3.00 in the Winter term of their 1st year of study. Course credit exclusions: SB/INTL 1300 3.00, HH/PSYC 3570 3.00.

COURSE LEARNING OUTCOMES

The purpose of this course is to introduce students to the field of Micro Organizational Behaviour (OB). OB is an essential part of business education because of its vital contribution to effective management. Students after graduation often tell us that while they thought OB was “just common sense,” they realized in their first positions that managing individuals and teams is one of the most challenging aspects of their work. By the completion of the course, students will have increased their self-awareness and will better understand their own and others identities, cultural experiences, personality, values and attitudes while developing an understanding of motivation, decision-making, communications and power. All this will contribute to you becoming a more effective leader. At the end of this course, students are expected to have:

- developed more awareness of themselves (e.g., personal values and ethical beliefs, social and cultural identities, communication, learning and leadership styles);

- enhanced skills in areas such as an ability to work in diverse teams, managing people and relationships in the workplace and critical thinking (assessment and judgement); and
- knowledge of the theories of organizational behaviour and their applications

COURSE MATERIAL

Material for the course has been organized in three main locations. Not every source is needed for each week. Every week you must refer to Canvas for what you need to do to prepare for the online learning module and the in-person tutorial. You are expected to complete these requirements each week. The online module, text readings and any other material posted on Canvas must be completed before the in-person tutorial each week.

TEXTBOOK

Colquitt, Lepine, Wesson and Gellatly, "Organizational Behaviour: Improving Performance and Commitment in the Workplace", 2022, Fifth Canadian Edition, McGraw-Hill Education LLC.

The textbook is available for purchase electronically.

https://www.bookstore.yorku.ca/site_textbook_landing_page.asp

Section registration link: https://connect.mheducation.com/class/s-friedman_b-lyons_orgs2100a_tutorials123456

CANVAS

It contains general information for Schulich students and information specific to this course. It also contains links to articles, videos, cases, exercises and any other required course material. This includes links to the required online modules.

ONLINE LEARNING MODULES

Each week, you will be required to complete one learning module covering the topic for that week's class prior to the in-person tutorial. The links to the modules are in Canvas.

The modules will contain an overall review of the topics for that week as well as videos, readings, activities and/or other materials. There will be quizzes included in each module which you are required to complete. The module compliments the text and other assigned readings for that week. The text should be read alongside the modules. **You will need to have covered all assigned materials before completing the module quiz.**

The modules, textbook and other materials on Canvas are all required materials for this course. Your instructor will be tracking your engagement with the learning modules.

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Course Engagement 15%			
👍🏼 Course Engagement Overview omited from final grade.		0%	
In-Class (Tutorial) Engagement		0.1%	
Canvas Discussions		0.02%	
Online E-Learning Modules and Quizzes		0.06%	
Module One: Introduction to "Individuals and Groups in Organizations" ORGS 2100 omited from final grade.		1.23%	
Module One: Introduction to "Individuals and Groups in Organizations" ORGS 2100* omited from final grade.		1.23%	
Module Three: Job Satisfaction and Motivation omited from final grade.		1.23%	
Module Two: Job Performance and Organizational Commitment omited from final grade.		1.23%	
Roll Call Attendance omited from final grade.		1.23%	
Job Analysis Assignment Template and Submission omited from final grade.		0%	
Module 4: Personality, Abilities, and Diversity omited from final grade.		1.23%	
Module 5: Groups, Teams & Communication omited from final grade.		1.23%	
Module 7: Learning and Decision-Making omited from final grade.		1.23%	
Module 8: Power, Influence and Conflict omited from final grade.		1.23%	
Module 9: Leadership omited from final grade.		1.23%	
Module 10: Organizational Culture omited from final grade.		1.23%	

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Module 11: Workplace Stress and Mental Health omited from final grade.		1.23%	
Group Project 15%			
Group Project - Written Component		15%	
Group Presentation 15%			
📽️ Submit Video Presentation Here - One person per group		15%	
Midterm Examination 26.5%			
Midterm Examination		26.5%	
Final Examination 26.5%			
Final Examination		26.5%	Tue Dec 19, 2023 at 09:00am EST
Research Participation 2%			
Research Participation		2%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

👍🏼 Course Engagement Overview

Engagement is worth 15 points (15%) toward your final grade.

Engagement will be determined based on three components of the course:

- Your participation in weekly in-person tutorials (8%) - 🛑 **Details here. (https://schulich.instructure.com/courses/9521/assignments/93146)**
- Your participation in weekly online Canvas discussions (2%) - 🛑 **Details here. (https://schulich.instructure.com/courses/9521/assignments/96469)**
- Your successful completion of online modules and the accompanying quizzes each week. Successful completion of the quizzes is 60%. **You must complete these prior to each class** (5%)

In-Class (Tutorial) Engagement

In-Class (Tutorial) Engagement (8%)

We will meet in-person each week for 1.5 hours during our scheduled tutorial time. We will use this time to discuss the weekly course concepts, the assigned case reading, participate in activities together, and answer questions about weekly material. During this meeting time you will have a chance to participate by engaging in class discussion, activities, or asking questions.

You will receive a participation grade for each class meeting based on the following scale: -1, 0, 1, and 2.

-1	You are disrespectful, your comments are irrelevant to the topic or are distracting, or take away from the gist of the meeting.
0	You do not attend the tutorial.
1	You attend the tutorial.
2	Your comments show that you have thought about the course material in a thoughtful way. You participate in tutorial discussions and activities.

Halfway through the course your instructor will provide all students with individual feedback on their tutorial engagement with a specific point score.

You will only receive an Engagement grade for 8 of the 10 weekly tutorial (not including exams or weeks when no tutorial is scheduled). That is, your Engagement grade will be based on your highest 8 grades of the 10 tutorials OR 8 weeks if you choose to not participate for 2 weeks.

🛑 Important Additional Information Regarding In-Class (Tutorial) Engagement

🛑 Please be sure to post a ***recent photo*** of yourself on Canvas (you can do this on your Canvas under Account → Settings) and be sure to ALWAYS have your **name tent on display** in class.

🛑 If you cannot/do not do these two things, your instructor **cannot guarantee an accurate grade** for this graded component.

🛑 Note that your Canvas photos will be kept **strictly confidential** and will only be used for identification and engagement evaluation by the instructor. They will **NEVER be shared or distributed** or shared outside of this course's Canvas.

Canvas Discussions

Canvas Discussion Requirements

Each week the course instructor will post a question the Discussion forum on Canvas based on the topic of that week.

Your task is to respond with one thoughtful comment to the question **or** two peer responses. You should respond directly to the question(s) posed.

This component will be graded as pass/fail based on the requirements below. Meeting all requirements will give you full marks!

Students are responsible for **either an initial opening post (a response to the instructors question) for each week of material OR two peer responses for each week.**

These are due prior to class for that week.

If students actively read the assigned readings, they will be able to participate in the discussions in a meaningful way.

Students may use course materials, personal and professional experiences, and external research.

ALL POSTS must be free of discriminatory, belligerent, mean-spirited, comments. Any racist, sexist or other discriminatory comments will not be tolerated and will result in a 'fail' for this component.

Initial "question response" requirements: What should my posts look like?

1. All posts are due prior to the class for that week. For example, class two posts are due prior to the tutorial session for class two.

2. A typical post should be approximately 100-200 words, but quality counts over quantity. If your post is too long, your peers will not read it!

3. Posts should represent the student's original thoughts.

4. These are not mini-essays, nor must they conform to a formal academic style. They should however cite any external sources referenced, including the course

materials so others also can read more. Don't make things up.

5. The best posts add material for others to explore!

6. Posts should be free of spelling errors, be grammatically correct, and written in complete sentences.

7. Posts AND peer responses should never be "I agree" or "I do not agree". Our agreement is not important. They must add value.

Peer response requirements: What does a peer response look like?

1. All posts are due prior to the class for that week. For example, class two posts are due prior to the tutorial session for class two.

2. Peer responses can be whatever length the student feels is necessary to make his or her point and while they may be conversational in tone, they should also be free of spelling errors, grammatically correct, written in complete sentences, and contain full words (no unnecessary abbreviations, acronyms, etc.) and as little conjecture as possible.

3. Though constructive feedback is encouraged, students should demonstrate sensitivity to, respect for, and appreciation of their peers' work and perspectives, even if they disagree.

4. Each student will bring their unique voice to each conversation; there is inherent value in differing viewpoints and perspectives.

5. All posts must be free of discriminatory, belligerent, mean-spirited, comments. Any racist, sexist, or other discriminatory comments will not be tolerated.

6. Posts AND peer responses should never be "I agree" or "I do not agree". Our agreement is not important. They must add value.

General Guidelines are:

FAIL	-	Your comment is disrespectful, irrelevant to the

	topic, or takes away from the gist of the discussion. - You do not make a comment - You make a comment but it does not demonstrate thought. e.g. Your comment may be brief without showing that you have thought about the question or relevant course concepts.
PASS	- Your comment is relevant, topical, or factual and thoughtfully engages with course concepts.

Online E-Learning Modules and Quizzes

Your successful completion of online modules and the accompanying quizzes each week. Successful completion of the quizzes is 60%. You must complete these before class each week along with the text readings. (5%)

Module One: Introduction to "Individuals and Groups in Organizations" ORGS 2100

Module One: Introduction to "Individuals and Groups in Organizations" ORGS 2100*

Module Three: Job Satisfaction and Motivation

Module Two: Job Performance and Organizational Commitment

Roll Call Attendance

Job Analysis Assignment Template and Submission

The template for your group to use in class is **HERE!! (https://schulich.instructure.com/courses/9521/files/1063242?wrap=1)** ↓ **(https://schulich.instructure.com/courses/9521/files/1063242/download?download_frd=1)**

At the end of class, one person from each group needs to submit it on Canvas.

Module 4: Personality, Abilities, and Diversity

Module 5: Groups, Teams & Communication

Module 7: Learning and Decision-Making

Module 8: Power, Influence and Conflict

Module 9: Leadership

Module 10: Organizational Culture

Module 11: Workplace Stress and Mental Health

Group Project - Written Component

In randomly assigned groups, students will write a structured paper that is an OB analysis of a film clip.

🛑 Full assignment details, including a required analysis form, **can be found here (https://schulich.instructure.com/courses/9521/pages/group-film-analysis-form-and-project-details)** .

The paper will be submitted on Canvas and screened using Turnitin.com

Grading rubric for the group project can be found in Canvas.

Due Date: At the beginning of last tutorial (Tutorial 12).

🎥 Submit Video Presentation Here - One person per group

🎥 In groups, students will pre-record a 5-minute video based on their group project ("OB Analysis") paper.

🕛 **Your group video presentation is due at midnight, the night prior to your last tutorial session. Be sure to check the specific due date/time for your tutorial number in the Canvas for your section.**

⛔ **There will be a penalty for late submissions at one letter grade per day late (e.g. A to a B+).**

👀 **All students will watch and grade three other groups' videos during the last tutorial session.**

✅ **Group presentation grades will be based on peer grading via "TEAMMATES". Failure to complete the evaluations will result in a penalty.**

📩 **You will receive an e-mail with a link to the "TEAMMATES" evaluations at the start of your turorial session.**

🛑 **Details for which three videos your group will view and evaluate will be posted at the start of your class.**

Midterm Examination

Students will write an in-tutorial midterm exam during Week 6 (26.5%).

The midterm will consist of multiple choice questions and will test you on your ability to apply the correct course concepts covered in classes 1 through 5 inclusive.

Final Examination

Due Date: Tue Dec 19, 2023 at 09:00am EST

Students will write a final exam on Tuesday, Dec 19.

The final will consist of multiple choice questions and will test you on your ability to apply the correct course concepts covered in classes 6 through 10 inclusive (26.5%).

Research Participation

Knowledge production through research is an important part of the work that is done in a university. Participation in research is a key way of learning more about organizational behaviour and the methods and theory behind knowledge production. As part of your class participation grade, you will have the option of participating in two separate research studies (1% each, for a total of 2%). Each study will take between 30 minutes to 1 hour. Although each study will be different, generally speaking you will be asked to consider certain ideas, complete questionnaires, and perhaps undertake a task of some kind. All data will be completely confidential and will not be shared with anyone outside the research team. All research is reviewed and approved by York's Human Participants Research Committee (HPRC) for ethics and procedural compliance. The research studies will be conducted in two separate data collection periods. You can only participate once in each data collection period. More information about each study opportunity will be announced during the course of the term. Participation is voluntary and you may choose not to participate in any of the research for any reason. Alternatively, you can still earn the credit by writing a short paper (one paper per study), single sided, on any ORGS related topic.

GRADING SCHEME

A+	100%	to	89.5%
A	< 89.5%	to	79.5%
B+	< 79.5%	to	74.5%
B	< 74.5%	to	69.5%
C+	< 69.5%	to	64.5%
C	< 64.5%	to	59.5%
D+	< 59.5%	to	54.5%
D	< 54.5%	to	49.5%
F	< 49.5%	to	0%

CLASS-BY-CLASS SYLLABUS

🛑 Important Course Information

- 📔 Textbook Registration
- 👨🏽‍💻 Information About Weekly E-Learning Modules
- 👍🏽 Course Engagement Overview
- 📚 Crucial Resources for This Class
- 👉 Note on Academic Integrity & The Use of AI Technologies in This Class
- 👩🏻👨🏻👨🏼 !? Pre-and-Post Class Course Content Question Thing-a-majig

Class 1 - Introduction to Organizational Behaviour (Sep 6-12)

Overview: Introduction to Organizational Behaviour

Class 1 - Sep 6-12

Topic: Introduction to Organizational Behaviour

In this first week, we'll introduce the framework that will guide us through the term. We'll begin with an introduction to organizational behaviour and why it is so important for business, and familiarize you with some of the key topics that make up the course. We'll then discuss course expectations and evaluation.

Assigned Readings

1. Read the course outline
2. Chapter 1: What is Organizational Behaviour? (textbook)

Assigned work

1. Participate in the "Week 1 Discussion"

2. Complete “Week 1 Online Learning Module”

Class 2 - Job Performance and Organizational Commitment (Sep 13-19)

Overview: Job Performance and Organizational Commitment

Class 2 - Sep 13-19

Topic: Job Performance and Organizational Commitment

In this second week we'll focus on job performance and organizational commitment as outcomes of organizational behaviour. We'll look at different ways through which to performance can be defined, and the different types of commitment employees exhibit in organizations. In tutorial, we'll complete a job analysis to understand how organizations go about defining performance, and discuss the implications of a job analysis for organizational behaviour.

Assigned Readings

1. Chapter 2: Job Performance (textbook)
2. Chapter 3: Organizational Commitment (textbook)

Assigned work

1. Participate in the "Week 2 Discussion"
2. Complete “Week 2 Online Learning Module”

Tutorial slides: **Job Performance Tutorial Activities.pptx (https://schulich.instructure.com/courses/9521/files/1064416?wrap=1)** **(https://schulich.instructure.com/courses/9521/files/1064416/download?download_frd=1)**

Class 3 - Job Satisfaction and Motivation (Sep 20-26)

Overview: Job Satisfaction and Motivation

Class 3 - Sep 20-26

Topic: Job Satisfaction and Motivation

In our third week, we'll examine job satisfaction and motivation and their effect on our two outcomes of job performance and organizational commitment. We'll specifically examine the main predictors of job satisfaction using job characteristics theory and explore what predictors seem more or less relevant for job satisfaction and motivation.

Assigned Readings

1. Chapter 5: Job Satisfaction
2. Chapter 7: Motivation

Assigned work

1. Participate in the "Week 3 Discussion"
2. Complete “Week 3 Online Learning Module”

Tutorial slides: **Job Satisfaction and Motivation Tutorial activities.pptx (https://schulich.instructure.com/courses/9521/files/1064412?wrap=1)** **(https://schulich.instructure.com/courses/9521/files/1064412/download?download_frd=1)**

Class 4 - Personality, Ability, and Diversity (Sep 27-Oct 3)

Overview: Personality, Ability, and Diversity

Class 4 - Sep 27-Oct 3

Topic: Personality, Ability, and Diversity

This week, we’ll learn a more about ourselves by reflecting on our individual differences (i.e., personalities and abilities) and differences between us in terms of social and cultural identities (i.e., diversity). We'll examine how personalities, abilities, and diversity are relevant for understanding OB, job performance and organization commitment.

Assigned Reading

1. Read Chapter 4: Personality, Cultural Values, and Ability (textbook)

Assigned work

1. Participate in the "Week 4 Discussion"
2. Complete “Week 4 Online Learning Module”
3. Before the tutorial, complete and determine your score on the HEXACO personality inventory: **http://hexaco.org/hexaco-online (http://hexaco.org/hexaco-online)**
4. Before the tutorial, read Privilege 101

Tutorial activities: **Personality and diversity activities.pptx (https://schulich.instructure.com/courses/9521/files/1068610?wrap=1)** **(https://schulich.instructure.com/courses/9521/files/1068610/download?download_frd=1)**

Class 5 - Groups, Teams and Communication (Oct 4-17)

Overview: Groups, Teams and Communication

Class 5 - Oct 4-17

No Class on Oct 9 (Thanksgiving) and Oct 10-13 (Co-curricular Day)

Topic: Groups, Teams and Communication

This week, we'll look at groups, teams, and communication, topics that I'm sure you have experience with, given that group work represents and will continue to represent a substantial part of your course work at Schulich. We'll examine the role of communication in teams, including what makes communication effective and ineffective.

Assigned Readings

1. Read Chapter 10: Communication
2. Read Chapter 11: Teams Characteristics and Processes (textbook)

Assigned work

1. Participate in the "Week 5 Discussion"
2. Complete "Week 5 Online Learning Module"

Tutorial 5 slides: **Teams and communication activities.pptx**
(https://schulich.instructure.com/courses/9521/files/1072820?wrap=1)
(https://schulich.instructure.com/courses/9521/files/1072820/download?download_frd=1)

Class 6 - Mid-Term Exam (Oct 18-24)

Overview: Mid-Term Exam

Class 6 - Oct 18-24

Mid-Term Exam

Students will write an in-tutorial midterm exam during Week 6. The midterm will consist of multiple choice questions and will test you on your ability to apply the correct course concepts covered in classes 1 through 5 inclusive

Class 7 - Learning and Decision-Making (Oct 25-31)

Overview: Learning and Decision-Making

Class 7 - Oct 25-31

Topic: Learning and Decision-Making

This week, we'll dive into learning and decision-making. We'll explore how learning takes place in organizations. Although the definition of decision-making – the process of generating and choosing from a set of alternatives to solve a problem – seems obvious, a flurry of psychological research has shown that decision makers tend to fall victim to certain heuristics or biases that make decision-making very irrational. In tutorial, we'll examine puzzles and how our biases play a role in solving them.

Assigned Reading

1. Read: Chapter 9: Learning and Decision-Making (textbook)

Assigned work

1. Participate in the "Week 7 Discussion"
2. Complete "Week 7 Online Learning Module"

Tutorial slides: **Tutorial 7 Learning & Decision making.pdf (https://schulich.instructure.com/courses/9521/files/1092410?wrap=1)** **(https://schulich.instructure.com/courses/9521/files/1092410/download?download_frd=1)**

Class 8 - Power, Influence and Conflict (Nov 1-7)

Overview: Power, Influence and Conflict

Class 8 - Nov 1-7

Topic: Power, Influence and Conflict

This week, we'll look at power, influence and conflict. We will examine differed forms of power and how you can gain certain forms of power throughout your career. We will also examine differed influence tactics and their effectiveness. We'll conclude with a discussion of conflict management styles and how they affect relationships at work.

Assigned Reading

1. Read Chapter 12: Power, Influence and (textbook)

Assigned work

1. Participate in the "Week 8 Discussion"
2. Complete "Week 8 Online Learning Module"
3. Before tutorial, complete and self-score this free and adapted version of the Thomas Kilman Conflict Mode Instrument (TKI): **https://quizterra.com/en/test-tomasa-kak-vy-vedete-seba-v-konfliktnoj-situacii-2 (https://quizterra.com/en/test-tomasa-kak-vy-vedete-seba-v-konfliktnoj-situacii-2)**

Tutorial slides: **Tutorial 8 Power & Conflict.pdf (https://schulich.instructure.com/courses/9521/files/1094216?wrap=1) (https://schulich.instructure.com/courses/9521/files/1094216/download?download_frd=1)**

Class 9 - Leadership Styles and Behaviour (Nov 8-14)

Overview: Leadership Styles and Behaviour

Class 9 - Nov 8-14

Topic: Leadership Styles and Behaviour

We'll take a close look at leadership as an important factor in our understanding of how and why individuals and teams behave differently in organizations. When we think of the term leadership, we oftentimes go beyond business organizations and consider leaders in politics, sports, non-profits, and the military. That said, much of what explains effective leadership is consistent across these domains.

Assigned Reading

Chapter 13: Leadership Styles and Behaviours. (textbook)

Assigned work

1. Participate in the "Week 9 Discussion"
2. Complete "Week 9 Online Learning Module"
3. Before the tutorial, read Dealing with Difficult People: **https://stephenfriedman.medium.com/how-to-deal-with-difficult-people-start-with-**

ourselves-82fbde3d98cf (https://stephenfriedman.medium.com/how-to-deal-with-difficult-people-start-with-ourselves-82fbde3d98cf)

Tutorial 9 slides: **Tutorial 9 Leadership tutorial activities.pdf (https://schulich.instructure.com/courses/9521/files/1101416?wrap=1) (https://schulich.instructure.com/courses/9521/files/1101416/download?download_frd=1)**

Class 10 - Organizational Culture (Nov 15-21)

Overview: Organizational Culture

Class 10 - Nov 15-21

Topic: Organizational Culture

This week we'll be looking at a characteristic of the broader organization, organizational culture. Organizational culture, or the shared assumptions, values, and beliefs that show employees what is appropriate and inappropriate behavior, plays a very important role in behavior in organizations. We'll discuss your experiences with different ways organizational culture manifests, and the important role of organizational culture in organizational behaviour.

Assigned Reading

1. Chapter 15 (textbook)

Assigned work

1. Participate in the "Week 10 Discussion"
2. Complete "Week 10 Online Learning Module"
3. Before the tutorial, read the following news story about an organization (oil rig) changing its culture: **https://qz.com/89580/how-an-oil-rig-shed-its-macho-culture-and-became-safer-and-more-productive (https://qz.com/89580/how-an-oil-rig-shed-its-macho-culture-and-became-safer-and-more-productive)**

Note:

The Presentation Video is due to be uploaded at Midnight, the night before the final tutorial.

Class 11 - Stress and Mental Health (Nov 22-28)

Overview: Stress and Mental Health

Class 11 - Nov 22-28

Topic: Stress and Mental Health

This week we'll be looking at stress and mental health. We'll discuss your experiences as it relates to stress and mental health in the lead up to the exam and then extend the discussion to the workplace by exploring your role as employees facing stress and mental health challenges and as future managers in helping employees cope with stress and mental health.

Assigned Reading

1. Chapter 6: Stress (textbook)

Assigned work

1. Participate in the "Week 11 Discussion"
2. Complete "Week 11 Online Learning Module"

Tutorial ppt slides: **Tutorial 11 Stress and Mental Health.pdf (https://schulich.instructure.com/courses/9521/files/1133491?wrap=1)** **(https://schulich.instructure.com/courses/9521/files/1133491/download?download_frd=1)**

Class 12 - Final Project (Nov 29-Dec 5)

Overview: Final Project

Class 12 - Nov 29-Dec 5)

Assigned work due

Final Project

Final Exam - Dec 19, 9am

Final Examination

STUDENT 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 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/ (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.*

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

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

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Ruodan Shao, Associate Professor, Organization Studies area
Date: Feb. 12, 2024
Re: Add a blended delivery mode format to existing modes of ORGS 2200: Organizations and their Environments

Motion: For Faculty Council to approve the addition of a blended delivery mode format for ORGS 2200: Organizations and their Environments

Rationale: ORGS 2200 was delivered remotely (via Zoom) in the winter of 2021 through winter 2022 semesters and had 15% remote delivery in Winter 2023. During this time, the instructors teaching this course gained insight into the unique value of online delivery and approaches to engaging the students. We also developed new content, class exercises, and resources. The student feedback on the new delivery modes was positive in general. During this process, we also have discovered that different course content may be better delivered to students through different delivery modes.

Given that we have developed our knowledge and skills in the past few years in course delivery using various delivery modes and the positive and enthusiastic feedback from our students, we believe we can better teach ORGS 2200 by combining in-person instruction with asynchronous (e-learning modules) delivery. We believe this blended delivery mode will enable us to utilize the most appropriate and effective delivery modes for different types of course content and class activities. For example, certain concepts and theories, that are best suited for self-guided learning, will be delivered through the asynchronous online e-learning modules. During in-class time, students will participate in activities best suited for in-person, such as group-based discussions, games, case analysis, and activities.

In summary, taking the course forward in a blended[1] format will allow us to provide the students with the best possible learning experience and to further improve our teaching quality and support our exploration of new teaching approaches facilitated by the development of classroom technology. This proposed change also responds to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York".

[1] Blended learning is defined by York University as follows: "At least a third of the course will be delivered online and a third face-to-face, the remaining third may be any combination of online or face-to-face."

Schulich School of Business
York University

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:**
   ORGS

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

4. **Credit Value:**
   3.00

5. **Long Course Title:**
   Organizations and their Environments

6. **Short Course Title:**
   Organizations and their Environments

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):** Add a blended delivery mode format to the course

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

Fall 2024

9. Rationale:

ORGS 2200 was delivered remotely (via Zoom) in the winter of 2021 through winter 2022 semesters and had 15% remote delivery in Winter 2023. During this time, the instructors teaching this course gained insight into the unique value of online delivery and approaches to engaging the students. We also developed new content, class exercises, and resources. The student feedback on the new delivery modes was positive in general. During this process, we also have discovered that different course content may be better delivered to students through different delivery modes.

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10. Proposed Course Information:

n/a

Existing Course Information (Change From):	Proposed Course Information (Change To):
	Changes to the course syllabus are reflected in the attached updated syllabus. Course title, description, and learning outcomes remain identical to the existing course information.

11. Enrolment Notes:

n/a

12. Consultation:

n/a

Originator:

Signature	Date
Name	Area or Specialization

Schulich
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York University

Approvals:

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

Ruodan Shao	Feb. 20, 2024
Signature	Date
	ORGS
Ruodan Shao	
Name	Area or Specialization

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA Program
Name of Program Director	Program

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Schulich School of Business

INSTRUCTOR

Stephen Friedman

sfriedman@schulich.yorku.ca

ADMIN

Tammy Tam

ttam@schulich.yorku.ca

416.736.2100 Ext. 55096

N303B SSB

ORGS2200 W2025 CREDITS: 3.00

ORGS 2200 - ORGANIZATIONS AND THEIR ENVIRONMENTS

TIME TBD SSB TBD

Office Hours

By appointment

BRIEF DESCRIPTION

This core course focuses on three complementary perspectives on organizations, which are simultaneously strategic designs constructed to achieve strategic goals, political arena in which interests and power shape action and outcomes, and cultural systems of shared meanings and identities. Class sessions will develop and use these perspectives at a variety of levels, from teams in organizations to complex cross-border environments. Previously offered as: SB/OBIR 2010/3010 3.00. Note: Not open to iBBA students for credit. Prerequisites: SB/ORGS 1000 3.00, SB/ORGS 2100 3.00 or equivalent. Course Credit Exclusion: SB/INTL 1300 3.00, SB/INTL 2300 3.00.

COURSE LEARNING OUTCOMES

The purpose of this course is to enhance your ability to take effective action in complex organizational settings. It will provide you with the analytic tools needed to analyze, manage, and lead the organizations of the future, and give you the opportunity to test and enhance your ability to use those tools through cases, simulations, and class discussions. This course is therefore a demanding one that stretches from individual skills to the analysis of complex international organizations and their environments. It emphasizes the importance of the organizational context in influencing which individual styles and skills are effective.

The ability to act with skill and creativity in organizations begins with the development of multiple perspectives on organizations. As you are no doubt aware, humans habitually settle into fixed perspectives, unchallenged mental models of how the world works, unconscious filters of what we pay attention to and what we ignore. These habits offer powerful economies of thought: without them, the simplest task of picking a face out in a crowd or listening to the radio while driving would be impossible. But they impose costs as well. They can lock us into a single view of the world that may not be best, that is surely incomplete, that will become outdated, and that is resistant to change. Creativity involves trading off economy of thought for innovation of thought. It requires the discipline of interpreting what we see and hear in organizations from multiple standpoints.

The basic framework of the course centers on three complementary perspectives on organizations: the strategic design, political, and cultural. Organizations are simultaneously social systems that have been constructed to achieve strategic. goals (Strategic Designs), political arenas in which interests and power shape action and outcomes (Political Systems), and shared systems of meaning and identity (Cultural Systems).

The course provides you with a grounding in each of these analytical frameworks and the tools for action that each provides, and then integrates across these analyses to help you identify effective actions. Then we spend some time using these frameworks at a variety of levels, from teams in organizations to corporate social responsibility, and in a variety of contexts, in order for you to hone your ability to act effectively in a diversity of organizational contexts.

Upon course completion, students should be able to:

1. Analyze organizations as strategic designs, as political systems, and as cultural systems.
2. Apply these frameworks to identify root causes of organizational and managerial problems.
3. Develop effective action steps based on your analysis to address those problems.
4. Examine your own behavior and beliefs about organizations to contrast, debate, and integrate them with the theories and observations of others, and to learn from the experience and perspectives of classmates.
5. Enhance the capacity to read critically the business press and assess its assumptions and analyses.

COURSE MATERIAL

Material for the course has been organized in three main locations. Not every source is needed for each week. Every week you must refer to Canvas for what you need to do to prepare for the online learning module and the in-person tutorial. You are expected to complete these requirements each week. The online module, text readings and any other material posted on Canvas must be completed before the in-person tutorial each week

TEXTBOOK

Michael Lewis, Liar's Poker: Rising through the Wreckage on Wall Street Penguin

Publisher, 2010

The textbook is available for purchase from the York University Bookstore.

https://www.bookstore.yorku.ca/ (https://www.bookstore.yorku.ca/)

CANVAS

It contains general information for Schulich students and information specific to this course. It also contains links to articles, videos, cases, exercises and any other required course material. This includes links to the required online modules.

ONLINE LEARNING MODULES

Each week, you will be required to complete one learning module covering the topic for that week's class prior to the in-person tutorial. The links to the modules are in Canvas.

The modules will contain an overall review of the topics for that week as well as videos, readings, activities and/or other materials. There will be quizzes included in each module which you are required to complete. The module compliments the text and other assigned readings for that week. The text should be read alongside the modules. **You will need to have covered all assigned materials before completing the module quiz.**

The modules, required Canvas readings and other Canvas materials are all required materials for this course. Your instructor will be tracking your engagement with the learning modules.

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Class Contribution and Engagement 15%			
In-Class (Tutorial) Engagement		13%	
Canvas Discussions		2%	
Online E-Learning Modules and Quizzes 10%		10%	
Module One: **Introduction to 2200 & Understanding Organizations**			
Module Two: **Organizations as Strategic Designs**			
Module Three: **Organization as Political Systems**			
Module Four: **Organizations as Cultures**			
Module Five: **Integrating The Lenses/Lenses on Groups**			
Module Seven: **Managing Complex Environments**			
Module Eight: **Managing Teams and Diversity**			
Module Nine: **Organizational Change**			
Module Ten: **Changing Organizations and Changing Society**			
In-Class Team Project: The Three Lenses Slide Deck 17%			
In Class Team Project: The Three Lenses Slide Deck		17%	Due Class 6
Major Team Project: Organizational Analysis Project 30%			
Organizational Analysis - Written Submission		18%	Due Class 12
Organizational Analysis - Team Video Presentations		12%	Due Class 12
Final In-Class Exam		**33%**	
Final In-Class Exam		33%	Class 10

ASSIGNMENTS: DESCRIPTIONS

Class Contribution and Engagement is worth 15 points (15%) toward your final grade.

It will be determined based on two components of the course:

(1) Your participation in weekly in-person tutorials (13%)

(2) Your participation in weekly online Canvas discussions (2%)

Online E-Learning Modules and Quizzes 10%

Your successful completion of online modules and the accompanying quizzes each week. Successful completion of the quizzes is 60%. This component is worth 10%

Tutorials (13%)

We will meet in-person each week for 1.5 hours during our scheduled tutorial time. We will use this time to discuss the weekly course concepts, the assigned case reading, participate in activities together, and answer questions about weekly material. During this meeting time you will have a chance to participate by engaging in class discussion, activities, or asking questions. You will receive a participation grade for each class meeting based on the following scale: -1, 0, 1, and 2.

-1	You are disrespectful, your comments are irrelevant to the topic or are distracting, or take away from the gist of the meeting.
0	You do not attend the tutorial.
1	You attend the tutorial.
2	Your comments show that you have thought about the course material in a thoughtful way. You participate in tutorial discussions and activities.

Halfway through the course your instructor will provide all students with individual feedback on their tutorial engagement with a specific point score.

You will only receive an Engagement grade for 8 of the 10 weekly tutorial (not including exams or weeks when no tutorial is scheduled). That is, your Engagement grade will be based on your highest 8 grades of the 10 tutorials OR 8 weeks if you choose to not participate for 2 weeks.

Canvas Discussions (2%)

Each week the course instructor will post a question the Discussion forum on Canvas based on the topic of that week. Your task is to respond with one thoughtful comment to the question. You can respond directly to the question(s) posed. Each of your comments will be graded as PASS or FAIL. Grades will be based on the following scheme.

FAIL	– Your comment is disrespectful, irrelevant to the topic, or takes away from the gist of the discussion. – You do not make a comment – You make a comment but it does not demonstrate thought. e.g. Your comment may be brief without showing that you have thought about the question or relevant course concepts.
PASS	– Your comment is relevant, topical, or factual and thoughtfully engages with course concepts.

In-Class Group Project

The Three Lenses Slide Deck

🛑 NOTE: You will be given time in class to complete the assignment.

🎙️ Project details will be announced on Canvas in class 6!

1. The purpose of this assignment is to help you apply the three lenses (strategic design, political, and cultural) to an organization in the news.
2. You are expected to find 1-2 recent articles (within the past month) from a reputable news source (major newspaper or news network).

TO PREPARE

✓ Find your group's articles NOW (recommended by class 3)

✓ See details about using research resources here.

✓ Keep up with class readings etc.

3. For the deliverable, your team will develop and submit a deck report of no more than 10 slides. The purpose of the deck report is to provide detailed analysis, data, information, and findings that illustrate the highlights of your analysis. Details will be provided in class 6.

Assignment Details:

In-Class Team Project Due: The Three Lenses Slide Deck

The purpose of this assignment is to help you apply the three lenses (strategic design, political, and cultural) to an organization in the news. You are expected to find 1-2 recent articles (within the past month) from a reputable news source (major newspaper or news network). Please be sure to provide a complete reference to your sources.

For the deliverable, your team will submit a deck report of no more than 10 slides. The purpose of the deck report is to provide detailed analysis, data, information, and findings that illustrate the highlights of your analysis.

It is your opportunity to show, in some detail, substantial evidence of the application of the three lenses to the organization you choose, conducted by team for this project. The deck report should communicate a clear and compelling story through a set of slides.

PROJECT DETAILS

1. Provide a brief and coherent summary of the article(s). What are the core issues being discussed?
2. Apply each of the three perspectives to the article(s). What are the key takeaways about the chosen organization from the point of view of each of the three lenses?
3. Explain the group's assessment as to which of the three lenses was most useful in illuminating the key issues faced by the organization covered in the article(s)

Specifications and suggestions:

Required components:

1. Contents and Objectives (typically 1-2 slides)

- Table of contents
- Glossary of key terms and abbreviations (if applicable)
- Objectives: Identify the key objectives of the report deck

2. **Executive Summary** (1 slide)

- ***Pro Tip***: *The executive summary is a critical piece of the report. It creates a "first impression" and may be your only chance to attract the reader's attention. If the first impression is negative, many readers will simply not read on. We advise that you start your executive summary with a strong statement. If you can engage the readers with the first sentence or paragraph, you will have positively primed them to accept your arguments, as well as interested them enough to read on. We also advise that you write the executive summary after you have finished the rest of the deck to make sure it captures the key messages.*

- **Suggested contents**:
  - A tight description of the article(s)
  - A brief definition of the core issues, problems, and opportunities you want to highlight and analyze
  - A brief description of the key takeaways about the chosen organization from the point of view of each of the three lenses
  - An short articulation of which of the three lenses was most useful

3. Body of Report

- Presents a logical storyline and evidence of the substantial application of each lens, with a strong emphasis on specific insights gained
- Successful teams often adopt a simple approach that:
  - provides a relevant yet general overview of the context (the articles)
  - describes the most relevant components of each lens, including the key insights gained;
  - presents a clear set of take aways;
  - and clearly and succinctly outlines which of the three lenses was most useful as well as how and why.

4. Bibliography

- Includes all sources that you consulted to produce your deck report

Length of report:
The deck report is limited to 10 slides or pages. Be selective with the content. The storyline and the relevance and impact of the material are far more important than the quantity or completeness. Base your decisions on what to include on the needs of the audience, not the team's desire to show off its work.

Format:
Font, line-spacing, slide design, etc. are your choices to make. Make them with the goal of producing a polished, professional-looking deck. In general, a deck report includes a lot more detail than typical presentation slides and extensively uses text, graphs, figures, data, and citations. The use of visuals should help the reader understand the content, not "beautify" the deck. In other words, don't include graphs, figures, or pictures that add no value.

Your Deliverable
Please submit your deck report on Canvas in pdf or ppt/pptx format within the allotted time **IN CLASS.**
See details about using research resources here.

Grading rubric for the group project can be found in Canvas.

Major Group Project

ORGS 2200 Organizational Analysis Team Project Guide and Instructions

The **Organizational Analysis Team Project** will be carried out in teams of 5-7 students and has the following goals:

- To practice your skills in analyzing an organization,
- To demonstrate capability in using the three perspectives (the organization as a strategic design, a political system, and a culture) to analyze an organization;
- Be able to use the course material as part of your toolkit for developing creative ideas for enhancing organizational effectiveness.
- To learn something about an organization (or a kind of organization) that matters to you.

The final written report will take one particular issue or challenge and examine it using the frameworks—the three perspectives of strategic design, political system, and culture—for the analysis. The groups will select an organization, conduct an analysis based on the three perspectives, and prepare a final written report to be submitted on the final day of classes. It should be between 4000 and 5000 words (which amounts to 16–20 double-spaced pages in length).

The organization ***should not*** be one that is part of York University (with 10 teams per section in ORGS2200 each year, the danger of overloading university organizations is too great to make this feasible). There are a number of potential resources you can consult to identify interesting organizations, such as *Canadian Business* magazine's annual listing of Canada's fastest-growing companies. You can select a company, a non-profit organization, an arts organization, a hospital, or a professional services organization.

If your organization is a very large one (in the past, for example, some teams have chosen P&G or one of the major banks), it will make the analysis easier if you identify a particular part of the organization (a division, department, or office) that new employees might reasonably expect to join. The report can then look at how this part of the organization fits into the whole, in terms of its strategic design, its political system, and its culture (and sub-cultures, if appropriate). Think, for example, of an organization like Weta Digital in our discussion of the production of *The Lord of the Rings*. It would be easier to do an analysis from the viewpoint of one division or even one work unit (one of the engineering groups, for example, or from the Visual Effects group in Weta Digital) than to attempt to portray the organization as a whole. It would be up to the group to decide how to allocate the analysis between the company-wide and the division-specific analysis, and much would depend on how important your group decided it would be for a new entrant to understand the "big picture" as well as a specific part of it.

When you pick a sub-unit in the organization (for example, a department in a hospital or a branch in a bank), try to look "up" at least one level (and two if you can) and "down" one level. The roles and responsibilities/groupings within your chosen unit and the political and cultural sub-groups and behaviours you observe will be strongly influenced by the larger organizational context beyond your chosen unit of focus, and you need to be aware of these effects.

Analyzing the Organization
An important part of conducting the project is library research to find information about your chosen organization and/or its industry from databases and the business press. To prepare you for this,

Although the organization's website is often the best starting point, *remember that you are using the website as a source of data for the analysis, and you should not rely blindly on what the website tells you*. **You are expected to use at least 10 *distinctive* resources (distinctive means not 10 different pages from the same website).** These may include periodicals drawn from library databases, reputable news sources, and magazines. The information should cover not only the specific organization you chose but also the organization's industry.

Be sure to check out this link for help with research and using the library resources.
Your assignment is an analysis, not a data dump; do not simply copy material off the website. And treat the information you find there analytically; do not assume that normative claims (such as "we always provide excellent service") are matters of fact rather than self-presentation. In addition, there are several databases that can provide leads to business press articles about the organization. The research librarians at Schulich's Bronfman Business Library are an excellent resource and are very helpful.
Do not rely only on a standard Google search to find information about your organization!

Be sure to check out this link for help with research and using the library resources.
You will need to interview **at least two** members of the organization (current members, or at least one current member and those who have recently left it). It can be very useful to make initial contact with your informants early in the research process to ensure that the person is indeed willing to talk with you. *You will find the informants most useful, however, after you have done the preliminary work with the publicly available materials about the organization.*

Doing an interview requires following the York University research protocols by filling out "Form B" and submitting it to your instructor via Canvas. **A template can be found HERE Download HERE.**

The purpose of the assignment is to develop your ability to use the conceptual frameworks and tools from the course. Your analysis should use the "three lenses" to provide insight into the strategic design, the political system, and the culture of the organization you have chosen. But remember: you are writing an analysis, not a handbook produced by the company to put the best possible face on the organization. You need to think critically, in the social science sense rather than in the usual sense of looking for the bad side, which you don't want to do either.

You need to approach the organization analytically. Consult the list of questions from Class 6 (Integrating the Perspectives) and use them to guide your analysis—but remember, these are guides to an analysis, not guides to questionnaire construction! You cannot easily use these as interview questions! The issue of how to frame interview questions is discussed in "Preparing the Interview" later in this guide.

The most pragmatic way to organize your analysis is to tackle each perspective separately and then integrate them by looking at a particular issue or challenge. This enables you to look at how the different aspects of the organization—the strategic design, the political, and the cultural—reinforce or undercut each other. In the course of your research, however, you may find that you want to try another issue around which to integrate the perspectives.

Approaching an Organization
HERE Download HEREyou will find a sample and a short explanation of the project and what you need from the organization and the person you are contacting. It is useful to keep the initial explanation fairly brief. You do not need to go into detail about the three perspectives unless they ask about the frameworks you are using. You might also want to avoid using the labels we use in class, especially since "political" has rather negative connotations in some organizations. One way to explain (if they ask) is that you are expected to look at the organization's structure, its culture, and how decisions get made.

York University requires all students and faculty engaged in research involving human subjects (such as an interview) to obtain "informed consent" by getting their signature on something called "Form B" which you can find **HERE Download HERE**. In Zoom interviews, you have an alternative by simply asking for their consent (a sample script for doing this can be found **HERE Download HERE**). This is now a well-established practice in conducting social science research, and you can explain to your interviewees that getting this informed consent is a university requirement.

Preparing for the Interview
Sometimes your informant wants to have a list of specific questions before the interview. Often, this is just so that they can be prepared. You might want to see if you can satisfy them by telling them that you'd like to know about the organization's formal structure, about how the organization really works and how things get done, and about the culture. If that does not satisfy them, then send them a subset of the following questions or other questions that you would prefer to ask. It would be a very good idea to tailor them as much as you can to the specific organization. These questions are just suggestions for you; you are not required to ask them, but they will give you some idea of how to inquire about the three perspectives.
The best way to conduct an interview like this is likely through Zoom. It is a good idea to have two people (at most three) at each interview: one can focus on leading the questioning (opening and closing the interview) and one on observation and taking notes. You can decide whether to record or not, and if you do, be sure to let the interviewee know and get their permission. If you do, remind them that you are doing so as an aid to memory and to share it with your team-mates who could not be present, and that you will keep anything they say confidential. You also need to ensure that you use the recording app as a crutch or as an excuse for not keeping track of the interview as you conduct it. It is often better to take good notes than to rely on a recording; it saves listening to the recording repeatedly.

It's often a good idea to start with an open-ended "inquiry" question, such as, "Could you describe your position to me?" Or, "Could you walk me through a specific issue or project you had to deal with that would give me a good idea of what you do?"

Here are some specific questions you can use to explore each of the three perspectives: Please note: these are simply suggestions, not a template. Be sure to tailor your questions to the organization and what you think might be interesting about it. For example, if the organization has recently gone through a major change or strategic challenge, do ask about that and explore what it tells you about the organization.

Note: You are expected to draw from the material covered throughout the semester.

1. **Strategic Design:**

Note: If you can draw a preliminary organization chart from the website or other materials, then it's a real time saver to take that to the interview and say that you've tried to map the organization and ask if it is correct. Failing that, you can ask the following "grouping" question:

- Could you describe your job to me? How are your responsibilities defined, and to whom do you report? Which people or units report to you? (*If you are interviewing a top executive of the organization, then simply ask them to map the structure of the*

organization for you if you couldn't find this information from other sources.)

Linking:

- We have learned that the formal reporting lines on an organization chart don't always capture the most important internal links in the organization. What are the most important internal linkages to other units for you or your unit? What are the really important external links? (*Note: They may interpret this in terms of informal links; if so, you will get some good information about the political lens.)*

You can even show the informant the list of linking mechanisms from Class 2 and ask which are the most important ones for him or her and which parts of the organization they link the unit to.

Aligning:

- What kind of performance metrics or measurement systems are used for you in your job? How useful are they for you and for the organization?
- What keeps you motivated to do your job here?
- What is the most important constraint that gets in the way of your doing your job the way you'd like to do it?
- What sort of training or orientation do you provide for new employees?

2. **Cultural Perspective:**

You can be very direct here and ask, "How would you describe the culture of your organization?" You can also ask, "If you were giving advice to a newcomer to this organization, what are two things you'd tell them never to do around here?"

Other culture-revealing questions are: "What makes a good leader in this organization?" This question is sufficiently ambiguous that an informant can either interpret it as "How do good leaders get formed here?" or "What are the characteristics of a good leader?" Either response is fine. You might also ask about symbols such as awards, ceremonial occasions, and events that bring employees together.

A third possible question is: "How do people outside this organization see it?" If they ask what you mean, you can say, "In terms of stereotypes or images or what kind of reputation it has."
A fourth line of inquiry is to point out artifacts or symbols you have observed and ask what they mean.

3. **Political Perspective:**

This is the most sensitive lens about which to inquire. You will want to be very diplomatic. Here are some ways to ask about influence and interests.

- Who has a real influence on what gets decided and what gets done in this organization?
- Most organizations have some sources of disagreement or conflict that seem to come up again and again. Can you think of any in this organization? OR Can you think of a recent issue or disagreement inside the organization or between the organization and some outside stakeholder? What was it and how did it get resolved?
- What are the most important interests that the people who work with or for you want to defend?

Ending The Interview

A very useful final set of questions for the interview is the following:
What do you like most about working here?
What do you like least?
Remember to thank them very much for their time. Don't offer to send them a copy of your paper, but you can of course agree to send a copy if they ask you to.

Writing The Report

There are many ways to organize your report. You want to ensure not only that you cover all three perspectives but that you demonstrate that you can integrate them. For example:

- Take a current or recent organizational challenge (e.g., a change initiative, the recent market downturn, a change in top management) and see how the three aspects of the organization interacted around how the organization is dealing with it.
- Integrating the perspectives in terms of the advice you can give to the organization for enhancing its effectiveness

Your final report should not exceed 20 pages in length (with all the usual parameters: double-spaced, one-inch margins, 12 font). This **does not include** any additional exhibits or appendices you might want to add, although you should keep those to a minimum. You should also add a bibliographic list of the source materials you use, and make sure that you have referenced the sources where appropriate in the text of your report using a standard format such as APA.

The group project will be graded using the following criteria:

1. Is it well written with correct spelling and grammar? Does it have a logical flow with a compelling introduction and conclusion, effective use of headings, and a professional style?
2. Is it well researched? Have you gone beyond basic internet searches and company web sites to provide strong evidence for your arguments? Do you appropriately reference your research?
3. How well do you apply and develop the three perspectives of the course? How creative and insightful is your work? Do you demonstrate rigour and critical thinking?
4. Are your recommendations grounded in your analysis of the organization and appropriate to its needs?

A note about group process. Group assignments only tend to produce effective results if a) all members do their fair share of the work, and b) members divide responsibilities in an optimal manner. To help you do that, we are offering some advice and instituting some requirements.
Our advice is that you designate someone (one or two people) in your group as the designated copy-editor or report assembler. This will ensure that the reports are coherent and well-written. Make sure the other members give their individual parts to the copyeditor far enough in advance for the person to be able to do her or his work effectively. I also suggest that each group designate one or two people as the designated presenter(s). This will ensure that someone is responsible for ensuring that the highest quality presentation is delivered. Responsibilities should be assigned in a manner that ensures equity. So if one member is doing more to copy-edit and assemble the report, s/he should be expected to do less of the other work.
If problems arise within your group, I urge you to bring them to my attention as soon as possible. Do not wait until the end of the semester. The longer you wait to alert me, the less likely I am to be able to help you

🗄 **Again, an important part of conducting the project for ORGS 2200 is library research to find information about your chosen organization from library databases, business press, etc.**

🗄 **Be sure to check out this link for help with research and using the library resources.**

Grading rubric for the group presentation can be found in Canvas

Final In-Class Examination

Students will write an in-class final exam during Week 10.

It will consist of multiple-choice questions and is cumulative, covering material from classes 1–9.

It will assess the extent to which you have learned the frameworks and tools of the “three perspectives” and are able to integrate them across them and apply them to various contexts that have been covered in the second half of the course.

It will be a multiple-choice test, examining your knowledge of the course readings, the class materials, Learning Modules, and the in-class discussions.

GRADING SCHEME

A+	100%	to	89.5%
A	< 89.5%	to	79.5%
B+	< 79.5%	to	74.5%
B	< 74.5%	to	69.5%
C+	< 69.5%	to	64.5%
C	< 64.5%	to	59.5%
D+	< 59.5%	to	54.5%
D	< 54.5%	to	49.5%
F	< 49.5%	to	0%

CLASS-BY-CLASS SYLLABUS

Class 1
Topic: Introduction
Required Pre-Class Materials
Article Reading: Understanding Organizations
Text Reading: Liars Poker, Chapters 1-4
Discussion Questions
1. Chapters 3 and 4 describe the Salomon Brothers training programme. What was the purpose of this training programme?
2. Did the students learn what the organization expected them to do? Did they learn things the organization did not expect? Why?

Class 2
Topic: Organizations as Strategic Designs
Required Pre-Class Materials
Article Reading: The Organization as a Strategic Design
Article Reading: Strategic Design Change at a Technology Company

Class 3
Topic: Organization as Political Systems
Required Pre-Class Readings
Text Reading: Liar's Poker, Chapters 5, 6 and 7
Article Reading: The Organization as a Political System
Article Reading: Kleiner, A. (2003). Are You In with the In Crowd? Harvard Business Review, 81(7), 86–92.
Article Reading: Cross & Prusak, "The People who make organizations go - or stop"
Case: Navigating Organization Politics: The Case of Kristen Peters (A)
Assigned Work Due
Organizational Analysis - Proposed Organization Submission

Class 4
Topic: Organizations as Cultures
Assigned Readings
Text Reading: Review Chapter 5 in Lia r ' s P o k e r and think about how you would analyze the subculture of Ranieri's Mortgage Bond group compared to the dominant organizational culture of Salomon Bros.
Article Reading: Organizations as Cultures

Class 5
Topic: Integrating The Lenses
Required Pre-Class Readings
Article Reading: Three Lenses on Organizations
Text Reading: Liar's Poker - Re-read Chapter 7
How Management Has Failed at RIM - Canadian Business
Discussion Questions
1. What strategic design, political, and cultural factors cause problems?
2. How did those factors interact?

Class 6
Topic: In-Class Team Project - The Three Lenses
Assigned Work Due:
In-Class Team Project : Three Lenses Slide Deck

Class 7
Topic: Managing Complex Environments

Required Pre-class Readings
Article Reading: Organizational Action in Complex Environments
Case: Does Mattel's iconic Barbie doll need a makeover?

Class 8
Topic: Managing Teams and Diversity
Required Pre-class Readings
Article Reading: Three lenses on Teams
Bridging Fault-lines in Diverse Teams by Gratton, L., Voight, A. and Erickson T. MIT Sloan Management Review, 48-4, Summer 2007:

Class 9
Topic: Organizational Change
Required Pre-class Readings
Article Reading: Organizational Change
Article Reading: The Strategy That Wouldn't Travel - Harvard Business Review Article

Class 10
In-Class Final Exam - Multiple choice questions.

Class 11
Topic: Changing Organizations and Changing Society
In addition to the topic of Changing Organizations and Changing the Society, this class will include an opportunity for each group to receive guidance on the Final Project.
Overview: Team Reports and Presentations

Class 12 - Team Reports and Presentation Viewing

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 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/ (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

Students are encouraged to uphold compassion, kindness, empathy, and a sense of responsibility towards one another. 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 or in-person 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 property of the instructor unless otherwise stated. Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law.

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

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From:
Date: Feb. 26, 2024
Re: Add a blended delivery mode format to existing modes of MGMT 1000 3.0: Introduction to Business

Motion: For Faculty Council to approve the addition of a blended delivery mode format for MGMT 1000 3.0 - Introduction to Business

Rationale:

This request to add a blended delivery mode format to the MGMT 1000 Introduction To Business course is based on the following considerations:

- **Enhanced and tailored learning experience for students:** At the request of the current and immediate past Undergraduate Program Directors and in response to the new Program Learning Outcomes for the undergraduate BBA program, the MGMT 1000 Introduction To Business Course has transitioned in a direction that lessens the amount of traditional business functional content and increases skills related to program learning outcomes 3-5 (Teamwork, Professional Development and Personal Development). This has created the opportunity to modularize the course by adding a combination of asynchronous modules to introduce the students to critical Schulich resources and capabilities: the CCD, the Bronfman library, Chris Carder's Innovation and Entrepreneurship group and Minerva Cernea's Professional Development and Experiential Education Office. It also builds in the flexibility to add asynchronous modules on DEI, CSR, and "sources and citations" that can easily be tweaked or changed out in future years, as the program evolves and students' learning needs change.
- **Positive student feedback on blended learning approach:** During COVID, and over the past 3 years, I have developed new content and resources, including a series of valuable online modules that students review at their own time and pace. These include pre-recorded lectures and instructional videos that cover more routinized or foundational content, as well as educational and motivational videos of interviews with Schulich alums working in various professions to educate students about potential career paths. These

asynchronous resources allow in-person class time to be spent on interactive discussions, case studies and team exercises to apply learnings from asynchronous content. Taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further experiment with different contents, formats, and techniques for engagement.

- **Alignment with the format of other large-scale enrolment classes**: The move to a blended delivery mode for MGMT 1000 will result in roughly 30% of the course being taught through asynchronous content on pre-recorded lecture videos and exercises that students will work through on Canvas. As a result, the number of TAs supporting the course will drop from 10 to 2, resulting in significant cost savings. The increase in asynchronous content will facilitate a manageable grading burden for the TAs
- **Scalability for future growth in enrollment**: The blended teaching model will position the course for future growth in enrollment through a scalable, modular approach so that enrollment can increase to 900 students with only minor changes to the staffing model, and no changes to the course format

Finally, this blended proposal supports a call by York's Associate Vice President Teaching and Learning for blended courses to "become a common and accepted approach for course delivery at York."

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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 BBA Program

2. Responsible Unit:
Strategic Management

3. Subject Code (Rubric) and Course Number:
MGMT 1000

4. Credit Value:
3.00

5. Long Course Title:
Introduction to Business

6. Short Course Title:
Introduction to 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
	retire course
X	other **(please specify):** Add a blended delivery mode format to the course

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

9. **Rationale:**
This request to add a blended delivery mode format to the MGMT 1000 Introduction To Business course is based on the following considerations:

- ***Enhanced and tailored learning experience for students:*** *At the request of the current and immediate past Undergraduate Program Directors and in response to the new Program Learning Outcomes for the undergraduate BBA program, the MGMT 1000 Introduction To Business Course has transitioned in a direction that lessens the amount of traditional business functional content and increases skills related to program learning outcomes 3-5 (Teamwork, Professional Development and Personal Development). This has created the opportunity to modularize the course by adding a combination of asynchronous modules to introduce the students to critical Schulich resources and capabilities: the CCD, the Bronfman library, Chris Carder's Innovation and Entrepreneurship group and Minerva Cernea's Professional Development and Experiential Education Office. It also builds in the flexibility to add asynchronous modules on DEI, CSR, and "sources and citations" that can easily be tweaked or changed out in future years, as the program evolves and students' learning needs change.*
- ***Positive student feedback on blended learning approach:*** *During COVID, and over the past 3 years, I have developed new content and resources, including a series of valuable online modules that students review at their own time and pace. These include pre-recorded lectures and instructional videos that cover more routinized or foundational content, as well as educational and motivational videos of interviews with Schulich alums working in various professions to educate students about potential career paths. These asynchronous resources allow in-person class time to be spent on interactive discussions, case studies and team exercises to apply learnings from asynchronous content. Taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further experiment with different contents, formats, and techniques for engagement.*
- ***Alignment with the format of other large-scale enrolment classes****: The move to a blended delivery mode for MGMT 1000 will result in roughly 30% of the course being taught through asynchronous content*

on pre-recorded lecture videos and exercises that students will work through on Canvas. As a result, the number of TAs supporting the course will drop from 10 to 2, resulting in significant cost savings. The increase in asynchronous content will facilitate a manageable grading burden for the TAs

- ***Scalability for future growth in enrollment**: The blended teaching model will position the course for future growth in enrollment through a scalable, modular approach so that enrollment can increase to 900 students with only minor changes to the staffing model, and no changes to the course format*

Finally, this blended proposal supports a call by York's Associate Vice President Teaching and Learning for blended courses to "become a common and accepted approach for course delivery at York."

10. Proposed Course Information:

n/a

Existing Course Information (Change From):	**Proposed Course Information (Change To):**
	Changes to the course syllabus are reflected in the attached updated syllabus. Course title, description, and learning outcomes remain identical to the existing course information.

11. Enrolment Notes:

n/a

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12. Consultation:

n/a

Originator:

Signature	February 29, 2024 Date
Graeme Deans 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
n/a Name	 Area or Specialization

Degree Program:

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

Burkard Eberlein Signature	March 22, 2024 Date
Burkard Eberlein Name of Program Director	BBA Program Program

Program Committee:

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York University

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

MGMT 1000 A and B 3.0: Introduction to Business

Course Outline

Term: Fall 2024

The course will be taught through a combination of 2-hour weekly lectures, 1-hour biweekly tutorials and 1-hour bi-weekly asynchronous content sessions.

The course will begin on ***Thursday September 5, 2024*** with an online synchronous course introduction as follows:

- Section A: 10:00 - 11:00 am on Zoom
- Section B: 8:30 – 9:30 am on Zoom

In the weekly 2-hour lectures each Monday, students will learn key skills in the areas of Effective Teamwork, Professional Development and Personal Development at an introductory level. They will also be introduced to key Schulich resources that will be of assistance to students throughout their 4-year program. The **Lectures** will be held as follows:

- Section A: Monday 11:30 am – 1:30 pm in the Main Auditorium
- Section B: Monday 2:30 pm – 4:30 pm in the Main Auditorium
- First Lecture: ***Monday September 9, 2024***

For the Thursday tutorial sessions, students will be placed into tutorials of ~50-55 students led by a TA. On alternating weeks, students will learn through **Asynchronous Content Sessions** and **In-Person Tutorials**. Your TA contact information and assigned classroom will be communicated to you in the first week of class. Please refer to the chart entitled "Course Schedule and Overview" in Exhibit 1 at the end of this document to determine when your tutorial session will be virtual or in-person on any given week.

Asynchronous Content Sessions: On alternating weeks, students will study important Professional Development and Personal Development topics and learn about key Schulich resources through asynchronous content delivered on Canvas. Content will be delivered through online lectures recorded by the instructor and guests, video exercises and self-guided exercises. Students are expected to complete the assigned content each week and their progress will be evaluated on an ongoing basis throughout the term and through a comprehensive quiz on November 14th.

In-Person Tutorials: On the other alternating weeks, students will meet in-person with their TA and work through experiential learning exercises and team-based activities and assignments to bring the concepts they have learned in the lectures to life. Students will be instructed by a TA and will placed into teams of 5-6 students who they will work with throughout the term.

*Please note: Due to capacity issues, students are **only permitted to** attend the lecture and tutorial in their registered time slot.*

Instructor:

Name: Graeme Deans
Office: N205C, Seymour Schulich Building
Email: gdeans@schulich.yorku.ca
Office hours: 9:30 – 11:00 am Mondays in room N205C (Economics Department)
No appointment required – first come, first serve

Graeme Deans is an Adjunct Professor at the Schulich School of Business, where he teaches undergraduate, MBA and Executive MBA courses. He has taught part-time at Schulich for the past 15 years. He has won the prestigious Teaching Excellence Award three times and has been nominated for the award 21 times. Graeme is also a retired Partner with EY. He has over 35 years of management consulting experience with EY, Kearney (formerly A.T. Kearney) and Booz & Company (now Strategy& at PwC) and has advised Fortune Global 1000 clients on strategic and operational issues in North America, Asia and Europe.

Course Administrator:

Name: Stephanie Allen
Office: N305A
Email: sallen@schulich.yorku.ca
Phone: 416.736.2100 ext. 66125

Brief Description

The goal of the Introduction to Business course is to provide students with opportunities to learn key skills in the areas of Effective Teamwork, Professional Development and Personal Development at an introductory level. They will also be introduced to key Schulich resources that will be of assistance to students throughout their 4-year program. Using in-person lectures, team-based exercises, interactive discussions, articles about companies in the news and case studies, and drawing on the experience of the instructor and invited guests, this course will provide a solid foundation to help students develop the general management skills (e.g., teamwork, personal and professional development, leadership and global business perspective) required to be successful during their four years at Schulich and to help them prepare for their chosen career path.

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Course Learning Outcomes

The goal of the Introduction to Business course is to provide students with opportunities to learn key skills in the areas of Effective Teamwork, Professional Development and Personal Development at an introductory level. They will also be introduced to key Schulich resources that will be of assistance to students throughout their 4-year program. The course will complement the first- and second-year Schulich curriculum and will introduce many of the most important concepts that students learn throughout their undergraduate experience. The core learning outcomes from the course include:

- **Effective teaming**: Since so much of a successful business career is driven by effective teamwork, the first learning outcome will be to develop skills in the area of effective teaming. Students will learn about the lifecycle of a team, how to develop a meeting agenda and run effective team meetings and interactions, how to deal with interpersonal team dynamics and how to respond to setbacks. Students will apply these learnings in several assignments and exercises throughout the term
- **Professional development**: The second learning outcome will be to learn new professional skills required to become a successful business-person and get practical experience in applying them through weekly tutorials and class discussions. Students will be introduced to networking techniques and skills to help them to meet business professionals and learn about potential career paths that may interest them to pursue upon graduation. Students will also learn about how to develop and present effective written communications and oral presentations and will have numerous opportunities to practice these skills throughout the term
- **Personal development**: Because of the introductory nature of the course, the final learning objective is for students to reflect on the learning experiences in their first term of their business studies as a basis for understanding their professional, personal and career interests, objectives and areas they want to emphasize throughout their Schulich experience. Students will also hear from expert guests on how to develop skills in important personal development areas including leadership, time management, integrity and business etiquette
- **Global business perspective and worldview**: Students will be exposed to introductory global business experiences that are current focus areas in the business community. For the Fall 2024 term, students will hear from expert guests on DEDI (Decolonization, Equity, Diversity and Inclusion) and CSR (Corporate Social Responsibility)
- **Schulich student resources and support functions:** Students will be introduced to several critical support functions and resources at Schulich, including the Professional Development and Experiential Education Office, the CCD (Centre for Career Design), the Bronfman research library and the school's resources and capabilities to support entrepreneurship and the Schulich start-up community

Students will learn through a combination of 2-hour weekly lectures, 1-hour biweekly tutorials, 1-hour bi-weekly asynchronous content sessions, and readings and exercises to prepare for each lecture and tutorial. Students must complete any assigned exercises and read the assigned articles before each weekly lecture or tutorial.

The weekly lectures will focus on interactive exercises to understand course materials and discuss any

pre-assigned readings or exercises in more depth. In the weekly lectures, the instructor will present case studies based on his professional experience to illustrate key concepts we will be learning during the term. The instructor will also invite business executives and entrepreneurs to class to discuss their career path and illustrate the concepts learned in class through challenges they have experienced in their careers.

In the in-person tutorials, students will be assigned to teams and will learn how to work effectively in a team environment. Students will complete several team and individual exercises that will provide them with an opportunity to discuss and apply the concepts learned during the lectures.

Deliverables at a Glance

The deliverables for this course are intended to provide opportunities for students to apply the skills they have learned in the course in simulated and real-life exercises and assignments over the course of the term:

Assignment/Task	Quantity	% Weight	Type
Effective teaming exercises and assignments	4	40%	Team
Career networking assignment	1	15	Individual
Class and tutorial participation	1	10	Individual
Personal and Professional Development • LinkedIn page assignment • Quiz on Asynchronous content session materials	2	20	Individual
Final exam	1	15	Individual

The first set of deliverables for the course will be on effective teaming. Students will be assigned to a team at the beginning of the term and will work in their teams during the weekly tutorials on a variety of exercises to reinforce what they have learned. The components of the effective teaming deliverable are:

- Developing a team charter (first in-person tutorial – 5% of the final grade)
- Team visit and report on a retail business of your choice (third in-person tutorial – 15% of the final grade)
- Company research report and presentation on a company of your choice (fifth in-person tutorial – 15% of the final grade)
- Team meeting minutes and term debrief reflection (following the final presentation – 5% of the final grade)

The career networking assignment ("CNA") will run in parallel with the course and will give students an opportunity to network with new business contacts, apply the concepts they learn in the course and the learnings from the course guests into an initial set of ideas about what careers they may be interested in pursuing upon graduation from Schulich. The assignment will be worth 15% of the overall grade.

Two individual course deliverables will emanate from the asynchronous content sessions:

- Based on the training, advice and guidelines provided by the CCD, students will develop their own LinkedIn page (second asynchronous content session – 5% of the final grade)
- A quiz covering all of the materials learned through the first four asynchronous content sessions (will take place virtually during the November 14th tutorial timeslot – worth 15% of the final grade)

Finally, the final exam will be a 2-hour exam that will ask students to reflect on the experiences they have had during the term and on what they have learned through the major modules of the course. The final exam will be open book, online in the week following our final lecture and will be worth 15% of the overall grade.

For details about each major assignment, please refer to the "Written Assignments" section of this course curriculum, below. In addition, the instructor will provide more details on each assignment on Canvas as the term progresses.

Course Material

Optional, supplementary reading for this course includes the following textbook:

Nickels, William G., McHugh, James M. and McHugh, Susan M., **Understanding Canadian Business**, 11th edition (McGraw-Hill, 2010) ISBN: 978-1-26-088136-3

Please note that the textbook is not mandatory, but it is an excellent reference book that will be useful to you throughout your time at Schulich and will provide additional detail to the concepts and topics we discuss throughout the term.

Weekly lecture and tutorial slides, class exercises, assignment details and articles will be posted on Canvas, Schulich's online course management system. Please check Canvas frequently!

Finally, it is important for students to develop the habit of following current business news. To accomplish this goal, students should regularly read front page business news articles and follow major business social media sites (Globe & Mail Report on Business, Wall Street Journal, The Economist magazine) to broaden their business knowledge and contribute to class and tutorial discussions meaningfully.

Student Preparation for Class and Class Participation: Expectations

Attendance. Attendance in class and tutorials is a requirement for this course and your attendance is expected for the full duration of each lecture and tutorial. Attendance will be taken for each lecture and tutorial. Please inform your tutorial leader before the class if you need to miss a lecture or tutorial. Permissible reasons to miss class are a job interview, illness (note from a medical professional required) or participation in a sanctioned Schulich school activity (note required).

Please note that lectures and tutorials will not be recorded, and the instructor does not permit the recording of any lectures, tutorials or class activities by students.

Preparation. This course will be conducted in a highly interactive format and there is a lot of reading required for this course. You are expected to come to lectures and tutorials well-prepared and ready to participate, and contribute your ideas, insights and analyses. Each week you will be asked to prepare a weekly exercise or think about the major issues facing the business community in general, or a company in the news before the live lectures. All assignments will be submitted onto Canvas prior to the tutorial meeting in which they are due.

Class Participation (10% of the final grade). Class participation will be evaluated by the instructor and the tutorial leaders (TAs) based on your attendance, participation during the lectures, tutorials and team activities, and the quality and frequency of meaningful contributions by each student over the course of the term. Meaningful contributions are contributions that add insight and depth to the topics and issues we discuss in class (as opposed to repetition of facts or talking for the sake of talking).

Poll Everywhere: We will be using Poll Everywhere to provide additional ways for students to engage with the course materials and with the topics we discuss in class and to take attendance. Please familiarize yourself with the Poll Everywhere app – there will be no acceptable excuses for not being able to participate in PollEverywhere course activities.

If you need help with the course. Students have many ways to access help and assistance if they have questions or are experiencing difficulties with the content of the course. Please don't be shy to ask for help if you have a question or don't understand something! Some suggestions, based on feedback from students in previous years, include:

- Ask a friend or a fellow student
- Form a study group
- Read each assignment feedback memo from the instructor (posted on Canvas announcements) ***in detail***
- Read the detailed feedback on your assignments in Canvas from your TA ***in detail***
- Ask your question during the live lecture or tutorial
- Send TA or instructor an email with your question
- Ask for a tutorial if several students you know have the same issue
- Sign up for an appointment during my office hours on ZOOM
- If you are having technology issues, please go to SysAid in Canvas and use the Chat function to access help
- If you are having personal issues, please contact Schulich Student Services and International Relations (SSIR) for help

Class-by-Class Syllabus

Welcome and Course Overview: Thursday September 5 – Virtual session on Zoom

Session topics:

- Instructor and student introductions

- Course overview, course objectives, course deliverables and grading criteria
- Perspectives on university vs. high school
- Q&A

Lecture #1 – Effective teaming #1 (Monday September 9)

Preparation for the lecture:

- *"Teamwork Skills: Being an Effective Group Member"* – University of Waterloo Centre For Teaching Excellence

Lecture Session Topics:

- Student introductions: Icebreaker exercise
- Class discussion on the business reasons for teaming and the life cycle of a team
- What is a team charter?
- How can each student contribute to an effective team and be a leader?
- Poll Everywhere discussion and reflection

Optional supplementary readings:

- *Understanding Canadian Business*: Chapters 14 and 15

In-Person Tutorial #1: Thursday September 12 (Section A) or 19 (Section B) – Team charter

Please note: In-person tutorial sessions will be held with your TA in your Sections' assigned classroom

Preparation for tutorial:

- Read article posted on Canvas: *"Making Group Contracts"* – University of Waterloo Centre For Teaching Excellence

Session Topics:

- TA and student introductions and icebreaker
- Team warm-up exercise
- Work in assigned teams to prepare team charter
- Instructions for retail store team visit exercise, which is due before the start of your 3rd in-person tutorial
- Reminder that your team charter must be posted onto Canvas before the start of your next Virtual Content Session, one week from now

Asynchronous Content Session #1: Thursday September 19 (Section A) or 12 (Section B) – Workplans and time management

Session Topics:

- Learn how to design and use a workplan, for both personal and team-related activities and projects
- Discuss effective time management strategies and approaches

- Complete practice exercises online

Lecture #2 –Networking #1 (Monday September 16)

Lecture Session Topics:

- Guest: Dr. Minerva Cernea (Leader of Schulich's Professional Development and Experiential Education Office)
- Discussion: Why is networking an important skill and what are the key steps in the networking process?
- Networking tips for success
- Step-by-step demonstration of the networking process
- Poll Everywhere discussion and reflection

Supplementary readings:

- *Understanding Canadian Business*: Chapter 1

Lecture #3 – Effective teaming #2 (Monday September 23)

Preparation for the lecture:

- *"Meeting Strategies For Group Work"* – University of Waterloo Centre For Teaching Excellence

Lecture Session Topics:

- Guest: Genevieve Therrien (Major in the Canadian Armed Forces' Military Police – two tours in Afghanistan)
- Class discussion on:
    - How to set an agenda for a team meeting
    - How to conduct effective team meetings
    - How to take meaningful meeting minutes
    - How to get input and contributions from each team member
- How do effective teams respond to, and recover from, setbacks and challenges?
- Poll Everywhere discussion and reflection

In-Person Tutorial #2: Thursday September 26 (Section A) or October 3 (Section B) –Team-building exercises

Session Topics:

- Team charter discussion and assignment feedback from TA
- Interactive team leadership and teambuilding exercises
- Interactive team setback exercises
- Instructions for retail store visit assignment

Asynchronous Content Session #2: Thursday October 3 (Section A) or September 26 (Section B) –DEI and CSR

Session Topics:

- Guest: Saumya Gautam (Director of Equity, Diversity and Inclusion at St. Joseph's Healthcare)
- Decolonization, Equity, Diversity and Inclusion: Definitions, frameworks for considering and analyzing impact and discussion of the importance in the workplace
- Corporate Social Responsibility: Definitions, frameworks for considering and analyzing impact and discussion of the importance in the workplace
- Complete practice exercises online

Lecture #4 – Networking #2 (Monday September 30)

Session Topics:

- Guest: Dr. Minerva Cernea (Leader of Schulich's Professional Development and Experiential Education Office)
- Roleplay exercise of how to introduce yourself in a business setting
- Roleplay of how to plan for and conduct a successful business or networking meeting
- How to follow-up after a business or networking meeting - what is an "advance", and why is it so important?
- Poll Everywhere discussion and reflection

Supplementary readings:

- *Understanding Canadian Business*: Chapter 2

Lecture #5 – Personal and Professional Development #1 (Monday October 7)

Session Topics:

- Class discussion on brainstorming: why is brainstorming important, how to conduct a brainstorming session and how to capture the value following a brainstorming session
- Introduction to business etiquette
    - What is the scope of business etiquette?
    - Why is it important?
    - Introduction of a framework of business etiquette
- Poll Everywhere discussion and reflection

In-Person Tutorial #3: Thursday October 10 (Section A) or 24 (Section B) – Team Retail Visit Debrief

Session Topics:

- Class and team discussions and presentations on the retail store team visit exercise
- Team debrief and reflections on the retail store team visit exercise
- Reminder that your retail store team visit exercise write-up must be posted onto Canvas before the start of this tutorial

Asynchronous Content Session #3: Thursday October 24 (Section A) or 10 (Section B) – Bronfman Library Resources and Research Tools

Session Topics:

- Guest: Schulich's Head Librarian will provide an overview of the library's resources
- Watch videos: Schulich library research resources and tips (Parts 1 and 2)
- Complete practice exercises online

**** REMINDER: Thanksgiving Holiday ** - No class and no tutorial the week of October 14-18**

Lecture #6 – Schulich Centre for Career Design ("CCD") Capabilities (Monday October 21)

Session Topics:

- Guest: Hollis Sinker (Executive Director of Schulich's Centre for Career Design) and selected members of the CCD team
- Overview of CCD's resources, organization and capabilities
- Quiz on summer internship recruiting: Facts and Myths
- Interactive exercise: Summer internship roadmap
- Training on how to set up your personal LinkedIn page

Supplementary readings:

- *Understanding Canadian Business*: Chapters 3 and 4

Lecture #7 – Personal and Professional Development #2 (Monday October 28)

Session Topics:

- Guest lecturer: Dorenda McNeil (author of the book "Virtually Perfect Business Etiquette")
- Business etiquette examples, videos and roleplay exercises for everyday workplace situations
    - Business meetings
    - Meeting a customer
    - Recruiting interviews
    - Networking events
- Poll Everywhere discussion and reflection

Supplementary readings:

- *Understanding Canadian* Business: Chapter 12

In-Person Tutorial #4: Thursday October 31 (Section A) or November 7 (Section B) – Career Networking Assignment Debrief

Session Topics:

- Reminder that your Career Networking Assignment must be posted onto Canvas before the start of this tutorial
- Retail visit discussion and assignment feedback from TA
- Student breakout exercises to share highlights of their Career Networking Assignment
- Instructions for the company research presentation

Asynchronous Content Session #4: Thursday November 7 (Section A) or October 31 (Section B) – Integrity, Sources and Citations

Session Topics:

- Guest: Hedy He (Schulich alum and Lawyer at Stikeman Elliott)
- Definitions and discussion of the importance of business and academic integrity
- Demonstration and examples of how to properly cite sources for academic and business purposes
- Citation requirements, formats and guidelines
- Complete practice exercises online

Lecture #8 – Effective Written Communication (Monday November 4)

Session Topics:

- Guest: Michelle Gupta (Senior Director of Brand Management at Procter & Gamble Canada)
- Discussion of effective writing techniques in various forms of business communication
    - Emails
    - Letters
    - Reports
    - Social media
- Tips for writing clear, easy-to-understand business communication
    - Paragraph headings
    - Bullet points
    - Tables
    - Stating your conclusion up-front
- Class exercise: Evaluating the communication strategies used in P&G's annual report
- Poll Everywhere discussion and reflection

Lecture #9 – Effective PowerPoint Slides (Monday November 11)

Session Topics:

- Class discussion: What are the key components of an effective PowerPoint slide deck?
    - What are the key attributes of a compelling PowerPoint slide?
    - What is the right balance between lots of content/text and a clear, easy-to-understand message?
    - What is a "headline"? Why do people use them and why are they important
- Class exercise: Rating selected slides from year's NBTA presentations and lessons learned to improve
- Class exercise: Redesigning a slide from your Retail Visit assignment for clearer communication
- Poll Everywhere discussion and reflection

Online Quiz On Content Learned In Asynchronous Content Sessions: Thursday November 14 (Sections A and B)

- Quiz will cover all topics discussed during the virtual tutorials:
    - Workplans

  - Time management strategies
  - DEI
  - CSR
  - Accessing Bronfman Library resources
  - Integrity
  - Sources and citations
- Quiz will be held between 9:00 – 10:00 am online, on Canvas, for all Sections and is worth 15% of your final grade

Lecture #10 – Effective Presentations and Response to Q&A (Monday November 18)

Session Topics:
- Class discussion: What are the key components of an effective business presentation? What are the best ways to prepare? What are some best practices for overcoming nervousness?
- Class exercise: Rating previous year's NBTA presentations and lessons learned
- Interactive student introductions exercise
- Class exercise: Evaluating videos of CEO presentations to shareholders and lessons learned
- Class discussion: Synergies between effective PowerPoint slides and ease/effectiveness of oral presentations

In-Person Tutorial #5: Thursday November 21 (Section A) or 28 (Section B) – Final Group Presentations

Session Topics:
- Reminder that your company research project must be posted onto Canvas before the start of this tutorial
- Each team will present their company research project
- As inputs to the grading process:
  - Students will complete self-evaluations of their team's presentation and will also evaluate the other student presentations that they watch
  - Students will also evaluate their own contributions to their team as well as the contributions of each of their teammates

Asynchronous Content Session #35 Thursday November 28 (Section A) or 21 (Section B) – Reflection and Lifelong Learning Skills

Session Topics:
- Guest: Michelle Gupta (Schulich alum and Senior Brand Director, Procter & Gamble Canada)
- Reflection and Lifelong Learning: Definition and discussion of their importance
- Training on how to prepare a strong reflection and develop action items for continuous improvement
- Exercise: Term-end team debrief on final presentation
  - Team effectiveness
  - Assessment of contributions from each team member
  - Self-assessment of your own contributions to your team

Lecture #11 – Schulich's Resources for Entrepreneurs and Start-Ups (November 25)

Session Topics:

- Guest: Chris Carder (Executive Director, Innovation and Entrepreneurship at Schulich)
- Panel of upper year undergraduate students who are pursuing start-ups and careers in entrepreneurship
- Class discussion about the resources and tools available to students who are interested in starting a business
- Case studies and discussion with student panelists about their entrepreneurship experience
- Student Q&A
- Schulich course evaluations: ONCE and TEA
- Poll Everywhere discussion and reflection

Lecture #12 – Team Presentation Highlights, CCD Summer Internship Panel and Course Summary (Monday December 2)

Lecture preparation:

- A practice final exam will be posted on Canvas for interested students to attempt before the lecture, if you wish

Session Topics:

- Summer internship panel led by upper year undergraduate Schulich students
- Company research presentation feedback and highlights from course instructor and TAs
- Class discussion and reflection about lessons learned
- Discuss practice final exam questions and suggested responses
- Final exam Q&A, procedures, instructions and advice
- Course summary

Please note: The final exam will be held in-person on Monday December 9 (timing and location TBD)

Written Assignments, Projects and Final Exam: Descriptions

In order to successfully complete the course, students will complete three major assignments, participate actively in class and the tutorials, and write the final exam. Descriptions of each component of the final grade are as follows and detailed instructions will be provided by the instructor or your TA in class:

Effective Teaming exercises – 40% of final grade

Students will be assigned to a team at the beginning of the term and will work in their teams during the weekly tutorials on a variety of exercises to reinforce what they have learned. The components of the effective teaming exercises are as follows:

- Developing a team charter (first in-person tutorial – 5% of the final grade)
- Team visit and report on a retail business of your choice (third in-person tutorial – 15% of the final grade)
- Company research report and presentation on a company of your choice (fifth in-person tutorial – 15% of the final grade)
- Team meeting minutes and term debrief reflection (following the final presentation – 5% of the final grade)

Career Networking Assignment paper – 15% of final grade
The career networking assignment will run in parallel with the course and will give students an opportunity to network with new business contacts, apply the concepts they learn in the course and the learnings from the course guests into an initial set of ideas about what careers they may be interested in pursuing upon graduation from Schulich. The assignment will be worth 15% of the overall grade.

Exercises based on content covered during Asynchronous Content Sessions - 20% of final grade
During the Asynchronous Content Sessions, students will be exposed to several introductory global business experiences that are current focus areas in the business community and will be required to complete two assignments based on these topics and learnings:

- Based on the training, advice and guidelines provided by the CCD, students will develop their own LinkedIn page (second virtual tutorial – 5% of the final grade)
- A quiz covering all of the materials learned through the first four asynchronous content sessions (will take place virtually during the November 14th tutorial timeslot – worth 15% of the final grade)

Class and tutorial participation – 10% of final grade
Presenting your ideas in large and small group forums is an important skill to develop for managing in today's context. Therefore, you will be expected to actively contribute to discussions in class and tutorials. Your class participation grade will be determined jointly by your instructor and your tutorial leader, and will be based on your attendance, quality and level of contributions to the lectures and tutorials, and quality and level of contributions to your tutorial team and teammates.

Final Exam - 15% of final grade
The objective of the final exam will be to provide students with an opportunity to reflect on the experiences they have had during the term and on what they have learned through the major modules of the course. The format of the final exam will be a 2-hour, closed book, in-person on the week following our final lecture.

We will review and discuss a practice exam during the Week 12 lecture period to help students to set their expectations around the content of the final exam. The final exam will be worth 15% of the overall grade.

Evaluation of Written Assignments, Projects and Exams

Please see the "Deliverables At A Glance" section on p. 2 for more detailed information. The details for each assignment will be discussed during the tutorials or lectures. Instructions will include specific details

about deliverables, expectations, tips for success, as well as the evaluation rubric to be used for grading purposes. If you have questions, please ask your tutorial leader or the instructor.

Penalties for late submission are as follows:

- 5% off immediately if your assignment is not submitted onto Canvas by the deadline date and time. Usually this will be before the beginning of the tutorial in which it is due
- An additional 5% off per day for each additional day the assignment is late, beginning on the due date
- It is **your** responsibility to successfully load your assignments onto Canvas on time. Please make sure that you receive and understand Canvas training on how to do this
- It is **your** responsibility to respond to Poll Everywhere surveys and word clouds questions on time. Please make sure that you receive and understand Poll Everywhere training on how to do this
- The TAs and I **will not** remind or chase students who haven't handed in assignments. This is to simulate the real-world work environment – your future bosses will not chase you either…

Calculation of Course Grade

In this course, final course grades will be determined by the following process: Each piece of work during the term will receive a numerical grade out of 100%. At the end of the term, the instructor will calculate a final numerical grade out of 100% according to the weightings of each assignment. Equivalences are as follows:

Percentage	Letter Grade	Number Grade	Comments
Below 50%	F	1	Failing
50-54	D	2	Barely Passing
55-59	D+	3	Passing
60-64	C	4	Fairly Competent
65-69	C+	5	Competent
70-74	B	6	Good
75-79	B+	7	Very Good
80-89	A	8	Excellent
90 and above	A+	9	Exceptional

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. In addition, please note that the Faculty Council of the Schulich School of Business has established that "…*the average grade for SSB courses offered at the BBA level should be between 5.5 and 7.0*". This course will be graded in accordance with these grading guidelines.

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

Stephanie to find and insert:
York University behavior standards for ZOOM and Canvas chat room, Code of Conduct, use of AI, etc.

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. For each assignment, you will have to demonstrate the originality of your work. The easiest way to do this is to submit an electronic copy of it to Turnitin. This is a web-based service that checks for plagiarism. If you want to demonstrate your originality in some other way, you are invited to do so, but your method must be approved by the instructor. Detailed instructions for using Turnitin will be provided.

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/.

Absence from Final Exam: 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 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

Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Title and Date	Activity/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
Effective teaming exercises In-person tutorials #1, 2, 3 and 5 Section A: Sep 12 and 26, Oct	In-class team presentations	Team meetings and discussions on assigned topics	Template for team responses to be discussed prior to assignment due dates

Class No., Title and Date	Activity/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
10, Nov 21 Section B: Sep 19, Oct 3 and 24, Nov 28			
Career Networking Assignment In-person tutorial #4 Section A: Oct 31 Section B: Nov 7	Career Networking Assignment final paper	Career panel discussions and individual student networking	500-word essay plus exhibits, if desired
Asynchronous Content Exercises Virtual tutorial #2 and online quiz Section A: Oct 3 and Nov 14 Section B: Sep 30 and Nov 14	Develop personal LinkedIn page	Complete content from virtual tutorials #1-4	Complete quiz on Nov 14
Class Participation	Actively participate and contribute in both lectures and tutorials throughout the term	Listen to pre-recorded lecture(s), read any assigned materials prior to lecture, and listen and participate in lecture	Participate in word cloud exercises in real time on Poll Everywhere app
Final Examination Dec 9 (exact time and place TBD)	Final examination	All course materials (the exam will cover the major topics we have discussed throughout the term)	Note: Optional practice exam to be discussed during the December 4 lecture

Fall 2024 MGMT 1000 Schedule and Overview

Lecture Session

			1	2	3	4	5	6	7	8	9	10	11	12
			09-Sep	16-Sep	23-Sep	30-Sep	07-Oct	21-Oct	28-Oct	04-Nov	11-Nov	18-Nov	25-Nov	02-Dec
		Main Lecture Topic:	Effective Teaming #1	Networking #1	Effective Teaming #2	Networking #2	Personal and Professional Development #1	Schulich CCD Capabilities	Personal and Professional Development #2	Effective Written Communication	Effective PowerPoint Slides	Effective Presentations and Q&A	Schulich Entrepreneurship	Presentation and CCD Internship Panel

Tutorial Session

TA	Section	Tutorial Session	Kick-Off	1	2	3	4	5	6	7	8	9	10	11
			05-Sep	12-Sep	19-Sep	26-Sep	03-Oct	10-Oct	24-Oct	31-Oct	07-Nov	14-Nov	21-Nov	28-Nov
TA #1	A	1		In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30		In-Person 8:30	Virtual 8:30
	A	2		In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00		In-Person 10:00	Virtual 10:00
	B	1		Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30		Virtual 8:30	In-Person 8:30
	B	2		Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00		Virtual 10:00	In-Person 10:00
TA #2	A	1		In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30		In-Person 8:30	Virtual 8:30
	A	2	**Virtual Course Introduction**	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	**Asynchronous Content Quiz**	In-Person 10:00	Virtual 10:00
	B	1		Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30		Virtual 8:30	In-Person 8:30
	B	2		Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00		Virtual 10:00	In-Person 10:00
TA #3	A	1		In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30		In-Person 8:30	Virtual 8:30
	A	2		In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00		In-Person 10:00	Virtual 10:00
	B	1		Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30	Virtual 8:30	In-Person 8:30		Virtual 8:30	In-Person 8:30
	B	2		Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00	Virtual 10:00	In-Person 10:00		Virtual 10:00	In-Person 10:00
		In-Person Tutorial Topic:		Team Charter		Team Building and Debrief		Team Retail Visit Debrief		Networking Debrief			Final Group Presentation	
		Asynchronous Content Session Topic:		Workplans and Time Management		DEI and CSR		Bronfman Library Resources		Integrity, Sources and Citations			Reflection and Lifelong Learning	
		In-Person Assignment Due:		Team Charter (5%)				Retail Visit Report (15%)		Networking Assignment (15%)			Presentation and Debrief (15+5%)	
		Asynchronous Content Assignment Due:				LinkedIn Page Exercise (5%)						Quiz (15%)		

Exhibit 1: Course Schedule and Overview

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Bernard M Wolf
Date: January 31, 2024
Re: IBUS 4200 3.0 – course description changes

Motion:

That Faculty Council approve the revised calendar description for IBUS 4200 3.00 which removes the first sentence of the course description.

Rationale:

IBUS 4200 3.0 has always been open to non-CIM students. In fact, we never had to turn away non-CIM students since the course was never fully enrolled. However, with CIM in the first sentence of the course description, some students may have assumed that the course was solely for CIM students. Eliminating the first sentence of the calendar description will eliminate any misunderstanding.

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:** *E.g., Schulich MBA, BBA, iBBA Program*

   Schulich BBA Program

2. **Responsible Unit:** *Unit responsible for the course, e.g., Faculty Departments (ACTG, FINE).*

   ECON

3. **Subject Code (Rubric) and Course Number:** *E.g., MGMT 5150 or ACTG 2010*

   IBUS 4200

4. **Credit Value:** *E.g., 1.50, 3.00*

   3.00

5. **Long Course Title:**

   Integrative International Business Seminar

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.

   Integrative INTL Business Seminar

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)**

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8. Effective Term/Calendar Year of Proposed Change(s):
Academic term in which the proposed change will take effect. E.g., Winter 2025

Fall 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.

The proposed change will not alter the academic objectives of the course and BBA Program.

The existing CIM learning outcomes is **attached**.

IBUS 4200 is presently active. It has always been open to non-CIM students. In fact, we never had to turn away non-CIM students since the course was never fully enrolled. However, with CIM appearing in the first sentence of the course description, some students may have assumed that the course was solely for CIM students. Eliminating the first sentence will eliminate any misunderstanding.

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):***
Title ~~*Current text*~~ ~~This course is the capstone for the Certificate in International Management.~~ By exposure to senior executives operating in international business, who will be presenting seminars, and by actual visits to actual businesses, students will be able to see how real-life situations are dealt with, and what skills and mind-set are required to be successful in international business. Prerequisite or Corequisite: SB/IBUS 3200 3.00 Note: Preference will be given to students enrolled in the Certificate in International Management.	***Title*** *Current and* ***new text*** By exposure to senior executives operating in international business, who will be presenting seminars, and by actual visits to actual businesses, students will be able to see how real-life situations are dealt with, and what skills and mind-set are required to be successful in international business. Prerequisite or Corequisite: SB/IBUS 3200 3.00 Note: Preference will be given to students enrolled in the Certificate in International Management.

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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.

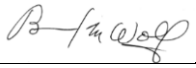
No.

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:

	January 31, 2024
Signature	Date
Bernard M Wolf	ECON Area
Name	Area or Specialization

Approvals:

Area or Specialization

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

Email attached	February 1, 2024
Signature	Date
Irene Henriques	ECON Area
Name	Area or Specialization

Degree Program:

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program
Name of Program Director	Program

Program Committee:

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Certificate in International Management (CIM)

Learning Outcomes

The student will be able to:

1. Analyze issues with a global mindset.
2. Recognize how international business is a key component of the Canadian economy.
3. Assimilate the international management examples brought by business executives, other experts and colleagues as well as their own observations in actual business establishments.
4. Engage in reflection.
5. Recognize the large amount of complexity, uncertainty and ambiguity relates to actual real-world situations.
6. Distinguish which concepts are appropriate to what industry.
7. Analyse different entry modes for carrying out international business.
8. Manage business dealings in a cross-cultural context business, both in developed and emerging economies.
9. Make use of financing instruments and institutions important to international business.
10. Identify key accounting, tax and legal issues in a variety of countries.
11. Deal effectively with co-workers, organized labour, suppliers, customers and various levels of governments in a variety of international settings.

Revised On: January 31, 2024

Schulich School of Business

IBUS4200 F2023 CREDITS: 3.00

IBUS 4200 A - INTEGRATIVE INTERNATIONAL BUSINESS SEMINAR

MON 14:30-17:30 SSB W256

INSTRUCTOR

Atipol Supapol

asupapol@schulich.yorku.ca

416.736.2100 Ext. 77932

N205L SSB

ADMIN

Domenica Lam

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N205B SSB

Professor Atipol Bhanich Supapol has been teaching at the Schulich School of Business since 1989. He was previously country chief and head of corporate finance for NatWest Securities Asia (Thailand), a subsidiary of NatWest Bank, UK., and director and VP of PricewaterhouseCoopers Securities (PwC Securities) in New York, responsible for corporate debt restructuring and cross-border M&A.

BRIEF DESCRIPTION

By exposure to senior executives operating in international business, who will be presenting seminars, and by actual visits to actual businesses, students will be able to see how real-life situations are dealt with, and what skills and mind-set are required to be successful in international business. Prerequisite or Corequisite: SB/IBUS 3200 3.00. Note: Preference will be given to students enrolled in the Certificate in International Management.

COURSE LEARNING OUTCOMES

The key learning objective of this course is for the student to be able to integrate and apply concepts and skills they will have acquired in the Certificate Program, as well as in their other courses. The seminar/practicum will continue the process of creating the mind-set necessary to operate effectively in international business so that when employed in the field, he or she can "hit the ground running." Considerable attention will be paid to how various industries exhibit similarities and differences in the way international business is conducted. There will a series of speakers and two site visits to real life international business operations.

The student will be able to:

1. Assimilate the examples brought by business executives, other experts and colleagues as well as their own observations in actual business establishments.
2. Engage in reflection.
3. Recognize the large amount of complexity, uncertainty and ambiguity relates to actual real-world situations.
4. Distinguish which concepts are appropriate to what industry.
5. Analyse different entry modes for carrying out international business.
6. Manage business dealings in a cross-cultural context business, both in developed and emerging economies.

7. Make use of financing instruments and institutions important to international business.
8. Identify key accounting, tax and legal issues in a variety of countries.
9. Deal effectively with co-workers, organized labour, suppliers, customers and various levels of governments in a variety of international settings.

Students must arrive punctually. They also may not eat while a speaker is present. At all times, they must show their name card so that is legible and visible from afar. We have a fantastic line-up of speakers! This course is clearly a unique opportunity. However, the degree of ultimate success of the seminar depends a lot upon the participation and enthusiasm of the students.

COURSE MATERIAL

There is no textbook; however, readings will be assigned for each class.

General Reference: J. Daniels, L. Radebaugh, D. Sullivan. International Business, 16th edition, Pearson, 2017.

Students should be reading a current affairs periodical regularly focussing on International Business such as the Economist, the Financial Times, the New York Times or the Globe and Mail (business section).

An inexpensive digital subscription to the Economist is available for ($12 for 12 weeks). **https://subscription.economist.com/DA/PPC/ALLALLRDCD/ALL (https://subscription.economist.com/DA/PPC/ALLALLRDCD/ALL)** ?

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Introductions 0%			
Briefing Note 5%			
Briefing Note (1)		0.63%	Mon Sep 25, 2023 at 02:30pm EDT
Briefing Note (2)		0.63%	Mon Oct 2, 2023 at 02:30pm EDT
Briefing Note (3) Ryan Rowe		0.63%	Mon Oct 16, 2023 at 02:30pm EDT
Briefing Note (4) George Abonyi		0.63%	Mon Oct 23, 2023 at 02:30pm EDT
Briefing Note (5) Michael Sasarman		0.63%	Mon Oct 30, 2023 at 02:30pm EDT
Briefing Note 6 Lt. Gen (ret.) Andrew Leslie		0.63%	Mon Nov 6, 2023 at 02:30pm EST
Briefing Note (7) Dr. Theo Peridis		0.63%	Mon Nov 20, 2023 at 02:30pm EST
Briefing Note (8) Dr. Minerva Cernea		0.63%	Mon Nov 27, 2023 at 02:30pm EST
Discussion & Review 10%			
Discussion & Peer Review (1)		2%	Fri Sep 22, 2023 at 10:00am EDT
Discussion & Peer Review (2)		2%	Fri Oct 6, 2023 at 10:00am EDT
Discussion & Peer Review (3)		2%	Fri Oct 20, 2023 at 10:00am EDT
Discussion & Peer Review (4)		2%	Thu Nov 30, 2023 at 10:00pm EST
Discussion & Peer Review (5)		2%	Mon Dec 4, 2023 at 10:00pm EST
Topic Paper 20%			
Individual Assignment		20%	Mon Oct 30, 2023 at 02:30pm EDT

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Reflective Journal Entries 20%			
Reflective Journal		20%	Tue Dec 12, 2023 at 05:30pm EST
International Business Scenario Analysis - Group Major Project 35%			
International Business Scenario Analysis		35%	Mon Dec 4, 2023 at 02:30pm EST
Participation 10%			
Participation		10%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Briefing Note (1)

Due Date: Mon Sep 25, 2023 at 02:30pm EDT

Briefing Note (2)

Due Date: Mon Oct 2, 2023 at 02:30pm EDT

Briefing Note (3) Ryan Rowe

Due Date: Mon Oct 16, 2023 at 02:30pm EDT

Briefing Note (4) George Abonyi

Due Date: Mon Oct 23, 2023 at 02:30pm EDT

Briefing Note (5) Michael Sasarman

Due Date: Mon Oct 30, 2023 at 02:30pm EDT

Briefing Note 6 Lt. Gen (ret.) Andrew Leslie

Due Date: Mon Nov 6, 2023 at 02:30pm EST

Briefing Note (7) Dr. Theo Peridis

Due Date: Mon Nov 20, 2023 at 02:30pm EST

Briefing Note (8) Dr. Minerva Cernea

Due Date: Mon Nov 27, 2023 at 02:30pm EST

Discussion & Peer Review (1)

Due Date: Fri Sep 22, 2023 at 10:00am EDT

Discussion & Peer Review 1

Topic

We discussed the importance of "**Multinational Enterprise**" and the concept of "**subsidiaries, technology transfer, and performance**." Select a news article that relates to some important aspect of the topic discussed in Classes 1&2 and contribute with a discussion post here (supply citation and link).

Additional Instructions

- Immediately after the assignment comes due, you will receive a classmate's discussion post for peer review. (Note: You will be automatically assigned a discussion post for peer review only if you have submitted your own discussion post on time.) You are to read their discussion post and comment on the insights (one peer review per student). **The peer review is due within 48 hours of receiving the peer assignment.**
- Your contribution should be 250 words maximum for the initial post and 250 words for the peer review. You should provide the link and complete citation to any online source used.
- **Graded discussions with peer review are graded as follows:** 2 points for discussion and peer review; 1 point for discussion only; and 0 for no discussion (you cannot be assigned a peer review unless you have completed the discussion).
- In addition to the grading described above, I will be monitoring this activity on an ongoing basis for **quality**, **clarity**, and **professionalism.**

Discussion & Peer Review (2)

Due Date: Fri Oct 6, 2023 at 10:00am EDT

Discussion & Peer Review 2

Topic

We discussed the importance of "**Firm-Specific Advantage (FAS)**" and issues related to "**International Technology**

Transfer." Select a news article that relates to some important aspect of the topic discussed in class and contribute with a discussion post here (supply citation and link).

Additional Instructions

- Immediately after the assignment comes due, you will receive a classmate's discussion post for peer review. (Note: You will be automatically assigned a discussion post for peer review only if you have submitted your own discussion post on time.) You are to read their discussion post and comment on the insights (one peer review per student). **The peer review is due within 48 hours of receiving the peer assignment.**
- Your contribution should be 250 words maximum for the initial post and 250 words for the peer review. You should provide the link and complete citation to any online source used.
- **Graded discussions with peer review are graded as follows:** 2 points for discussion and peer review; 1 point for discussion only; and 0 for no discussion (you cannot be assigned a peer review unless you have completed the discussion).
- In addition to the grading described above, I will be monitoring this activity on an ongoing basis for **quality**, **clarity**, and **professionalism.**

Discussion & Peer Review (3)

Due Date: Fri Oct 20, 2023 at 10:00am EDT

Topic: International Business in a Failed State: Geopolitical Challenges and International Management

Select a news article that relates to some important aspect of the topic discussed in Class and contribute with a discussion post here (supply citation and link).

Additional Instructions

- Immediately after the assignment comes due, you will receive a classmate's discussion post for peer review. (Note: You will be automatically assigned a discussion post for peer review only if you have submitted your own discussion post on time.) You are to read their discussion post and comment on the insights (one peer review per student). **The peer review is due within 48 hours of receiving the peer assignment.**
- Your contribution should be 250 words maximum for the initial post and 250 words for the peer review. You should provide the link and complete citation to any online source used.
- **Graded discussions with peer review are graded as follows:** 2 points for discussion and peer review; 1 point for discussion only; and 0 for no discussion (you cannot be assigned a peer review unless you have completed the discussion).
- In addition to the grading described above, I will be monitoring this activity on an ongoing basis for **quality**, **clarity**, and **professionalism.**

Points
2

Discussion & Peer Review (4)

Due Date: Thu Nov 30, 2023 at 10:00pm EST

Topic: "International Business: European Union and the Middle East - Navigating the New Energy Landscape"

Select a news article that relates to some important aspect of the topic discussed in Class and contribute with a discussion post here (supply citation and link).

Additional Instructions

- Immediately after the assignment comes due, you will receive a classmate's discussion post for peer review. (Note: You will be automatically assigned a discussion post for peer review only if you have submitted your own discussion post on time.) You are to read their discussion post and comment on the insights (one peer review per student). **The peer review is due within 48 hours of receiving the peer assignment.**
- Your contribution should be 250 words maximum for the initial post and 250 words for the peer review. You should provide the link and complete citation to any online source used.
- **Graded discussions with peer review are graded as follows:** 2 points for discussion and peer review; 1 point for discussion only; and 0 for no discussion (you cannot be assigned a peer review unless you have completed the discussion).
- In addition to the grading described above, I will be monitoring this activity on an ongoing basis for **quality**, **clarity**, and **professionalism.**

Points
2

Discussion & Peer Review (5)

Due Date: Mon Dec 4, 2023 at 10:00pm EST

Topic: "International Business: Challenges for International Professionals Coming to Canada"

E.g **https://www.theglobeandmail.com/business/commentary/article-canadian-experience-requirements-are-not-just-discriminatory-they-harm/?utm_medium=email&utm_source=Top%20Business%20Headlines%20Morning%20Edition&utm_content=2023-
%20they%20harm%20the%20economy&utm_campaign=newsletter&cu_id=8SilRAHe%2BDk2E5cieFTniA%3D%3**
**(https://www.theglobeandmail.com/business/commentary/article-canadian-experience-requirements-are-not-just-discriminatory-they-harm/?utm_medium=email&utm_source=Top%20Business%20Headlines%20Morning%20Edition&utm_content=2023-11-25_7&utm_
%20they%20harm%20the%20economy&utm_campaign=newsletter&cu_id=8SilRAHe%2BDk2E5cieFTniA%3D%3D)**

Select a news article that relates to some important aspect of the topic discussed in Class and contribute with a discussion post here (supply citation and link).

Additional Instructions

- Immediately after the assignment comes due, you will receive a classmate's discussion post for peer review. (Note: You will be automatically assigned a discussion post for peer review only if you have submitted your own discussion post on time.) You are to read their discussion post and comment on the insights (one peer review per student). **The peer review is due within 48 hours of receiving the peer assignment.**
- Your contribution should be 250 words maximum for the initial post and 250 words for the peer review. You should provide the link and complete citation to any online source used.
- **Graded discussions with peer review are graded as follows:** 2 points for discussion and peer review; 1 point for discussion only; and 0 for no discussion (you cannot be assigned a peer review unless you have completed the discussion).
- In addition to the grading described above, I will be monitoring this activity on an ongoing basis for **quality**, **clarity**, and **professionalism.**

Points
2

Individual Assignment

Due Date: Mon Oct 30, 2023 at 02:30pm EDT

Given their size, global market reach, and political influence, MNEs are well-positioned to tackle more complex global problems such as *global warming and climate change*. Societies, governments, and multilateral institutions such as the United Nations and the World Bank increasingly expect MNEs and their subsidiaries to introduce and adhere to more responsible corporate practices and contribute positively to solving climate problems. There is now a resounding call for MNEs to take a positive role in addressing climate change by improving their environmental standards, lowering carbon emissions, and fostering a greater circular economy in their global supply chains.

Write a paper (roughly 2000 words (double spaced, Times New Roman 12), and provide complete references) addressing: (1) MNEs' changing global carbon footprint, and (2) different local regulations and industrial policies (select an emerging Southeast Asian country or an emerging economy of your choice from Africa) motivating MNEs to positively tackle the problem of climate change.

Reflective Journal

Due Date: Tue Dec 12, 2023 at 05:30pm EST

The Journals (2 pages, 11 pt. Times Roman, double spaced, in point form done at least for five of the guest speakers). Each entry should have the following components:

1. A discussion of what you thought were the key takeaways from the class. What did you learn?
2. A discussion of how the speaker's story and the ensuing in-class discussion related to your interests or industry/ career choice. Students will be expected to do some research on their chosen industry.

In addition, write an additional 2 to 3 pages in full sentences and paragraphs discussing common themes in the speakers talks and the similarities and differences among the speakers' stories and why these similarities or differences might exist. These additional pages should be in full sentences and paragraphs and should:

- Elaborate on the two questions above above from the perspective of the course as a whole.
- Discuss how the sessions covered in your journal have contributed to your understanding of managing in the context of an international business.
- Discuss how the course has encouraged you to think about your career options and the path towards fulfilling your international business goals.

International Business Scenario Analysis

Due Date: Mon Dec 4, 2023 at 02:30pm EST

International Business Scenario Analysis

Students will work in groups of 4 to 5 to analyse an international business scenario. The list of scenarios is given below. Groups will choose one scenario from the list and decide among themselves what approach they will take to analyse their chosen scenario. Additional assumptions about the firm and its external environment will be necessary to make the project manageable. The project will take considerable creativity and brain storming.

Groups will be required to submit a 2-page progress report to the instructor during the last week of November.

For the last class, each group will make a 15 minute presentation of their analysis of their scenario, which will be followed by 10 minutes of Q&A. The presentations must utilize no more than TEN clear, logical and succinct PowerPoint slides. A hard copy of the presentation (plus appendices and a complete bibliography) must be provided to the instructor in advance of the presentation.

Group Project

Suggested Topics/Scenarios (1-10 are more general and the remaining are more specific)

1. The impact of Global Urbanization and Smart Cities on International Business. You may wish to focus on a particular region or industry (e.g., retailers or financial institutions).
2. Climate change and its implications on the Canadian Environmental Technology sector.
3. Unbanked and Underbanked: What roles do digital Financial Institutions play? (Pick a region: Asia, Latin America, Europe, or Africa).
4. International Integrated Production and Global Value Chains, e.g. Tesla's decision to go global.
5. What were the challenges for UBER in entering the Asian market: why did it work or why didn't it work?
6. How have Supply-Chain problems affected Canadian food retailers and food manufacturers? How can future problems be avoided?
7. Global Infrastructure Development: What implications are there for Canadian companies going global? (Pick a region: Asia, Latin America, Europe or Africa).
8. A Canadian manufacturer of machinery parts decides to move its plant from Canada to Mexico.
9. A Canadian manufacturer of LRT systems wishes to sell these transportation systems to European cities.
10. A Canadian mining company has made significant investments over the past decade in a host nation that is now facing sanctions from several of the firm's important customer nations because the host nation is intervening in the internal politics of one of its neighbours.
11. A Canadian consumer electronics firm has developed a product suited to the demands of consumers in sub-Saharan Africa, but lacks knowledge about these markets.
12. A large Asian based shipping company wants to use the Northwest Passage to speed the passage from the Pacific Ocean to the Atlantic Ocean in northern waters.
13. A Canadian mining company wishes to develop a gold mine in South Africa.
14. A Canadian high tech firm is importing a key input part from a company whose production plant in Thailand has been seriously impaired by extreme flooding.
15. A Canadian bank decides to purchase a major local bank in Argentina.
16. A Canadian SME has developed a unique consumer product. It realizes that the Canadian market is too small so it needs to export to foreign markets to be efficient.
17. **A scenario of your own design** (***subject to my approval, and please send me your group's decision as soon as possible***).

Participation

Grades will be based on the quality, not the quantity of students' participation. To facilitate participation, students should prepare thoroughly for class. Briefing notes include potential questions to ask each speaker.

(At all times, student name cards must be displayed!)

GRADING SCHEME

CLASS-BY-CLASS SYLLABUS

September 11th - Introduction to the course: International Management

Sep 11/23

Overview: Introduction to the Course

Introduction to the course: International Management: Managing Across Borders and Cultures.

Weeks 1 and 2: Introduction & International Business Framework

Weeks 3-11: Speakers and **one** site visit (Date to be determined)

Week 12: Group oral presentations and wrap-up

Over the course, students will be exposed to international business executives, industrial practitioners, and international legal specialists. Students will have an opportunity to see how to apply concepts and skills they have learned in the Certificate Program. Not only will the students get exposure to key industry decision-makers, they will be able to feel the enthusiasm each has for steering a dynamic enterprise. The speaker series will be supplemented with discussions of assigned articles and topical issues.

IBUS 4200 Introduction:
IBUS 4200 Introduction (https://www.youtube.com/watch?v=Vh57Rhy0q7Y&ab_channel=AfreenMiah)

(https://www.youtube.com/watch?v=Vh57Rhy0q7Y&ab_channel=AfreenMiah)

Kanna, Tarun. "Contextual Intelligence," Harvard Business Review. September 2014.

September 25th - Visiting Speaker - Richard Ross -Inmet Chair in Global Mining Management; Director, Global Mining Management

October 2nd -Visiting Speaker - Douglas Kennedy – RBC Managing Director - Global Enterprise Initiative

Oct 2/23

Overview: Visiting Speaker - Douglas Kennedy , RBC Managing Director, CGE – Doing business in Asia (with a special focus on Japan) - 13 years as an investment banker at Morgan Stanley and Credit Suisse followed by seven years as an institutional investor

General

- **http://www.oecd.org/economy/japan-economic-snapshot/ (http://www.oecd.org/economy/japan-economic-snapshot/)** (Economic Forecast Summary (June 2020) and Reform Priorities (July 2019)
- **https://data.worldbank.org/country/JP (https://data.worldbank.org/country/JP)** (Trend statistics on demography and economy)
- **https://www.weforum.org/agenda/2019/02/is-japan-s-sun-rising (https://www.weforum.org/agenda/2019/02/is-japan-s-sun-rising)** (decent short overview of economic, social, geopolitical issues facing Japan)
- **The Kyoto craftsman keeping his family's 144-year-old legacy alive by hand | Remarkable Living (https://www.youtube.com/watch?v=YrME5IRPwEs)**

(https://www.youtube.com/watch?v=YrME5IRPwEs)
or
https://youtu.be/RCtICNBU_I8?list=PLrV_BP5Fb2nHjABJ9jF06LhpR9VSCmKGb (https://youtu.be/RCtICNBU_I8?list=PLrV_BP5Fb2nHjABJ9jF06LhpR9VSCmKGb)

(https://youtu.be/RCtICNBU_I8?list=PLrV_BP5Fb2nHjABJ9jF06LhpR9VSCmKGb)
(Japanese social/cultural perspectives relating to quality, attention to detail, process)

Background

- **https://owlcation.com/humanities/Japanese-History-Summary (https://owlcation.com/humanities/Japanese-History-Summary)** (Focus on section 11 – 15)
- **https://hbr.org/1981/01/behind-japans-success (https://hbr.org/1981/01/behind-japans-success)** (traditional western view of Japanese business culture and the Japanese 'miracle')

Business Culture

- **https://www.euro-japan.de/media/Understanding-Japanese-Business-Culture.pdf (https://www.euro-japan.de/media/Understanding-Japanese-Business-Culture.pdf)**
- **https://www.jetro.go.jp/costarica/mercadeo/communicationwith.pdf (https://**

www.jetro.go.jp/costarica/mercadeo/communicationwith.pdf)

October 16th - Visiting Speaker - Ryan Rowe

- ROWE_CV_Oct2022.pdf
- Ancona 2011 - Sensemaking - Framing and acting in the unknown.pdf
- Cochrane et al 2017 - Profits are to be made in failed states but at what cost.pdf
- DINEPA 2023 - Haiti WASH Advocacy Brief.pdf
- Haims et al - Breaking the Failed State Cycle.pdf
- Tissera Luna 2023 - Decolonizing aid.pdf

October 23th - George Abonyi - Zoom

- GA - bio note .docx
- 2023 - McKinsey - Asia Business Council - strategies-for-asian-business-navigating-a-new-era-vf.pdf
- 2023 - Economist - The overstretched CEO.pdf
- 2023 - The Nation - Thai enterprises need to approach strategy differently in a turbulent world - 11 Aug.pdf
- REG_AREO-2023-October-Update-Report_Oct-4.pdf

October 30th - Michael Sasarman

- M Sasarman pdf - International Business - 2023oct30v2.0.pdf

November 6th - Lt. Gen (Ret) Andrew Leslie

- The Next Chapter in China's Consumer Story
- Revisiting the China Opportunity

November 15th - Hugh Bowman (Lecture & Site visit) - CEO Global Citrus Group Inc.

November 20th - Dr. Theo Peridis

- Theodore Peridis - Bio.doc
- Tom Standage's ten trends to watch in 2024.pdf
- What markets are trying to tell Europe—and why it should listen.pdf
- Which EU country is winning our economic pentathlon .pdf

November 27 - Dr. Minerva Cernea

- BIO_Dr. Minerva Cernea[59].pdf
- Effective Global Leadership Requires a Global Mindset.pdf
- The personal quest for building global competence- A taxonomy of self-initiating career path strategies for gaining business experience abroad.pdf
- Presentation Minerva Cernea_Nov 21 2023.pptx

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Class Participation (contribution)

Grades will be based on the quality, not the quantity of students' participation. To facilitate participation, students should prepare thoroughly for class. Briefing notes include potential questions to ask each speaker.

(At all times, student name cards must be displayed!)

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 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/ (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.

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.*

Deliverables

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

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

To: Faculty Council, Schulich School of Business
From: Preet Aulakh, Strategic Management and International Business
Date: March 14, 2024
Re: Undergraduate Core Program Changes – SB/MGMT 1030 3.00 – History of Capitalism to be retired and replaced with SB/MGMT 1035 3.00 - Global Business: Past, Present, Future

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MOTION:

To propose that Faculty Council approve the retirement of SB/MGMT 1030 3.00 – History of Capitalism as a core course in the first year of the undergraduate program and replace it with SB/MGMT 1035 3.00 - Global Business: Past, Present, Future.

RATIONALE:

This new course significantly enriches and enhances the core curriculum by introducing key aspects of global business practices. While the course retains the historical and case-based lens of the one it replaces (MGMT 1030, *History of Capitalism*), it offers layers of contemporary global perspectives on business. With the removal of the iBBA stream, the program is tasked with finding ways to embed Global Business into the BBA curriculum, consistent with the evolving Program Learning Outcomes. This course lays important foundations for a better understanding of global business practices by introducing its key aspects: globalization and multinational enterprises, international trade and institutions; key industries to study global dynamics such as global finance and textiles. The course will equip all undergraduate students with a better understanding of the evolving global business environment and of global business practices. This is a component that is missing from the current curriculum.

Schulich School of Business
York University

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:**
   BBA Program

2. **Responsible Unit:**
   MGMT

3. **Subject Code (Rubric) and Course Number:**
   SB/MGMT 1030

4. **Credit Value:**
   3.00

5. **Long Course Title:**
   History of Capitalism: Structures, Agents, Artefacts

6. **Short Course Title:**
   History of Capitalism

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):**

Schulich School of Business
York University

Fall 2024

9. Rationale:

SB/MGMT 1030 3.00 will no longer be available to students as a core course in the first year of the undergraduate program. This course will be replaced with SB/MGMT 1035 3.00 Global Business – Past, Present, Future

10. Proposed Course Information:

N/A

Existing Course Information (Change From):	**Proposed Course Information (Change To):**
~~History of Capitalism: Structures, Agents, Artefacts~~	N/A

11. Enrolment Notes:

N/A

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.

Schulich
School of Business
York University

Originator:

Preet S. Aulakh	March 12, 2024
Signature	Date
Preet S. Aulakh	SGMT
Name	Area or Specialization
Matthias Kipping	March 12, 2024
Signature	Date
Matthias Kipping	SGMT/EMBA
Name	Area or Specialization
Farrokh Zandi	March 12, 2024
Signature	Date
Farrokh Zandi	ECON/IBUS
Name	Area or Specialization
Andrew Thomson	March 12, 2024
Signature	Date
Andrew Thomson(Adjunct Faculty)	SGMT
Name	Area or Specialization

Approvals:

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

Schulich School of Business
York University

Signature	Date
n/a	
Name	Area or Specialization

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

Burkard Eberlein	March 12, 2024
Signature	Date
Burkard Eberlein	BBA Program
Name of Program Director	Program

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Irene Henriques, Professor and Area Coordinator Economics
Date: March 15, 2024
Re: SB/ECON 2000 3.00 Course retirement

Motion: Approve the retirement of SB/ECON 2000 3.00 – Applied Macroeconomics as a core BBA course effective Fall 2025-Winter 2026

Rationale:
With the introduction of the following newly designed BBA core courses: SB/ECON 1000 'Microeconomics for Managers' and SB/ECON 1010 'Macroeconomics for Managers', the Economics Area has agreed to retire ECON 2000 as a core BBA course.

Schulich
School of Business
York University

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:**
   BBA

2. **Responsible Unit:**
   ECON

3. **Subject Code (Rubric) and Course Number:**
   ECON 2000

4. **Credit Value:**
   3.00

5. **Long Course Title:**
   Applied Macroeconomics

6. **Short Course Title:**

Applied Macroeconomics

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)**

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

9. Rationale:

With the introduction of the following newly designed BBA core courses: SB/ECON 1000 'Microeconomics for Managers' and SB/ECON 1010 'Macroeconomics for Managers', the Economics Area has agreed to retire ECON 2000 as a core BBA course.

10. Proposed Course Information:
NA

11. Enrolment Notes:
NA

12. Consultation:
NA

Originator:

Signature	March 15, 2024 Date
Irene Henriques Name	Area Coordinator Economics Area or Specialization

Approvals:

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

Signature	March 15, 2024 Date
Irene Henriques Name	Area Coordinator Economics Area or Specialization

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA Program
Name of Program Director	Program

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Pauline Shum Nolan, Professor of Finance and Area Coordinator
Date: March 12, 2024
Re: New Course Proposal: FINE4280 Fintech: Digital Transformation of Financial Services

---

Motion: That Faculty Council approves the proposal for the above course.

Rationale: This course, with its focus on the intersection of finance and technology, has minimal overlap with existing courses. Since the entire finance industry is being transformed by technology, this course provides core knowledge for students who wish to pursue a career in innovations in financial services, whether they aspire to work in product/project management, or digital strategy. This course is also ideal for entrepreneurial students interested in joining the vibrant startup community at Schulich. The finance area has not introduced any new courses in a long time, and this course helps refresh the curriculum.

Schulich
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York University

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 BBA Program

2. Responsible Unit:
FINE

3. Subject Code (Rubric) and Course Number:
FINE4280

4. Credit Value:
3.00

5. Long Course Title:
Fintech: Digital Transformation of Financial Services

6. Short Course Title:
Fintech

7. Effective Term/Calendar Year:
Fall 2024

8. Language of Instruction:
English

9. Calendar (Short) Course Description:
This is the description of the course as it will appear in the University course repository and related publications. Calendar (short) course descriptions should be written in the present tense and may be a maximum of 60 words. ***Please include information with respect to any pre-/co-requisites and/or cross-listing or integration in the course description****.*

This course is designed for students interested in how technology is transforming the financial services industry. The course begins with an analysis of the Fintech ecosystem,

and then dives into the various Fintech verticals, pain points and solutions, applications of emerging technologies, startup financing and valuation, and cryptocurrencies. In the capstone project, students learn to develop their own fintech business.

Prerequisite: FINE2000; corequisite: FINE3100 or FINE3200

10. Expanded Course Description:

This is the detailed course description that will be published in course outlines, program handbooks, etc. Expand upon the short description in order to give academic approval committees a full and clear sense of the aims and objectives of the course and the types of materials it will cover.

This course is designed for business students interested in how technology is transforming the financial services industry. In this course, you will study the different verticals in the fintech ecosystem, the current landscape, pain points and solutions, applications of emerging technologies such as AI, startup financing, fintech valuation, cloud computing, blockchain and cryptocurrencies, responses from incumbents and big tech, and open banking. In the capstone project, you and your group will design and develop a fintech business.

11. Course Learning Outcomes:

(Necessary for Quality Assurance approval and cyclical program reviews)
What will students be able to do upon completion of this course specifically?

Upon completion of the course, students will have a solid understanding of the fintech industry, including the different verticals within the Fintech ecosystem, sources of financing and exit, challenges of consumers, small businesses, startups and incumbents, technology adoption and applications of AI, and regulatory issues such as open banking and cryptocurrencies. For the capstone project, students will develop the idea and the business model for their own Fintech start-up, which can then be used in pitch competitions and hackathons. This course will help prepare students interested in a career related to innovations in financial services or private equity/venture capital with a Fintech focus. Critical thinking skills in evaluating where the industry should focus going forward and understanding how finance in the digital age can promote financial inclusion and equity, are also important learning outcomes. Current government regulations/debates will also be emphasized.

12. Rationale:

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

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Additionally, please append the program's existing learning outcomes as a separate document.

This course, with its focus on the intersection of finance and technology, has minimal overlap with existing courses. Since the entire finance industry is being transformed by technology, this course provides core knowledge for students who wish to pursue a career in innovations in financial services, whether they aspire to work in product/project management, or digital strategy. This course is also ideal for entrepreneurial students interested in joining the vibrant startup community at Schulich. The finance area has not introduced any new courses in a long time, and this course helps refresh the curriculum.

13. Evaluation:

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

Assignment 1	Individual	15%
Assignment 2	Individual	15%
Test	Individual	25%
Capstone Project Group		40%
- Pitch deck		
- Demo deck		
Class participation	Individual	5%

14. Integrated Courses:

N/A

15. Cross-listed Courses:

N/A

16. Enrolment Notes:

N/A

17. Faculty Resources:

Pauline Shum Nolan

18. Physical Resources:

N/A

19. Bibliography and Library Statement:

Please provide an appropriate and up-to-date bibliography in standard format. A statement

from the University librarian responsible for the subject area certifying that adequate library resources are available for the new course must be provided.

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

20. Instructors and Faculty Coordinator

Initial instructor:
Pauline Shum Nolan

Alternative instructors:
Pejman Zameni (currently teaching Fintech for the Master of Finance)

Course coordinator:
Pauline Shum Nolan

21. Specializations

Primary area or specialization:
Finance

Secondary areas or specializations:
N/A

22. Student Contact and Enrolment

Contact hours:
3 hours of classroom

Maximum enrolment:
45

Expected enrolment:
40-45 Steady state

Evidence for enrolment expectations:
Finance has not introduced a new elective in a long time. This course will help refresh the curriculum. Digital transformation / strategy in financial services is a necessary evolution amongst incumbents and challengers. Therefore, this course is highly relevant for the job market. Many of our BBA graduates have also gone the entrepreneurial route and started their own technology business, joining the vibrant Schulich startup

community. In sum, this course will attract students interested in a financial services career or entrepreneurship.

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

a. Financial inclusion / access is a major thesis of fintech.
b. This course highlights how financial services, through the use of technology, can contribute to equity and inclusion.

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.
Due to the expected retirement of a part-time instructor, the Area will not be offering his existing three-credit elective course (it has low enrolment), after the academic year 24/25.

b) Provide a convincing case for the proposed course.
Currently, the Schulich BBA programme does not have any courses on the intersection of finance and technology, yet digital transformation is one of the most important strategic initiatives in the financial services industry.

Originator:

	March 12, 2024
Signature	Date
Pauline Shum Nolan	Finance
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.

Henry Kim	*OMIS*
Melanie Cao	*Finance*
Pouyan Foroughi	*Finance*
Yisong Tian	*Finance*
Murat Kristal	*OMIS*
Irene Henriques	*Econ*

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.

(Unanimous support from the Finance Area) March 13, 2024

Signature Date

Pauline Shum Nolan Finance

Name of Coordinator or Director Area or Specialization

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

Burkard Eberlein March 22, 2024

Signature Date

Burkard Eberlein BBA/iBBA Program

Name of Program Director Program

V. July 2021

Schulich
School of Business
York University

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.

Burkard Eberlein	March 22, 2024
Signature	Date
~~Burkard EberLein~~	~~BBA/iBBA Program Committee~~
Name of Committee Chair	Committee

FINE4280 3.0: Fintech

Fintech: Digital Transformation of Financial Services

Course Outline
Fall 2024

Tuesdays, 11:30-14:30
Class location: TBA

Instructor
Professor Pauline Shum Nolan, PhD
N222, Seymour Schulich Building
416-736-5072
pshum@schulich.yorku.ca
Office hours: after class or by appointment

Assistant
TBA

TBA

Dr. Shum Nolan is Professor of Finance at the Schulich School. She had served as the founding Director of the Master of Finance, as well as the Director of the PhD programme. Dr. Shum Nolan has won prestigious awards for her research, including the Toronto CFA Society Hillsdale Award twice. She is also the Founder of Wealthscope, a FinTech company specializing in data-driven portfolio and retirement planning analysis.

Brief Description
This course is designed for students interested in how technology is transforming the financial services industry. The course begins with an analysis of the Fintech ecosystem, and then dives into the various Fintech verticals, pain points and solutions, applications of emerging technologies, startup financing and valuation, and cryptocurrencies. In the capstone project, students learn to develop their own fintech business.

Prerequisite: FINE2000; corequisite: FINE3100 or FINE3200

Contents

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Course Learning Outcomes

Upon completion of the course, students will have a solid understanding of the fintech industry, including the different verticals within the Fintech ecosystem, sources of financing and exit, challenges of consumers, small businesses, startups and incumbents, technology adoption and applications of AI, and regulatory issues such as open banking and cryptocurrencies. For the capstone project, students will develop an idea and the business model for their own Fintech start-up, which can then be used in pitch competitions and hackathons. This course will help prepare students interested in a career related to innovations in financial services or venture capital with a Fintech focus. Critical thinking skills in evaluating where the industry should focus going forward and understanding how finance in the digital age can promote financial inclusion and equity, are also important learning outcomes. Current government regulations/debates will also be emphasized.

Deliverables at a Glance

Assignment/Task	Quantity	% Weight	Total %	Author
Assignment 1	1	15	15	Individual
Assignment 2	1	15	15	Individual
Test	1	25	25	Individual
Capstone Project	1	40	40	Group
Class participation		5	5	Individual
			100%	

For details, see “Written Assignments/Projects and Exam.

Course Material

Required reading for this course includes the following book. It is available for purchase from the York University Bookstore (http://bookstore.blog.yorku.ca), and available as an ebook through the Libraries’ collection with unlimited access at:
https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036786601005164

Fintech Explained: How Technology is Transforming Financial Services by Michael R. King, U of T Press, 2023

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.

Timely readings will be added to the course CANVAS.

Student Preparation for Class and Class Participation: Expectations

Preparation. To do well in the course, students should i) prepare for and attend every class, ii) keep up with the assigned readings and research, and iii) meet the milestones for the capstone project, to be outlined in class.

Class Participation. Participation marks will be awarded based on class attendance (no exceptions), contribution to class discussions based on assigned readings, informed opinions, constructive comments, and promoting a great learning experience and classroom environment for all.

Value: 5%

Class-by-Class Syllabus

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

Week 1 What is Fintech; Fintech Business Models

Curriculum and expectations
The Fintech ecosystem and stakeholders
The current landscape
How incumbents are responding
Digital strategies of incumbents
Fintech business strategies and models

Primary reading(s):
K: Chapters 1, 2
https://learn.marsdd.com/article/business-model-design/

Week 2 Financial Pain Points; Wealth Tech

Consumer and business pain points in financial services
Open Banking and data aggregation
DIY investors
Robo advisors
Customizing personal Finance, investment and retirement planning
Advisor tech

Primary reading(s):
K: Chapter 8
https://www.canada.ca/en/financial-consumer-agency/services/banking/open-banking.html
https://wealthica.com/blog/td-scotiabank-and-cibc-login/

Week 3 Pain Point Presentations

Assignment Due:
- Assignment 1 to be uploaded prior to Canvas

Week 4 Digital Banking

Pain points of customers
The disruption challenger banks seek
Unbundling and rebundling of services
Consumer adoption and the roadmap
Response of incumbents
Regulations

Primary reading:
K: Chapter 10

Week 5 Alternative Finance: Online Lending and Crowdfunding

P2P finance, equity, inclusion
Credit scores
Lending tech
Point-of-sale (POS) lending
Equity crowdfunding

Primary Reading:
K: Chapter 7

Week 6 Applications of AI: Large-Language Models and Prompt Engineering

The evolution of AI
Machine learning vs deep learning
Large-language models
Prompt engineering
Financial services applications

https://www.deeplearning.ai/short-courses/chatgpt-prompt-engineering-for-developers/

Week 7 Blockchains and Cryptocurrencies

What are blockchains and how do they work?
Encryption: public / private keys, hashing
Cryptocurrencies: origin, growth, fraud
Consensus mechanisms; hard fork
Decentralized finance
Government responses

Primary readings:
K: Chapters 5
Dr. Melanie Rieback's video on blockchain security:
https://m.youtube.com/watch?v=jkqT-_gFdNY

Assignment Due:
- Assignment 2 to be uploaded prior to Canvas

Week 8 Financing a Fintech and Fintech Valuation

Fundraising for Fintechs
Ownership dilution
Terms, clauses, and cap tables
Exit strategies
Valuation fundamentals
How to value a young tech firm

Primary readings:
K: Chapters 3 and 4

Week 9 Payment Tech; Big Tech

Evolution of payment systems
Cross-border payments: pain points and solutions
The threat of big tech entering financial services

Primary readings:
K: Chapters 9 and 11

Week 10 Cloud Computing Infrastructure; Test

Cloud computing providers and services
Infrastructure as a Service (IaaS)
Platform as a Service (PaaS)
Software as a Service (SaaS)

A basic tech stack

Primary reading:
Non-technical introduction by Accenture: What is cloud computing?
https://www.accenture.com/ca-en/cloud/insights/cloud-computing

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Week 11 Pitch Day

Assignment Due:
- Pitch deck to be uploaded prior to Canvas

Week 12 Demo Day

Assignment Due:
- Demo pdf or recording to be uploaded prior to Canvas

Written Assignments/Projects and Exam: Descriptions

Due Date

Week 3 Assignment 1

Consumer or Business Pain Point

Research and select a pain point experienced by consumers or by businesses in the financial services industry. Explain what the pain point is and discuss how it could be addressed by today's technology. If there had been recent attempts to address it, discuss how a specific solution provider (must be domiciled in Canada or in the U.S) helps solve the pain point.

Page limit: Two slides (all in). Time limit: 5 minutes

Marks are awarded to:
1) today's relevance of the pain point; 2) clarity of the content and critical thinking; 3) slide design and presentation; and 4) performance in the Q&A.

Late assignments will not be accepted.
Value: 15%

Week 7 Assignment 2

Prompt Engineering for Financial Services

Submit a prompt engineering idea that can be of value to a financial services firm. Include your prompts and a sample response. Discuss the limitations as well as the value of using an LLM for this task. Page limit: 2. A short appendix (not longer than the main text) is allowed.

Due Date

The main text of the report should be self-contained, and professionally written for your "manager".

Late assignments will not be accepted. Please submit in pdf format.
Value: 15%

Weeks 11 & 12

Capstone Project

Develop your own Fintech idea and business. Present a pitch using the guidelines here: https://guykawasaki.com/the_102030_rule/
(or summarized here:) https://learn.marsdd.com/article/how-to-create-a-pitch-deck-for-investors/
Mock-up of your technology (using fake data is fine and there is no need to build a backend). The mock-up can be done using a wireframe software such as Figma.

There are two deliverables: a pitch deck and a demo deck. Below are the guidelines for grading:

Pitch (out of 20)

Is the core business idea clear and convincing? Does it make sense as a business?	4
Do you have appropriate/informative content on the slides?	4
Slide design	3
All stats referenced?	1
Are you persuasive and effective during the presentation?	4
Are you able to answer questions well during the Q&A?	4

Demo (out of 20)

Does the overall setup suit your product/service?	4
Is the UI clean and effective?	4
Does the user flow make sense for a pleasant UX?	4
Is the demo smooth and informative?	4
Are you able to answer questions well during the Q&A?	4

All members of the group are responsible for presenting and answering questions from the audience. Individuals who do not present will not receive the presentation marks.

Late submissions will not be accepted.
Value: 40%

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, 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 also be found on **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://cds.info.yorku.ca/.

Test (Absence from)

Students who miss a test must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file.

http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf

Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Title and Date	Topic(s)	Reading Preparation	Written Preparation
1. What is Fintech; Fintech Business Models	Fintech ecosystem and stakeholders; the current landscape; incumbents' response and digital strategies; Fintech business models	K: Chapters 1, 2 Business model reading	
2. Financial Pain Points; Wealth Tech	Consumer and business pain points; open banking and data aggregation; robo advisors; Advisor-tech	K: Chapter 8 Open banking reading	
3. Student Presentations	Consumer/Business Pain Points and Solutions		Upload assignment 1 to Canvas
4. Digital Banking	The disruption challenger banks seek; consumer adoption and the roadmap; incumbent responses and regulations	K: Chapter 10	
5. Alternative Finance: Online Lending and Crowdfunding	P2P finance, equity & inclusion; credit scores; lending tech point-of-sales lending; equity crowdfunding	K: Chapter 7	
6. Applications of AI: Large Language Models and Prompt Engineering	The evolution of AI; machine learning vs deep learning; LLMs & prompt engineering	Complete at least two modules of the prompt engineering material	

Class No., Title and Date	Topic(s)	Reading Preparation	Written Preparation
7. Blockchains and Cryptocurrencies	What are blockchains; cryptocurrencies: origin, growth, fraud; governments' responses	K: Chapters 5	Upload assignment 2 to Canvas
8. Financing a Fintech and Fintech Valuation	Fundraising; terms, clauses, and cap tables; exit strategies; valuation fundamentals; how to value a young tech firm	K: Chapters 3 and 4	
9. Payment Tech; Big Tech	Evolution of payment systems Cross-border payments; threat of big tech in financial services		K: Chapters 9 and 11
10. Cloud Computing Infrastructure; Test	Cloud providers; IaaS, PaaS, SaaS; basic tech stack	Accenture: What is cloud computing?	
11. Pitch Day			Upload pitch deck to Canvas
12. Demo Day			Upload demo deck to Canvas

MEMORANDUM

York University Libraries

To: Pauline Shum Nolan, Professor, Finance Area, Schulich School of Business

From: Xuemei Li, Data Services Librarian, Open Scholarship Department

Date: March 15th, 2024

Subject: Library Statement - FINE 4280 3.0 Fintech: Digital Transformation of Financial Services

Summary

York University Libraries (YUL) is well positioned to support this proposed course which is designed for students interested in how technology is transforming the financial services industry. The course begins with an analysis of the Fintech ecosystem, and then dives into the various Fintech verticals, pain points and solutions, applications of emerging technologies, startup financing and valuation, and cryptocurrencies. In the capstone project, students learn to develop their own fintech business. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings in the business collections 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 gaps. Tailored purchasing profiles ensure new materials are regularly purchased on subjects related to this course such as:

- Financial service industry – Information technology, Banks and banking – Information technology, Crowd funding, Fintech, Entrepreneurship, Start-up, Cryptocurrencies, and Blockchains etc.

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

The required textbook for this course is available as an ebook in the Libraries' collection, and readings (include free web resources) will be posted on Canvas. It is recommended that the instructor use the Copyright Office's

Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the content to be used in a course. Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings, and the A-Z Business Databases list focuses specifically on business-related databases.

Business & Technology Publication Databases:

- Proquest Business
- Business Source Complete
- ACM Digital Library
- IEEE Xplore
- Engineering Village
- Scholars Portal Journals
- JSTOR

Newspaper Databases:

- Factiva
- Nexis Uni
- Canadian Business & Current Affairs
- Canadian Major Dailies

Key Company and Industry Research Databases:

- Gartner Intraweb
- Mergent Online
- Capital IQ
- IBISworld
- FitchConnect
- Marketline Advantage
- Passport
- Statista

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.

Relevant Guides & Online Tutorials of Interest:

- Artificial Intelligence Guide
- Information Technology Guide
- Finance Research Guide
- Business Plans Guide
- Industry Research Guide
- Company Research Guide
- OMNI Search Guide

- Finding Business Articles Guide
- Business Citation Guide
- Step-by-Step Business Database Tutorials

Research Help

Online research assistance is available in both English and French via chat and email. Drop-in reference service is also available at the Bronfman Business Library Monday to Friday. 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.

Schulich
School of Business
York University

Schulich School of Business Memorandum

To: BBA Program Committee, Schulich School of Business

From: Willow Sheremata, Strategic Management Area Coordinator

Date: March 14, 2024

Re: New Course Proposal – SGMT 4350 3.0 International Business Simulation

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Motion:

SGMT 4350 3.0 International Business Simulation

Rationale:

This course is a strategic management elective for the BBA program, which focuses on international business and strategic management in a global context. The school's undergraduate program is weak in international business content, which this new elective will provide. It is taught through simulation pedagogy, which students find enjoyable and stimulating. Since students work in groups on dynamic and changing scenarios, this course also provides experiential learning. It adopts the same grading and course delivery structure as two core courses which have recently been retired, MGMT 4100 and INTL 4300. This structure has proven quite effective in achieving learning outcomes. These courses were also popular because students found the simulation pedagogy enjoyable. Therefore, we expect courses using this pedagogy will be highly enrolled while addressing gaps in our undergraduate curriculum: the need for more international and global business content and more experiential learning.

In summary, this course offers a unique and effective learning experience to students, while delivering international business content that students need in the global context in which businesses operate today.

Schulich
School of Business
York University

New Course Proposal Form
Schulich School of Business

1. Responsible Program:
BBA Program

2. Responsible Unit:
Strategic Management

3. Subject Code (Rubric) and Course Number:
SGMT 4350

4. Credit Value:
3.00

5. Long Course Title: International Business Simulation

6. Short Course Title: International Business Simulation

7. Effective Term/Calendar Year: Fall 2024

8. Language of Instruction: English

9. Calendar (Short) Course Description:

Managing a multinational firm operating in several foreign markets is a complex undertaking. Managers in charge of multinational firms need to possess the ability to evaluate the potential of foreign markets, select appropriate market entry modes, pursue sound strategic positionings adopted to specificities of each market, and manage complex global value chains. In this course, students will use cutting-edge international business simulation software to experience the management of a multinational firm in a dynamic competitive environment.

Note: Students must take SB/SGMT 3000 3.0 or SB/INTL 3000 3.0 prior to or concurrently with SB/SGMT 4350 3.0

10. Expanded Course Description:

The purpose of this course is to develop your ability to successfully manage a firm present in several foreign markets (i.e., a multinational firm) through multiple years of operations. The course elaborates on the main issues facing managers in charge of multinational firms of various types, although in the main, the focus rests on profit-

oriented multinational firms operating in a competitive global environment. The main topics explored in this course include:

- Multistakeholder perspective on the role and importance of international business.
- Factors impacting international trade.
- Analytical tools employed to assess the potential of foreign markets.
- Characteristics of the world's main economies.
- Merits and risks of various foreign market entry modes.
- Trade-offs inherent in the selection of international strategies.
- Management of global value chains.
- Management of global research and development activities.
- Management of global talent.
- Complexities arising at the intersection of multinational firm-level cultures, national-level cultures, and international business ethics.

11. Course Learning Outcomes:

By use of the business simulation method, you will be placed in charge of a multinational firm. In your role, you will apply the concepts of international business in a simulated real-world environment. In doing so you will refine your ability to:

- Acquire essential knowledge related to the management of a multinational firm in a global competitive environment.
- Implement strategic plans and create firm-specific course of action.
- Understand overall interaction and impact of various parts of a business on one another.
- Strengthen practical skills and confidence when working with pricing models, production schedules, and financial statements.
- Hone problem-solving capabilities.
- Increase awareness of ethical issues resulting from business decisions.
- Develop leadership and teamwork skills to successfully guide the team to success
- Use written and oral communication effectively.

12. Rationale:

This course is a strategic management elective for the BBA program, which focuses on international business and strategic management in a global context. The school's undergraduate program is weak in international business content, which this new elective will provide. It is taught through simulation pedagogy, which students find enjoyable and stimulating. Since students work in groups on dynamic and changing scenarios, this course also provides experiential learning. It adopts the same grading and course delivery structure as two core courses which have recently been retired, MGMT 4100 and INTL 4300. This structure has proven quite effective in achieving

learning outcomes. These courses were also popular because students found the simulation pedagogy enjoyable. Therefore, we expect courses using this pedagogy will be highly enrolled while addressing gaps in our undergraduate curriculum: the need for more international and global business content and more experiential learning.

In summary, this course offers a unique and effective learning experience to students, while delivering international business content that students need in the global context in which businesses operate today.

13. Evaluation:

Assignment/Task	Weight %	Author
Class Participation	10%	Individual
Case Analysis	20%	Individual
Midterm Examination	30%	Individual
Simulation Exercise	25%	Group
End of Simulation Report & Presentation	15%	Group
	100%	

Note that the group component is higher than a typical elective because this is a simulation course. Group work is an indispensable major component in this pedagogy.

14. Integrated Courses: N/A

15. Cross-listed Courses: N/A

16. Enrolment Notes: N/A

17. Faculty Resources:

Zdenek Necas, Adjunct Professor, Strategic Management
Preet Aulakh, Professor Strategic Management

18. Physical Resources:

A regular class- or seminar room with standard A/V equipment is required. In addition, one or two breakout rooms for consultations with groups is desirable but not absolutely necessary.

19. Bibliography and Library Statement:

Attached.

MEMORANDUM

York University Libraries

To: Willow Sheremata, Coordinator, Strategic Management Area, Schulich School of Business

From: Sophie Bury, Teaching & Learning Librarian, Student Learning & Academic Success

Date: March 4th, 2024

Subject: Library Statement of Support – SGMT 4350 3.0 International Business Simulation

Summary

York University Libraries (YUL) is well positioned to support this proposed course, to form an elective in the iBBA/BBA program, with a focus on international business content, and replacing a former Strategic Management Course INTL 4300. It will give students the foundation needed to pursue second-year courses in strategic management. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings in the business collections related to the major theme of the course, i.e., the management of multinational firms across foreign markets to be explored using the business simulation method.

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 gaps. Tailored purchasing profiles ensure new materials are regularly purchased on subjects related to this course such as:

- **International Business Enterprises – Management, Global Value Chain, Export Competitiveness, International Economics and Trade, Competitive Advantage (International Trade).**

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

It is noted that the required textbook for this course is an open textbook which the students can freely download, while the business simulation software to be used will be available to each of them on payment of a registration fee. Course projects include a case study analysis and a business simulation exercise.

Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings, and the A-Z Business Databases list focuses specifically on business-related databases.

Business Scholarly & Trade Publication Databases:

- Proquest Business Complete
- Business Source Complete

Newspaper/ Magazine Databases:

- Factiva
- Nexis Uni
- Press Reader

Key Market & Industry Research Databases with International Coverage: These subscription databases offer detailed industry, product, and market research reports, as well as industry, consumer and market data for multiple countries. They would be useful for researching foreign markets potential:

- FitchConnect
- Marketline Advantage
- IBISworld

- Passport
- Statista

Key International Trade, Economies & Countries Research Databases:
These subscription databases include country reports and business and/or economics statistics/data and would be useful for investigating business or economic climates worldwide:

- OECD iLibrary
- World Bank e-Library
- Europa World
- IMD World Competitiveness Yearbook
- Marketline Advantage
- FitchConnect
- Passport
- Statista

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 & Online Tutorials of Interest:

- Country & International Business Guide
- Market Research Guide
- Data & Statistics Guide
- Business Citation Guide
- Step-by-Step Business Database Tutorials

Research Help

Online research assistance is available in both English and French via chat and email. Drop-in reference service is also available at the Bronfman Business Library Monday to Friday. 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.

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York University

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

20. Instructors and Faculty Coordinator

Initial instructor:
Zdenek Necas

Alternative instructors:
Preet Aulakh

Course coordinator:
Preet Aulakh

21. Specializations

Primary area or specialization:
Strategic Management

Secondary areas or specializations:
This course could be added to a future specialization in International Business if that is developed and approved.

22. Student Contact and Enrolment

Contact hours:
36

Maximum enrolment:
45

Expected enrolment:
45

Evidence for enrolment expectations:

This elective course has completely different content, however it uses the same grading and course delivery structure as MGMT 4100 and INTL 4300, which have been retired. These courses were very popular even though they were required and part of the core.

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Student evaluations were positive over approximately 13 sections per year. Therefore, we anticipate one section to be full, and there could be demand for an additional section in the future. This is one of very few courses in the school which use simulation pedagogy, which is popular with students. We also do not offer many electives (if any) focusing on international business. This is the only elective of its kind being offered from the Strategic Management area. Finally, we only have two strategic management electives that are currently offered so we believe demand will be strong. There is very little competition from other strategic management electives.

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

Equity, diversity, and inclusion will be reflected in readings, materials and delivery to ensure everyone is included and diverse perspectives are valued and respected. The nature of the course—international business—easily lends itself to serious consideration of these issues since many regions and nations are dealing with the legacy of colonization as well as the challenges of decolonization and indigenization. Students must be knowledgeable about this history and these issues when doing business in an international and global context. Hence this course is a valuable addition to the BBA curriculum.

24. **Human Participants Research** N/A

25. Conditions for Approval

The BBA program has very little international business content, which students need to succeed in the global context of business today.

The Strategic Management area will only be offering two electives next year, because we cannot find an instructor to teach one of the three currently on the books. However, all three of our electives have had healthy enrollment over the past several years. Because we offer such a small number of electives, and the content of this course is quite distinct, we do not anticipate competition among them. The content is also distinct from any other course offered in the school, so we do not anticipate competition from other electives.

Originator:

Willow Sheremata	March 9, 2024
Signature	Date
Willow Sheremata	Strategic Management

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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.

Preet Aulakh	*Strategic Management*
Matthias Kipping	*Strategic Management*
Theo Peridis	*Strategic Management*
Majid Mazjoubi	*Strategic Management*
Henry Kim	*OMIS*
Linda Thorne	*Accounting*
Pauline Shum	*Finance*
Eileen Fischer	*Marketing*
Irene Henriques	*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.

Willow Sheremata	March 9, 2024
Signature	Date

Willow Sheremata	Strategic Management
Name of Coordinator or Director	Area or Specialization

Schulich
School of Business
York University

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Programs
Name of Program Director	Program

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

SGMT4350: International Business Simulation

New Course Proposal

Instructor

Zdenek Necas
N309, Seymour Schulich Building
znecas@schulich.yorku.ca

Course Administrative Secretary
Stephanie Allen
sallen@schulich.yorku.ca

Brief Description
Managing a multinational firm operating in several foreign markets is a complex undertaking. Managers in charge of multinational firms need to possess the ability to evaluate the potential of foreign markets, select appropriate market entry modes, pursue sound strategic positionings adopted to specificities of each market, and manage complex global value chains. In this course, students will use cutting-edge international business simulation software to experience the management of a multinational firm in a dynamic competitive environment.

Note: Students must take SB/SGMT 3000 3.0 or SB/INTL 3000 3.0 prior to or concurrently with SB/SGMT 4350 3.0.

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Course Learning Outcomes

The purpose of this course is to develop your ability to successfully manage a firm present in several foreign markets (i.e., a multinational firm) through multiple years of operations. The course elaborates on the main issues facing managers in charge of multinational firms of various types, although in the main, the focus rests on profit-oriented multinational firms operating in a competitive global environment. The main topics explored in this course include:

- Multistakeholder perspective on the role and importance of international business.
- Factors impacting international trade.
- Analytical tools employed to assess the potential of foreign markets.
- Characteristics of the world's main economies.
- Merits and risks of various foreign market entry modes.
- Trade-offs inherent in the selection of international strategies.
- Management of global value chains.
- Management of global research and development activities.
- Management of global talent.
- Complexities arising at the intersection of multinational firm-level cultures, national-level cultures, and international business ethics.

By use of the business simulation method, you will be placed in charge of a multinational firm. In your role, you will apply the concepts of international business in a simulated real-world environment. In doing so you will refine your ability to:

- Acquire essential knowledge related to the management of a multinational firm in a global competitive environment.
- Implement strategic plans and create firm-specific course of action.
- Understand overall interaction and impact of various parts of a business on one another.
- Strengthen practical skills and confidence when working with pricing models, production schedules, and financial statements.
- Hone problem-solving capabilities.
- Increase awareness of ethical issues resulting from business decisions.
- Develop leadership and teamwork skills to successfully guide the team to success.
- Use written and oral communication effectively.

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	Weight %	Author
Class Participation	10%	Individual
Case Analysis	20%	Individual
Midterm Examination	30%	Individual
Simulation Exercise	25%	Group
End of Simulation Report & Presentation	15%	Group
	100%	

Course Material

Required materials for this course include the following textbook and business simulation software.

International Business, Authors: Carpenter and Dunung, ISBN 13: 9781453312995, Publisher: Saylor Foundation 2011.

The textbook is available as a free download at https://open.umn.edu/opentextbooks/textbooks/72

GlobalDNA International Business Simulation.

Students need to register for the business simulation game at https://ww5.capsim.com/registrationapp/agree and pay the registration fee of US$53.99.

Student Preparation for Class and Class Participation: Expectations

Preparation

This course offers students a unique business simulation experience which is output oriented and highly integrative. To do well, students must draw on what they have learned in many other business courses.

Students will be assigned to several teams through a process determined by the instructor. Each team will be responsible for managing a virtual company for 8 simulated years (1 week= 1 year). Before the actual simulation begins, teams will run 4 rounds of practice simulation to become more familiar with the business simulation software.

The simulation requires each team to utilize the skills of (1) leadership, (2) organizational ability, (3) strategic analysis, (4) financial planning, (5) market forecasting, (6) communication, and (7) independent thinking.

During the sessions, instructor will discuss international business concepts and issues as per the topics list, explain the basics of the simulation, review results, and answer questions. Students are expected to spend considerable time outside class meetings to strategize, make decisions, and manage the company.

When the instructor requests to debrief with a team, attendance at the meeting is mandatory. Note that the role of the instructor with these sessions is to facilitate individual thinking and not to provide specific decisions.

Class Participation
Students are expected to attend all sessions and engage effectively in class discussions. Display of name tags is mandatory in all sessions.

PARTICIPATION: GRADING CRITERIA - The following descriptions represent a continuum of participation for grading purposes.

Outstanding Contributor – 80%-100% - Contributions in class represent exceptional preparation. Ideas offered are always substantive and consistently provide several major insights as well as a direction for the class. Arguments, when offered, are well substantiated and persuasively presented. If this person were not a member of the class, the quality of the discussion would be significantly diminished.

Good Contributor – 70%-79% - Contributions in class represent thorough preparation. Ideas offered usually are substantive, provide good insights, and sometimes provide direction for the class. Arguments, when offered, are generally well substantiated and are often persuasively presented. If this person were not a member of the class, the quality of the discussion would be considerably diminished.

Adequate Contributor – 60-69% - Contributions in class represent satisfactory preparation. Ideas offered are sometimes substantive, provide generally useful insights, but seldom offer direction for the class. Arguments, when offered, are fairly well substantiated and are sometimes persuasive. If this person were not a member of the class, the quality of the discussion would be diminished somewhat.

Unsatisfactory Contributor – 0-59% - Contributions in class represent inadequate preparation. Ideas offered are seldom substantive, provide few, if any, insights, and never give a constructive direction for the class. Integrative arguments and effective comments are never presented. Class contributions are, at best, "cherry picking" efforts making isolated, obvious, or confusing points. If this person were not a member of the class, valuable air time would be saved.

Nonparticipant – 0% - This person has said little of nothing in this class to date. Hence, there is no basis for evaluation. If this person were not a member of the class, the quality of the discussion would be unchanged.

Class-by-Class Syllabus

Topics, readings, and business simulation related preparation & tasks for every class are listed below.

Class 1 **AN INTRODUCTION TO INTERNATIONAL BUSINESS AND THE SIMULATION**

In this introductory class, we consider the role of international business from the perspective of various stakeholders. We also introduce the GlobalDNA international business simulation game.

Read:

Textbook: Chapter 1.

Business simulation:

Register for the GlobalDNA international business simulation game at https://ww5.capsim.com/registrationapp/agree

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Class 2 **INTERNATIONAL TRADE**

In our second class, we extend our discussion on the role of international business to examine different perspectives on factors that impact the cross-border exchange of different kinds.

Read:

Textbook: Chapter 2.
https://www.oxfordreference.com/display/10.1093/oi/authority.20110819140656269
https://www.oecd-ilibrary.org/trade/international-trade/indicator-group/english_20cce8d6-en
https://www.census.gov/foreign-trade/reference/definitions/index.html

Business simulation:

Study Manager's Guide, Global DNA Department Guide, and Market Conditions.

Class 3 **INTERNATIONAL EXPANSION AND GLOBAL MARKET OPPORTUNITY ASSESSEMENT**

In our third class, we develop tools to analyze the potential of foreign markets.

Read:

Textbook: Chapter 8. (skip section "8.3 International-Expansion Entry Modes").

Business simulation:

Complete Practice Rounds 1&2.

Class 4 **WORLD ECONOMIES**

In our fourth class, we survey main markets on each continent in terms of their sizes, growth rates, main industries, and developmental stages.

Read:

Textbook: Chapter 4.

Porter, M. E. (1996). Competitive advantage, agglomeration economies, and regional policy. International regional science review, 19(1-2), 85-90. [YUL].

https://cepr.org/system/files/publication-files/181996-nation_building_big_lessons_from_successes_and_failures.pdf (Read the Foreword only).

Business simulation:

Complete Practice Rounds 3&4.

Class 5 **FOREIGN MARKET ENTRY MODES**

In our fifth class, we examine merits and risks of the entire spectrum of entry modes ranging from simple exporting to the establishment of wholly owned subsidiaries.

Read:

Textbook: Chapter 8 (section "8.3 International-Expansion Entry Modes" only) & Chapter 9.

Business simulation:

Complete Simulation Round 1.

Attend consulting sessions with professor.

Class 6 **INTERNATIONAL STRATEGIES**

In our sixth class, we explore issues related to the formulation of sound international strategies adopted to intricacies of foreign markets.

Read:

Textbook: Chapter 10.

Business simulation:

Complete Simulation Round 2.

Attend consulting sessions with professor.

READING WEEK

Class 7 **MIDTERM EXAMINATION**

Business simulation:
Complete Simulation Round 3.
Attend consulting sessions with professor.

Class 8 **GLOBAL VALUE CHAIN MANAGEMENT**
In our eighth class, we examine the complexities related to the creation, configuration, and maintenance of global value chains with focus on sourcing and procurement, conversion, logistics, and marketing.

Read:
Textbook: Chapter 14.

Business simulation:
Complete Simulation Round 4.
Attend consulting sessions with professor.

Class 9 **GLOBAL INNOVATION MANAGEMENT**
In our ninth session, we study issues related to sourcing, organizing, and leveraging global R&D (Research and Development) activities.

Read:
Textbook: Chapter 13.

Business simulation:
Complete Simulation Round 5.
Attend consulting sessions with professor.

Class 10 **GLOBAL TALENT MANAGEMENT**
In our tenth class, we explore the complex process of identifying, hiring, training, controlling, motivating, and retaining top global talent.

Read:
Textbook: Chapter 12.

Business simulation:
Complete Simulation Round 6.
Attend consulting sessions with professor.

Class 11 **CULTURE, ETHICS, AND INTERNATIONAL BUSINESS**

In our penultimate class, we examine the complex relationship among a multinational firm's culture, national cultures, and international business ethics.

Read:
Textbook: Chapter 3.

Business simulation:
Complete Simulation Rounds 7. & 8.

Class 12 **PRESENTATIONS**

Assignments: Descriptions

Due Date

Class 12 **Simulation Exercise**

Each student needs to register online at http://www.capsim.com and pay for the simulation fee. Select the industry [TBA]. Instructor will constitute the groups using random assignment.

Students are expected to go online, download the student guide and relevant reports and familiarize themselves with the simulation.

Each student needs to complete the online rehearsal/tutorial individually before starting the group practice. Students who do not complete the tutorial might lose up to 5 points of the exercise grade.

There will be 4 practice rounds (not graded) over two weeks to help students better grasp the concepts of the simulation and master the variables. During practice weeks, each group has to create a vision and mission and choose a competitive strategy for their company in the actual simulation.

Once practice rounds are completed, the simulation will be reset and groups can start the actual simulation. There will be 1 round per week in weeks 5. to 10. and 2 final rounds between 10. and 11. sessions for a total of 8 rounds (there will be no round scheduled during the Reading Week). Decisions will be made outside class meetings.

The grades will be determined using the balanced scorecard tool provided in the simulation in addition to team overall performance and their fulfillment of

Due Date

vision, mission & strategy. Professor can award extra rewards for business acumen, entrepreneurial spirit, and the ability to sustain the business.

The balanced scorecard evaluates each group's decision-making quality across the eight decision making rounds using the following scoring criteria: Financial (i.e., Profit, Return on Assets, Market Cap, Leverage), Internal Business Process (i.e., Contribution Margin, Capacity Utilization, Market Share, Market Share Growth), Customer (i.e., Product Design Score, Awareness, Accessibility, Market Penetration), Learning & Growth (Employee Turnover, Profit/Employee, Market Price/Employee, Sales/Employee).

The simulation is different in each edition of the course. The industrylevel parameters are randomized to provide students with a unique learning environment. The competitive landscape is dynamic and influenced by the effects of the several decision-making teams. Further, the instructor will modify the industry-level conditions through introductions of additional modules and/or shifts in the general environment (e.g., a recession). The optimal responses to these modifications are contingent upon the unique conditions of each specific simulation world and the decisions and trade-offs made by each competing team.

Peer evaluation:

A peer review document will be posted under Module 12. Up to 10 percentage points will be deducted from the individual grade for this assignment should a student engage in free-riding behaviour. There are two outcomes of the peer review process. Outcome A: No free-riding behaviour took place in which case no peer review needs to be submitted. Outcome B: Not all group members agree that everyone contributed equally to this assignment. In such case, each group member needs to send me by e-mail the peer review filled in individually within 24hrs after 12. class.

Class 12 **<u>End of Simulation Report & Presentation</u>**

At the end of the simulation, each group is required to write a report about their simulation experience.

The report and presentation should follow the format of an annual corporate report and meeting. Groups must reflect on their strategic decisions such as creating vision/mission, choice of strategy, etc. Additionally, the group should discuss the challenges they faced in the industry and inside their company and how they overcame them. The more detailed instructions are posted below.

Report:

Due Date

Each team is required to submit a report analyzing their simulation experience and the major learning points.

The report should be well-structured, well-written and professionally compiled (cover page, table of contents, page numbers, executive summary, references if applicable etc.)

Length (excluding cover page, table of contents, executive summary, references, and any other appendices): max 7 pages.

Font: Times New Roman; Size: 12, 2 line spacing; Min. 1 inch margins on all sides.

Deadline: Soft copy uploaded to Canvas before the start of the 12. Class. One copy upload per team is sufficient.

Structure of the report:

1. Introduction of the team and the company's vision and mission;
2. The original strategy of the company;
3. Progress of the company round by round (summary);
4. Modifications to your original strategy and explanation why the original strategy was modified. In case you did not modify your original strategy, discuss why.
5. An alternative course of action if given the chance to repeat the game;
6. Conclusion with final thoughts and what did you learn;
7. Optional: Any relevant suggestions to make the game better.

Presentation:

10-12 minutes maximum followed by a Q&A.

All team members present; it is encouraged that all team members present a section of the presentation, but it is not a requirement.

MS Power Point or equivalent format; please have your presentation saved to a USB stick.

The presentation should provide the audience with an insightful synthesis of the end of simulation report. The structure and formatting of the presentation is up to each team to decide.

The presentations will be ordered alphabetically based on teams' names.

Due Date

Deadline: Soft copy uploaded to Canvas before the start of the 12. Class. One copy upload per team is sufficient.

The grade for this assignment will be based on the evaluation of the end of simulation report. Yet, should the presentation fail to provide the audience with an insightful synthesis of the end of simulation report, the instructor can deduct up to 3 percentage points from the grade for this assignment.

Class 7 **Midterm Exam**

The in-person / closed book midterm exam will cover material from classes 1.-6. It may include a variety of question formats (e.g., multiple choice questions, short-answer questions, a business case accompanied by a few short questions to guide your answers). The instructor may add questions pertaining to simulation as they see fit. More information on the midterm exam will be provided in Session 6.

Class 11 **Case Analysis**

Students will be assigned a business case accompanied by guiding questions. Case analysis questions and instructions will be posted on Canvas shortly after the 10. Class.

Evaluation of Written Assignments/Projects and Exams

All written work is evaluated for (a) careful use of relevant facts, b) rigorous selection and application of pertinent theories, concepts, and frameworks c) generation of insights by leveraging both relevant facts and analytical outputs to offer a novel understanding of the business situation and uncover key interrelationships d) argumentative clarity achieved by logical reasoning e) the quality of writing including formatting, spelling, grammar, organization, and conciseness. It is important to communicate your ideas clearly and concisely, otherwise even the best ideas get undermined because of faulty presentation. Space constraints should help you do this.

All written work will be submitted to TURNITIN, a tool that identifies many different types of plagiarism with a high degree of accuracy. This tool identifies plagiarism within the class as well as external sources such as the Internet. Use of artificial intelligence tools such as large language model–based chatbots (e.g., ChatGPT) is not allowed for any assignments in this course, including the group project. Where credible evidence of academic dishonesty is found, students will be submitted to the disciplinary process of the university.

Calculation of Course Grade

Evaluation of Student Performance

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is D. To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 5.5-7.00.

In this class, students will be assigned a percentage grade for each assignment (e.g., 68%, 73%, 81%). At the end of the semester, the weighted average grade will be translated to letter grade as follows:

A+	90%-100%
A	80%-89%
B+	75%-79%
B	70%-74%
C+	65%-69%
C	60%-64%
D+	55%-59%
D	50%-54%
F	<50%.

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

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/

Exams (Absence from)
Midterm. Students who miss a midterm examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file.

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/

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://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ Links to an external site.

** 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: Preet Aulakh, Strategic Management and International Business
Date: March 14, 2024
Re: Undergraduate Core Program Changes – SB/MGMT 1030 3.00 – History of Capitalism to be retired and replaced with SB/MGMT 1035 3.00 - Global Business: Past, Present, Future

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MOTION:

To propose that Faculty Council approve the retirement of SB/MGMT 1030 3.00 – History of Capitalism as a core course in the first year of the undergraduate program and replace it with SB/MGMT 1035 3.00 - Global Business: Past, Present, Future.

RATIONALE:

This new course significantly enriches and enhances the core curriculum by introducing key aspects of global business practices. While the course retains the historical and case-based lens of the one it replaces (MGMT 1030, *History of Capitalism*), it offers layers of contemporary global perspectives on business. With the removal of the iBBA stream, the program is tasked with finding ways to embed Global Business into the BBA curriculum, consistent with the evolving Program Learning Outcomes. This course lays important foundations for a better understanding of global business practices by introducing its key aspects: globalization and multinational enterprises, international trade and institutions; key industries to study global dynamics such as global finance and textiles. The course will equip all undergraduate students with a better understanding of the evolving global business environment and of global business practices. This is a component that is missing from the current curriculum.

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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 Program

2. Responsible Unit:
MGMT

3. Subject Code (Rubric) and Course Number:
MGMT 1035

4. Credit Value:
3.00

5. Long Course Title:
SB/MGMT 1035 3.00 Global Business – Past, Present, Future

6. Short Course Title:
SB/MGMT 1035 3.00 Global Business – Past, Present, Future

7. Effective Term/Calendar Year:
Fall 2024

8. Language of Instruction:
English

9. Calendar (Short) Course Description:
This blended core course provides students with a deeper understanding of the world they live in. It explores key dimensions of globalization and diverse aspects of an ever-evolving global business environment. It examines historical forces that have shaped organizations, institutions, and stakeholders, their effects on business activities within and across nations in the present, and their implications for the future.
Course Credit Exclusion: SB/MGMT 1030 3.00

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10. Expanded Course Description:

This course delves into the evolution of global business practices, examining how trade, innovation, and power dynamics have shaped the modern global economy. Through a historical lens, students will explore pivotal moments and trends that have influenced the trajectory of international business, from the pre-industrial routes to contemporary multinational corporations. By analyzing case studies, primary sources, and scholarly research, students will gain insights into the interconnectedness of economies, cultures, and technologies across different eras. Topics include the rise of mercantilism, colonialism and its economic legacies, industrialization and the emergence of multinational corporations, globalization, and the digital revolution. Special attention will be given to understanding the role of geopolitics, technology, and cultural exchange in shaping global business strategies.
Course Credit Exclusion: SB/MGMT 1030 3.00

11. Course Learning Outcomes:

- Provide students with a deeper view of the world they live in by examining the historical forces that have shaped global capitalism, with a particular focus on the role of business organizations.
- By the end of the course, students will be able to identify relevant historical forces and to apply an understanding of these forces to their reasoning about the present and future.
- Explain key concepts for analysis of past and present global business contexts.
- Have a critical understanding of shifting power relationships between nations (Global North and the Global South) and their implications for trade and business relationships.
- Apply key concepts in critical analysis of trends in past and present global business contexts.
- Use research skills to develop evidence-supported conclusions about trends in global business.

12. Rationale:

This course significantly enriches and enhances the core curriculum by introducing key aspects of global business practices. While the course retains the historical and case-based lens of the one it replaces (MGMT 1030, *History of Capitalism*), it offers layers of contemporary global perspectives on business. With the removal of the iBBA stream, the program is tasked with finding ways to embed Global Business into the BBA curriculum, consistent with the evolving Program Learning Outcomes. This course lays important foundations for a better understanding of global business practices by introducing its key aspects: globalization and multinational enterprises, international trade and institutions; key industries to study global dynamics such as global finance and textiles. The course will equip all undergraduate students with a better

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understanding of the evolving global business environment and global business practices. This is a component that is missing from the current curriculum.

13. Evaluation:

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
Module completion quizzes (Canvas)	10	3%	30%	Individual
Midterm exam	1	20%	20%	Individual
Group video presentation	1	20%	20%	Group
Final exam	1	30%	30%	Individual
			100%	

14. Integrated Courses:

Not applicable

15. Cross-listed Courses:

Not applicable

16. Enrolment Notes:

Not applicable

17. Faculty Resources:

This new core course will require no additional faculty resources given that it replaces the retiring "History of Capitalism, MGMT 1030 3.00".

18. Physical Resources:

The course does not require any particular resources beyond what is usually required for delivering a core course.

19. Bibliography and Library Statement:

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

20. Instructors and Faculty Coordinator

Initial instructor:

Andrew Thomson, the current instructor of MGMT 1030 (*History of Capitalism*)

Alternative instructors:
Preet S. Aulakh, Farrokh Zandi, Theodore Tolias.

Course coordinator:
Preet Aulakh

21. Specializations

Primary area or specialization:
International Business

Secondary areas or specializations:

22. Student Contact and Enrolment

Contact hours:
36 hours of asynchronous lectures and tutorials. The lecture component of the course is delivered asynchronously via online modules except for Week 1 which will be delivered in person. There will be weekly interactive tutorials (approx. 75 students per tutorial of 90 minutes) that will be delivered in person.

Maximum enrolment:

Expected enrolment:

280 students per section for a total of 560 students

Evidence for enrolment expectations:
This is a core course. All undergraduate students must take this course. The approximate intake for Fall 2024 is 560 students.

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

Equity, diversity, and inclusion will be reflected in readings, materials, and selected case studies. The nature of the course – global business in a historical and contemporary perspective – lends itself to exposing students to a non-Western-centric view of the legacy of colonization. The course will introduce the role of colonialism in the emergence of early multinational enterprises, discuss the historic and current relationship between the Global North and Global South, and highlight facets of global business that are often ignored, such as Black entrepreneurship in the early 20th century. The delivery, both through online modules and interactive discussion in tutorials - will ensure that everyone is included, and diverse perspectives are valued and respected.
With its strong focus on the colonial legacy, globalization and North-South dynamics, this course directly contributes to students' learning about equity, diversity, inclusion, and decolonization.

24. Human Participants Research

Not applicable

25. Conditions for Approval

a) The Area is deleting courses with at least the same total number of credits.
Not applicable

b) Provide a convincing case for the proposed course.
Not applicable

Originator:

Preet S. Aulakh	March 12, 2024
Signature	Date
Preet S. Aulakh	SGMT
Name	Area or Specialization
Matthias Kipping	March 12, 2024
Signature	Date

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Farrokh Zandi	March 12, 2024
Signature	Date
Farrokh Zandi	ECON/IBUS
Name	Area or Specialization
Andrew Thomson (Adjunct Faculty)	March 12, 2024
Signature	Date
Andrew Thomson	SGMT
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.

Ashwin Joshi	MKTG
Eileen Fischer	MKTG
Yuval Deutsch	SGMT
Kee-Hong Bae	FINE
Linda Thorne	ACTG
Murat Kristal	OMIS

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Kevin Tasa ORGS

Mike Valente MKTG

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

N/A
Name of Coordinator or Director Area or Specialization

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

Burkard Eberlein March 22, 2024
Signature Date

Burkard Eberlein BBA Program
Name of Program Director Program

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

Burkard Eberlein March 22, 2024
Signature Date

V. July 2021

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Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

MGMT 1035 - 3.00: Global Business – Past, Present, Future

Instructor
Andrew Thomson
athomson@schulich.yorku.ca
N203H SSB
Office hours: By appointment

Assistant
Stephanie Allen
N305A-SSB
416-736-2100 x66125
sallen@schulich.yorku.ca

Andrew Thomson has a PhD in Canadian history from the University of Waterloo. He has written about craftsmen and entrepreneurs in 19th century Canada, often in the Dictionary of Canadian Biography. In 2011 he published Leadership and Purpose: A History of Wilfrid Laurier University with WLU Press. Course Coordinator, Management 1030 (Business History) at Schulich School of Business since 2012.

Additional instructors: Preet S. Aulakh, Farrokh Zandi, Theodore Tolias

Brief Description

This blended core course provides students with a deeper understanding of the world they live in. It explores key dimensions of globalization and diverse aspects of an ever-evolving global business environment. It examines historical forces that have shaped organizations, institutions, and stakeholders, their effects on business activities within and across nations in the present, and their implications for the future.

Course Credit Exclusion: SB/MGMT 1030 3.00

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Course Learning Outcomes

1. Provide students with a deeper view of the world they live in by examining the historical forces that have shaped global capitalism, with a particular focus on the role of business organizations.

2. By the end of the course, students will be able to identify relevant historical forces and to apply an understanding of these forces to their reasoning about the present and future.
3. Explain key concepts for analysis of past and present global business contexts.
4. Have a critical understanding of shifting power relationships between nations (Global North and the Global South) and their implications for trade and business relationships.
5. Apply key concepts in critical analysis of trends in past and present global business contexts.
6. Use research skills to develop evidence-supported conclusions about trends in global business.

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
Module completion quizzes (Canvas)	10	3%	30%	Individual
Midterm exam	1	20%	20%	Individual
Group video presentation	1	20%	20%	Group
Final exam	1	30%	30%	Individual
			100%	

For details, see "Written Assignments/Projects and Exam: Descriptions" (p. 6&7)

Course Materials

Readings for the course will be provided for each module via Canvas and will be marked as required, recommended or supplementary. There is no required textbook for this course.

The lecture component of the course is delivered asynchronously via online modules except for Week 1 which will be delivered in person. These asynchronous sessions will include video lectures, readings and other content.

The weekly interactive tutorials (approx. 75 students per tutorial of 90 minutes) will be delivered in person. The tutorials will cover and expand on the week's content. The weekly readings for the course are available online, either through the York University library system or simply on the Internet. There is no formal textbook for the course.

Student Preparation for Class and Class Participation: Expectations

Preparation.

Students are expected to review the content of the online modules each week and complete the online quiz, which checks their comprehension of the content assigned that week. Each module forms the core for understanding the topic for the week. A discussion of the readings in the weekly tutorial supplements the online module. Students are expected to have read the readings for the week and to have prepared comments to facilitate discussion.

Class Participation (contribution).

The tutorials will offer an opportunity to discuss both the weekly readings and the online module content. The content of these sessions will be included in the midterm and final exams. Contribution in class includes making intelligent comments, reading the required material, and being prepared to discuss the main issues, etc. You should be ready to comment, debate and contribute to the class discussion. Your participation will make the class a productive learning experience.

Class-by-Class Syllabus

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

Topic	Online Materials	Tutorial Materials	Assessments Due
Week 1 **Introduction and Course Overview**	No online module this week	No tutorials this week	
Week 2 **Globalization** • Globalization from Silk Road to Belt Road • Merchant capitalism and world trade. • Technology of trade, ships, containers, communication. • Opposing globalization	• Brief History of Globalization: WEF (World Economic Forum) https://www.weforum.org/agenda/2019/01/how-globalization-4-0-fits-into-the-history-of-globalization/ • Reimagining Global Integration https://www.project-syndicate.org/commentary/flows-of-services-and-intangibles-shows-globalization-still-alive-by-olivia-white-and-jonathan-woetzel-2023-03	• James McBride, Noah Berman, and Andrew Chatzky. "China's Massive Belt and Road Initiative" Council on Foreign Relations. https://www.cfr.org/backgrounder/chinas-massive-belt-and-road-initiative#chapter-title-0-1.	Online Week 2 Module quiz (3%)
Week 3 **Organizations: Multinational Enterprises (MNEs)** • Early MNEs • Role of colonialism • Modern multinationals	• Multinational Corporation (MNC) https://corporatefinanceinstitute.com/resources/management/multinational-corporation/ • The Significance and Influence of Multinational Corporations on the Global Economy https://ronesans.com/en/news/the-significance-and-influence-of-multinational-corporations-on-the-global-economy	• The East India Company: The First Multinational? https://www.bbc.com/worklife/article/20160330-the-worlds-most-powerful-corporation	Online Week 3 Module quiz (3%)
Week 4 **International Trade**	• Importance of International Trade to the Canadian	▪ The New Industrial Policy: Return to Picking Winners. *The*	Online Week 4 Module quiz (3%)

Topic	Online Materials	Tutorial Materials	Assessments Due
▪ Mercantilism and colonial systems ▪ Modern theories of international trade ▪ Trade liberalization and the Global South	Economy https://www.fraserinstitute.org/sites/default/files/the-importance-of-international-trade-to-the-canadan-economy-an-overview-post.pdf • International Trade Theories. https://www.youtube.com/watch?v=W_upI5crUXc	*Economist*, January 15, 2022: S4-S6.	
Week 5 **Institutions** • Colonial institutions • GATT and WTO • IMF and World Bank • Regional Trading Blocs	• From GATT to WTO https://www.youtube.com/watch?v=rdX3xPSywgU • The IMF and the World Bank: https://www.imf.org/en/About/Factsheets/IMF-at-a-Glance • Regional Trading Agreements and the Trading System https://www.youtube.com/watch?v=yaYD7R2um-U Robert L. Hetzel, Federal Reserve Bank of Richmond, "Launch of the Bretton Woods System" https://www.federalreservehistory.org/essays/bretton-woods-launched	▪ Andre Sapir and Petros C. Mavroidis, "China and the WTO: Two systems meet." CEPR VOX EU, April 2021 https://cepr.org/voxeu/columns/china-and-wto-two-systems-meet ▪ NAFTA https://www.youtube.com/watch?v=v5w1Pw0i1RE	Online Week 5 Module quiz (3%)
Week 6 **Midterm week**	No online module this week	Midterm	IN-CLASS MIDTERM (20%)
	NO CLASS (Reading Week)		
Week 7 **The Alcohol Industry** ▪ The politics of rum: slavery to Bacardi vs. Castro ▪ Globalizing the wine industry ▪ Marketing and branding ▪ Politics and prohibition	▪ After Prohibition https://www.c-span.org/video/?424763-2/politics-prohibition ▪ Andrea Morrison, Roberta Rabellotti , "Gradual catch up and enduring leadership in the global wine industry" *Research Policy* 46 (2017) 417–430 https://www.sciencedirect.com/science/article/abs/pii/S00	Presentation Articles ▪ Public vs. Private: Selling liquor in Ontario and Alberta. Malcom G. Bird, "Alberta's and Ontario's liquor boards: Why such divergent outcomes?" Canadian Public Administration Volume 53, Issue 4 Dec 2010. PP. 509–530. ▪ Julie Bower and David M. Higgins, "Litigation and Lobbying in Support of the Marque: The Scotch Whisky Association, c.	Online Week 7 Module quiz (3%) Group presentations

Topic	Online Materials	Tutorial Materials	Assessments Due
	4873331630141X?via%3Dihub ▪ Buzzkillers: A brief history of the LCBO https://www.tvo.org/article/buzzkillers-a-brief-history-of-the-lcbo	1945-c.1990." Enterprise and Society, Vol. 24. (2023)286-316.	
Week 8 **Travel and Tourism Industries** ▪ The "Grand Tour" and pre-Industrial tourism ▪ Evolving technology: Ships and planes ▪ Club Med and the "all inclusive" experience ▪ Eco-tourism	▪ Clive Irving, "Jumbo: Boeing's 747 Didn't Just Revolutionize Airline Travel, It Changed the World as We Know It", Aviation History vol. 29 issue1. September 2018. http://ezproxy.library.yorku.ca/login?url=https://go.gale.com/ps/i.do?p=AONE&u=yorku_main&id=GALE|A545291906&v=2.1&it=r ▪ Globalization and Culture: The Three H Scenarios. https://www.intechopen.com/chapters/38348	Presentation Articles ▪ Carter A Hunt "Why Latin America Has Embraced Ecotourism." Current History 121, no. 832 (2022): 69-74. ▪ Sara Fieldston "'Our Dollars are Celebrities Abroad': American Tourists, consumption and Power after World War ll," JOURNAL OF TOURISM HISTORY 2019, VOL. 11, NO. 2, 187–207	Online Week 8 Module quiz (3%) Group presentations
Week 9 **Global Finance** ▪ History of Money. ▪ Potosi and colonial silver ▪ The Bank of England and Central Banks ▪ Banks and Banking. ▪ Currency exchange systems	▪ Sandra Kollen Ghizoni, Federal Reserve Bank of Atlanta, "Creation of the Bretton Woods System" https://www.federalreservehistory.org/essays/bretton-woods-created ▪ The International Role of the Euro: European Currency Aspirations are Getting a Boost https://www.economist.com/finance-and-economics/2021/06/24/the-international-role-of-the-euro	▪ Burgeromics: Big Mac Index and Currency Forecasting https://www.economist.com/big-mac-index Presentation Articles ▪ "You can't be a capitalist without capital" The challenges faced by Black entrepreneurs in the first half of the 20th century. Lila MacLellan, "The history of Black management reveals an overlooked form of capitalism", Quartz at Work, qz.com June 18, 2020 https://qz.com/work/1868106/black-business-history-reveals-potent-management-lessons ▪ Evolution of Credit Cards in the American Market.Sean H. Vanatta, "Citibank, Credit Cards, and the Local Politics of National Consumer Finance, 1968–1991",	Online Week 9 Module quiz (3%) Group presentations

Topic	Online Materials	Tutorial Materials	Assessments Due
		Business History Review 90 (Spring 2016)	
Week 10 **Textiles** ▪ Pre-Industrial Cotton EIC etc. ▪ British Industrial Cotton ▪ Slavery ▪ The U.S. Civil War ▪ Globalizing production ▪ Fast Fashion	▪ Evolution of the Textile Industry https://globaledge.msu.edu/blog/post/54481/the-evolution-of-the-textile-industry-se ▪ Why were Indian textiles by the British? ▪ https://timesofindia.indiatimes.com/life-style/fashion/buzz/why-were-indian-textiles-banned-by-the-britishers/articleshow/102659300.cms ▪ Sara Idacavage. "Fashion History Lesson: The origins of fast fashion." Fashionista, June 8, 2016. ▪ https://fashionista.com/2016/06/what-is-fast-fashion	Presentation Articles ▪ Stephanie 0. Crofton, Luis G. Dopico. "Zara-Intidex and the Growth of Fast Fashion" *Essays in Economic & Business History* — Vol XXV, 2007 ▪ Choi, Eugene K., "The Rise of UNIQLO: Leading Paradigm Change In Fashion Business and Distribution in Japan." ▪ *Entreprises et Histoire* 2011, 64 (3): 85–101. (article is in English)	Online Week 10 Module quiz (3%) Group presentations
Week 11 **The Oil Industry** ▪ Kerosene and the origins of oil and gas. ▪ Standard Oil and American Oil ▪ British Petroleum and the Middle East. ▪ Oil as a strategic resource. ▪ OPEC and Oil Shocks. ▪ Fracking and 21st Century Oil. • WTI, Brent, Western Canada Select (WCS)	▪ Evolution of the Oil Industry www.c-span.org/video/?526850-1/evolution-oil-industry-1951 ▪ Not All Oil Is Equal: Explaining Price Differences https://open.alberta.ca/dataset/5e6f425a-e1c7-441a-9aa0-64890e4ecade/resource/b7080f88-f748-45f0-8294-81d32a7a834c/download/13-Explaining-oil-price-differentials-formatted.pdf	▪ Oil And Petroleum Products Explained, Oil Prices And Outlook ▪ https://www.eia.gov/energyexplained/oil-and-petroleum-products/prices-and-outlook.php Presentation Articles ▪ The History of PetroCanada https://www.thecanadianencyclopedia.ca/en/article/petro-canada ▪ The History of British Petroleumhttps://www.referenceforbusiness.com/history2/34/The-British-Petroleum-Company-plc.html	Online Week 11 Module quiz (3%) Group presentations

Topic	Online Materials	Tutorial Materials	Assessments Due
Week 12 The Service Industry ▪ Sectoral compositions of GDP ▪ Outsourcing ▪ Offshoring	▪ Service Industries https://www.theworldcounts.com/economies/sectors/service-sector ▪ M. Johnny Rungtusanatham and David A. Johnston, "Get Ready for the Next Supply Disruption" MIT Sloan Management Review Winter 2023. https://sloanreview.mit.edu/article/get-ready-for-the-next-supply-disruption/	Presentation Articles ▪ Jianmin Tang, and Ari Van Assche. 2017. "Multinationals and Offshoring: Firm-Level Evidence from Canada." Canadian Public Policy 43 (April): S1–14. ▪ Angela Coyle, "Are You in This Country? How "Local" Social Relations Can Limit the "Globalisation" of Customer Services Supply Chains" *Antipode* Volume 42, Issue 2 Mar 2010.	Online Week 12 Module quiz (3%) Group presentations
Pre-exam week?			

Written Assignments/Projects and Exam[s]: Descriptions

Weeks 2-5
Weeks 7-12 **Online module quizzes (10 x 3% = 30 %, individual)**

Students complete the online quiz, which checks their comprehension of the content assigned in the online module for that week. The quizzes will be administered on Canvas.

Week 6 **Mid-term exam (20%, individual)**
1 hour in length, in tutorials.

Exam held on Canvas with multiple-choice or similar questions. The mid-term will cover content and concepts discussed in Weeks 1 to 5 of the course.

Week 7-12 **Group video presentation (20%, group mark)**
Group submission to Canvas prior to tutorial. Groups are expected to lead an in-class discussion after video-presenting an article, 10mins max length.

For this assessment, you will work as a group to construct and present a video presentation in your tutorial in the second half of the course (i.e. Weeks 7-12). The presentation will focus on an assigned article which is relevant to that week's online module content. In the tutorial, you will play the video presentation and then be expected to facilitate a discussion using questions your group has prepared prior.

You will work in groups set in tutorials during the first half of the course. In week 5, your group will be asked to sign up for the week and corresponding article you would like to present on a first come, first served basis.

You will be expected to submit the video file (or a link to the video on a hosting website) prior to your tutorial along with a written copy of the discussion questions. You will receive more information on Canvas about options for creating and editing your video, as well as the discussion format which your tutor will assist you with on the day of presentation.

Final Exam (30%) 90 minutes in length
The final exam, held in the exam period, will focus on material from the second half of the course.

Evaluation of Written Assignments/Projects and Exams

See Individual assignment descriptions.

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

Grading / Calculation of Course Grade

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is 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.

The following conversion from percentages to letter grades will be used in this course:

GRADING SCHEME
A+ 100% to 89.5%
A < 89.5% to 79.5%
B+ < 79.5% to 74.5%
B < 74.5% to 69.5%
C+ < 69.5% to 64.5%
C < 64.5% to 59.5%
D+ < 59.5% to 54.5%
D < 54.5% to 49.5%
F < 49.5% to 0%

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/

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/

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/.

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).

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.

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. and Code of Students Rights and Responsibilities

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. 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/) 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. 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/

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

MEMORANDUM

York University Libraries

To: Andrew Thomson, Strategic Management Area, Schulich School of Business

From: Xuemei Li, Data Services Librarian, Open Scholarship Department

Date: March 13th, 2024

Subject: Library Statement of Support – MGMT 1035 3.0 Global Business – Past, Present, Future

Summary

York University Libraries (YUL) is well positioned to support this proposed blended core undergraduate course that provides students with a deeper understanding of the world they live in. It explores key dimensions of globalization and diverse aspects of an ever-evolving global business environment. It examines historical forces that have shaped organizations, institutions, and stakeholders, their effects on business activities within and across nations in the present, and their implications for the future. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings in the business collections 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 gaps. Tailored purchasing profiles ensure new materials are regularly purchased on subjects related to this course such as:

- Globalization, International Business Enterprises, International Trade, International Economic Relations, International Finance, Free Trade, Business-History

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

It is noted that there is no required textbook for this course, and readings (include videos and various free web resources) will be posted on Canvas. It is recommended that the instructor use the Copyright Office's Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the

content to be used in a course. Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings, and the A-Z Business Databases list focuses specifically on business-related databases.

Business Scholarly & Trade Publication Databases:

- Proquest Business
- Business Source Complete
- Scholars Portal Journals

Newspaper Databases:

- Factiva
- Nexis Uni
- Press Reader

Key Industry Research Databases with International Coverage:

- FitchConnect
- Marketline Advantage
- IBISworld
- Passport
- Statista

Key International Trade, Economies & Countries Research Databases:

- OECD iLibrary
- World Bank e-Library
- Europa World Plus
- Political Risk Yearbook Online
- Global Financial Data
- Marketline Advantage
- FitchConnect
- Passport
- Statista

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.

Relevant Guides & Online Tutorials of Interest:

- Country & International Business Guide
- OMNI Search Guide
- Finding Business Articles Guide
- Business Citation Guide
- Create Permalinks for EResources Guide
- Business History Guide
- Industry Research Guide
- Data & Statistics Guide
- Step-by-Step Business Database Tutorials

Research Help

Online research assistance is available in both English and French via chat and email. Drop-in reference service is also available at the Bronfman Business Library Monday to Friday. 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.

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Irene Henriques, Professor and Area Coordinator Economics
Date: March 15, 2024
Re: SB/ECON 1000 3.00 New Course Proposal

Motion: Approve SB/ECON 1000 3.00 – Microeconomics for Managers

Rationale:
The Schulich School of Business Dean, Associate Dean Academic and BBA director have asked the Economics Area to bring the first-year core microeconomics course ECON 1000 from LAPS to Schulich. We have designed the course ECON 1000 now titled 'Microeconomics for Managers' to have a stronger managerial focus for the benefit of our BBA students.

Updating the ECON 1000 course to 'Microeconomics for Managers' in a blended, large class format is designed to better prepare Schulich BBA students for managerial roles by making microeconomic principles directly relevant to business practice. This strategic shift enhances learning through flexibility and engagement, aiming to improve the BBA program's appeal and effectiveness.

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York University

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 BBA Program

2. Responsible Unit:
ECON

3. Subject Code (Rubric) and Course Number:
ECON 1000

4. Credit Value:
3.00

5. Long Course Title:
Microeconomics for Managers

6. Short Course Title:
Microeconomics for Managers

7. Effective Term/Calendar Year:
Fall 2024

8. Language of Instruction:
English

9. Calendar (Short) Course 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.

Course Credit Exclusions: AP/ECON 1000 3.00, GL/ECON 2500 3.00 [prior to Fall 2014] and SB/INTL 1200 3.00

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10. Expanded Course Description:

The key objective of this course is to introduce and familiarize students with the main ideas, concepts, tools and techniques of microeconomics so that they can identify, understand and evaluate the dynamics of domestic and global market forces which, in interaction with government policy, affect business operations and consumer welfare. Particular emphasis is given to such areas of inquiry as consumer behaviour and market demand, production, cost and technology, market structure and business strategy, market failure and government policy. Topics relevant to real-world issues and problems provide the focus for in-class discussion. Upon completion, students are expected to be familiar with the fundamental concepts, tools and techniques of microeconomics and to be able to apply them in analyzing real-world business problems.

Course Credit Exclusions: AP/ECON 1000 3.00, GL/ECON 2500 3.00 [prior to Fall 2014] and SB/INTL 1200 3.00

11. Course Learning Outcomes:

Upon successful completion of this course, students will be able to:

1. *Think critically and formulate independent and well-considered conclusions about economic issues and policies and their potential impact on the business environment.*
2. *Make rational decisions based on rudimentary marginal analysis.*
3. *Understand market structures and market power.*
4. *Understand how competition impacts firm profitability.*
5. *Use market structure models to explain and to predict business firm behavior*

12. Rationale:

The Schulich School of Business Dean, Associate Dean Academic and BBA director have asked the Economics Area to bring the first-year core microeconomics course ECON 1000 from LAPS to Schulich. We have designed the course ECON 1000 now titled 'Microeconomics for Managers' to have a stronger managerial focus for the benefit of our BBA students.

Updating the ECON 1000 course to 'Microeconomics for Managers' in a blended, large class format is designed to better prepare Schulich BBA students for managerial roles by making microeconomic principles directly relevant to business practice. This strategic shift enhances learning through flexibility and engagement, aiming to improve the BBA program's appeal and effectiveness.

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13. Evaluation:

Assignment/Task	*Quantity*	*% Weight*	*Format*
Participation – class lectures		*15%*	*Individual*
Cengage Chapter Quiz Assignments		*10%*	*Individual: online homework*
Lab Work		*20%*	*Individual: In-Tutorial Live*
Midterm Exam	*1*	*25%*	*Individual: In-Tutorial Live*
Final Exam	*1*	*30%*	*Individual - Scheduled by York University*
		100%	

14. Integrated Courses:
N/A

15. Cross-listed Courses:
N/A

16. Enrolment Notes:
N/A

17. Faculty Resources:
Faculty members: Irene Henriques, Alexander Coutts, Theodore Tolias
Expected frequency: Course is a first year BBA core course to be offered annually.
Faculty resource impact: This course is not expected to impact faculty resources.

18. Physical Resources:
The course requires standard classroom infrastructure, and standard virtual class tools (if remote). As such it does not require any additional resources.

19. Bibliography and Library Statement:
Please provide an appropriate and up-to-date bibliography in standard format. A statement from the University librarian responsible for Economics certifying that adequate library resources are available for the new course is attached.

1. Mankiw, N. G., Kneebone, R. D., and McKenzie, K. J. (2023). *Principles of Microeconomics*, Cengage Canada. + Cengage online learning platform that complements the textbook and will be integrated with the course Canvas site.

2. Access to business news sources such as Globe and Mail, the Economist, the Wall Street Journal, the Financial Times of London and VOX EU most of which can be freely accessed online or via York Libraries.

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

20. Instructors and Faculty Coordinator

Initial instructor:
Irene Henriques

Alternative instructors:
Alexander Coutts, Theo Tolias

Course coordinator:
Irene Henriques

21. Specializations

Primary area or specialization:
ECON

Secondary areas or specializations:
N/A

22. Student Contact and Enrolment

Contact hours:
36

Maximum enrolment:
565 (two sections)

Expected enrolment:
565 (two sections)

Evidence for enrolment expectations:
This is a first year BBA core course.

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

a. Economic inclusion and societal wellbeing are important microeconomic topics.

b. This course highlights how economic decisions (e.g., economic reconciliation, minimum wage laws) can contribute to equity and inclusion.

24. Human Participants Research

N/A

25. Conditions for Approval

N/A

Originator:

Signature	March 15, 2024 Date
Irene Henriques Name	Economics Area or Specialization

Supporting Faculty Members

The Economics Area Coordinator, Irene Henriques, has consulted with faculty in Strategic Management, Finance, Accounting, and Economics to obtain their support. A letter listing faculty support is attached.

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.

Willow Sheremata	*Strategic Management*
Linda Thorne	*Accounting*
Pauline Shum-Nolan	*Finance*

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Alexander Coutts *Economics*

Atipol Bhanich Supapol *Economics*

Ming Dong *Finance*

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.

	March 15, 2024
Signature	Date
Irene Henriques	Area Coordinator Economics
Name of Coordinator or Director	Area or Specialization

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA Program
Name of Program Director	Program

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

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Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

ECON 1000 – Microeconomics for Managers

Course Outline

Fall 2024

Class: TBA (2 large classes each 1.5 hours)
Labs: TBA (4 - 1.5 hour labs for each large class)

Instructor: Irene Henriques Office: Email: XXX Office hours: XXX	Faculty Secretary Domenica Lam N 205B SSB 416 736 5068 dlam@schulich.yorku.ca

This course is delivered in a *blended* format, which at York University is defined as meaning at least a third of the lectures and seminars will be delivered online and a third face-to-face, with the remaining third being any combination of online or face-to-face. The class-by-class schedule included below lists which weeks will be delivered in person, and which will be delivered remotely.

Brief Course 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.

Course Credit Exclusions: AP/ECON 1000 3.00, GL/ECON 2500 3.00 [prior to Fall 2014] and SB/INTL 1200 3.00

Course Exclusions

N/A

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Course Description and Learning Outcomes

The key objective of this course is to introduce and familiarize students with the main ideas, concepts, tools and techniques of microeconomics so that they can identify, understand and evaluate the dynamics of domestic and global market forces which, in interaction with government policy, affect business operations and consumer welfare. Particular emphasis is given to such areas of inquiry as consumer behaviour and market demand, production, cost and technology, market structure and business strategy, market failure and government policy. Topics relevant to real-world issues and problems provide the focus for in-class discussion. Upon completion, students are expected to be familiar with the fundamental concepts, tools and techniques of microeconomics and to be able to apply them in analyzing real-world business problems.

Upon successful completion of this course, students will be able to:

1. Think critically and formulate independent and well-considered conclusions about economic issues and policies and their potential impact on the business environment.
2. Make rational decisions based on rudimentary marginal analysis.
3. Understand market structures and market power.
4. Understand how competition impacts firm profitability.
5. Use market structure models to explain and to predict business firm behavior.

Deliverables at a Glance

Assignment/Task	Quantity	% Weight	Format
Participation – class lectures		15%	Individual
Cengage Chapter Quiz Assignments		10%	Individual: online homework
Lab Work		20%	Individual: In-Tutorial Live
Midterm Exam	1	25%	Individual: In-Tutorial Live
Final Exam	1	30%	Individual - Scheduled by York University
		100%	

Course Material

Required reading for this course includes the following book.

Mankiw, N. G., Kneebone, R. D., and McKenzie, K. J. (2023). *Principles of Microeconomics*, Cengage Canada.

For information and guidance as to how you can get online access to the e-book and the publisher's entire digital package of materials that accompanies the textbook see the PowerPoint presentation "How to get access to the e-book & digital package (publisher's instructions)" at the bottom of the "Modules" page.

Cengage is an online learning platform that complements your textbook and is integrated with the course Canvas site. Among other things, Cengage will be used for Chapter Quiz assignments and provides students a variety of learning resources, including optional practice questions.

Lecture Slides will be posted on the "Modules" page as the course progresses.

Unless you purchase access to the above materials, you will not be able to complete the course deliverables.

To effectively relate course materials with real-world economic issues, students are strongly encouraged to read the business section of the Globe and Mail. Publications such as the Economist, the Wall Street Journal and the Financial Times of London are also recommended, as is VOX EU which can be freely accessed online or online via York University Library.

Support material for this course, including announcements, assignment details and other course documents will be available in Canvas. Canvas is a cloud-hosted Learning Management System, accessible from any browser at schulich.instructure.com. Students are responsible for reviewing, in a timely manner, all communications from instructors. Please check your Canvas course page regularly.

Student Preparation for Class: Expectations

The following represent the **minimum** standards that are expected of you in this course:

1. The student is responsible for reading the textbook and for preparing in advance the topics noted on the Schedule of Topics and Readings. Advanced preparation is necessary in order to maximize the usefulness of classroom time.

2. A key pedagogical assumption of this course is that students are co-creators of the learning experience. Students help create learning for themselves and others through active participation. This means both listening to others carefully and contributing respectfully. Class discussions are an important opportunity to practice communicating about economic concepts and information.

3. Tutorial lab sessions provide students with the opportunity to learn the more technical aspects of the course material in a structured setting. Lab instructors will lead students through and answer questions on specific material. They will also address more general questions on the subject matter of the course. Tutorial lab assignments are not necessarily covered in detail in class; however, this material is part of the course, and you are responsible for it for examination purposes. It is recommended you **not** skip the lab sessions as your participation grade is tied to attendance in both lectures and labs. **Students are strongly encouraged to participate in class and lab activities.** You will be given opportunities to think your way through questions posed to you – take this opportunity to practice your analytical skills.

Etiquette & Courtesy

a) Please be punctual to avoid disturbing the instructor and the rest of the class. It is understandable that extenuating circumstances may arise. If you are unavoidably late, please be considerate and enter the class discretely from the rear.

b) Lectures run for an hour-and-a-half and labs for an hour-and-a-half. Please remain seated and attentive until class is dismissed.

c) During class and labs, please focus on the lesson at hand. Please refrain from discussions with your friends / peers as this may be distracting to those around you. You are encouraged to share any insights / thoughts you may have with the class as a whole.

d) Overall – please conduct yourselves with the professionalism, respectfulness and courtesy that would be expected of you as students at the Schulich School of Business.

Participation, Chapter Quizzes and Exams: Descriptions

Participation (15%)
Class participation is a key part of the learning experience. Preparation for the class and involvement in class discussion are essential to learning. Class contribution will be evaluated in terms of attendance in lectures, and the evidence of sound reasoning and positive contribution to class discussion polls.

Cengage chapter quizzes (10%)
Ten chapter-quizzes are to be completed in Cengage. The Cengage chapter quizzes provide the opportunity for assessment of your knowledge gained from lectures and the text. Two attempts are allowed for each quiz. Only the "best mark" of each assignment will be recorded between the start date and the due date. The best 8 of 10 quizzes will be equally weighted in the 10%. There are no "make-up" chapter quizzes or extensions.

Lab Work (20%)
Tutorial lab sessions provide students with the opportunity to learn the more technical aspects of the course material in a structured setting. Lab instructors will lead students through and answer questions on specific material. In every lab, you will be asked to apply your knowledge via an exercise using MindTap.

Mid-Term Exam (25%) and Final Exam (30%)
The midterm will be held in-class using the Canvas platform. The exam will consist of multiple-choice questions. Further details will be provided by instructor.

The exams are closed book. A calculator with only mathematical functions is allowed.

The final exam will cover all material after the mid-term.

Calculation of Course Grade

In this class, final course grades will be determined as follows: Numerical grades for each evaluation component will be converted to an overall percentage grade for the course using a weighted average calculation. The resulting percentage grade will be converted to a letter grade.

Schulich's 9-value index system for undergraduate students is as follows.

GRADING SCHEME

A+	100% to 89.5%
A	< 89.5% to 79.5%
B+	< 79.5% to 74.5%
B	< 74.5% to 69.5%

C+	< 69.5% to 64.5%
C	< 64.5% to 59.5%
D+	< 59.5% to 54.5%
D	< 54.5% to 49.5%
F	< 49.5% to 0%

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

Undergraduate 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 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/
Be advised that the unauthorized use of AI tools (such as image-generating AI, like DALL-E) could be considered to be plagiarism.

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/

Exams (Absence from)
Mid-term: 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. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file. If a midterm is missed based on an acceptable (refer to Student Services guidelines) documented reason your midterm mark will be allocated to the final examination i.e. you will write the final exam for the combined midterm and final exam marks.

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 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 a copy of this document, visit http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf.

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

Quick Reference: Summary of Classes, Activities and Deliverables

The following list of lecture topics and readings indicate the material to be read, reviewed and/or prepared for the various class sessions. If any changes in this schedule become necessary, notifications will be posted on the course CANVAS.

Class Session Date	Topic	Assigned Readings	Deliverables
Class 1	Thinking like an economist	Textbook: Chapter 2	
Lab 1	Review of basic tools used in microeconomics	MindTap exercises	Participation
Class 2	Market forces of supply and demand	Textbook: Chapter 4	Chapter quiz assessment
Lab 2	Demand and supply problems and applications	MindTap exercises	Participation
Class 3	Elasticity and its application	Textbook: Chapter 5	Chapter quiz assessment
Lab 3	Elasticity exercises	MindTap exercises	Participation
Class 4	Supply, demand, and government policies	Textbook: Chapter 6	Chapter quiz assessment
Lab 4	Price controls and taxes	MindTap exercises	Participation
Class 5	Consumers, producers, and the efficiency of markets	Textbook: Chapter 7	Chapter quiz assessment
Lab 5	The mathematics of consumer and producer surplus	MindTap exercises	Participation
Class 6	No Class		
Lab 6		In-person Midterm	Mid-Term
Class 7	Externalities	Textbook: Chapter 10	Chapter quiz assessment
Lab 7	Externalities exercises	MindTap exercises	Participation
Class 8	The costs of production	Textbook: Chapter 13	Chapter quiz assessment
Lab 8	Costs of production	MindTap exercises	Participation

Class Session Date	Topic	Assigned Readings	Deliverables
Class 9 **Lab 9**	Firms in competitive markets Competition	Textbook: Chapter 14 MindTap exercises	Chapter quiz assessment Participation
Class 10 **Lab 10**	Monopoly Monopoly	Textbook: Chapter 15 MindTap exercises	Chapter quiz assessment Participation
Class 11 **Lab 11**	Monopolistic Competition Monopolistic Competition	Textbook: Chapter 16 MindTap exercises	Chapter quiz assessment Participation
Class 12 **Lab 12**	Oligopoly FINAL EXAM REVIEW	Textbook: Chapter 17 Final exam Review	Chapter quiz assessment No lab deliverables
FINAL EXAMINATION DATE TBA (Dec 5 – 20)			

MEMORANDUM

York University Libraries

To: Irene Henriques

From: Aaron Lupton, Content and Licensing Librarian, Content Development and Analysis

Date: March 13, 2024

Subject: Library Statement of Support – ECON 1000

Summary

York University Libraries (YUL) are well positioned to support the proposed course. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings related to the major themes of the course. It also brings attention to collections of interest from connected fields such as economics and business.

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.

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 register of electronic offerings.

eBook Platforms:

- De Gruyter eBooks
- Oxford Scholarship Online

- Cambridge Core
- Taylor & Francis eBooks
- ProQuest eBook Central
- Scholars Portal Books

Subject Databases:

- ECONLit
- CIAO – Columbia International Affairs Online
- JSTOR
- ProQuest
- Scholars Portal Journals
- Web of Science

Reference Resources:

- Britannica Online
- InvestorWords
- Concise Dictionary of Economics
- Oxford Reference Online
- Very Short Introductions (Oxford University Press)

Newspaper/ Magazine Collections:

- The Economist Historical Archive
- Press Reader
- Factiva
- CBCA Complete
- Nexis Uni

Streaming Media:

- Kanopy
- Sage Research Methods

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:

- Economics Guide
- Business 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: Irene Henriques, Professor and Area Coordinator Economics
Date: March 15, 2024
Re: SB/ECON 1010 3.00 New Course Proposal

Motion: Approve SB/ECON 1010 3.00 – Macroeconomics for Managers

Rationale:
The Schulich School of Business Dean, Associate Dean Academic and BBA director have asked the Economics Area to bring the first-year core macroeconomics course ECON 1010 from LAPS to Schulich. We have designed the course ECON 1010 now titled 'Macroeconomics for Managers' to have a stronger managerial focus for the benefit of our BBA students.

Updating the ECON 1010 course to 'Macroeconomics for Managers' in a blended, large class format is designed to better prepare Schulich BBA students for managerial roles by making macroeconomic principles directly relevant to business practice. This strategic shift enhances learning through flexibility and engagement, aiming to improve the BBA program's appeal and effectiveness.

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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 BBA Program

2. Responsible Unit:
ECON

3. Subject Code (Rubric) and Course Number:
ECON 1010

4. Credit Value:
3.00

5. Long Course Title:
Macroeconomics for Managers

6. Short Course Title:
Macroeconomics for Managers

7. Effective Term/Calendar Year:
Winter 2025

8. Language of Instruction:
English

9. Calendar (Short) Course 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, exchange rates and international trade, and the effect of governments' monetary and fiscal policies.

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Pre-Req: SB/ECON 1000 3.00 or equivalent. Course Credit Exclusions: AP/ECON 1010 3.00, GL/ECON 2510 3.00 (prior to Fall 2014) and SB/INTL 1210 3.00

10. Expanded Course Description:

The key objective of this course is to introduce and familiarize students with the main ideas, concepts, tools and techniques of macroeconomics so that they can identify, understand and evaluate the dynamics of domestic and global market forces which, in interaction with government policy, affect business operations and consumer welfare.

Particular emphasis is given to the role of international trade, monetary and fiscal policy, and the determinants of long run growth. The course will highlight the trade-offs involved in policymaking – e.g. inflation vs. unemployment, efficiency vs. equity, and government debt. Topics relevant to real-world issues and problems provide the focus for in-class discussion. Upon completion, students are expected to be familiar with the fundamental concepts, tools and techniques of macroeconomics and to be able to apply them in analyzing real-world business problems.

11. Course Learning Outcomes:

Upon successful completion of this course, students will be able to understand, explain, and analyze:

1. *the various measures of macroeconomic activity.*
2. *the economic models that determine equilibrium in an economy.*
3. *how market participants interact with each other and the impact of these interactions on a national and global level.*
4. *how economies move through business cycles.*
5. *how the government uses fiscal and monetary policy to influence economic outcomes.*

12. Rationale:

The Schulich School of Business Dean, Associate Dean Academic and BBA director have asked the Economics Area to bring the first-year core macroeconomics course ECON 1010 from LAPS to Schulich. We have designed the course ECON 1010 now titled 'Macroeconomics for Managers' to have a stronger managerial focus for the benefit of our BBA students.

Updating the ECON 1010 course to 'Macroeconomics for Managers' in a blended, large class format is designed to better prepare Schulich BBA students for managerial roles by making macroeconomic principles directly relevant to business practice. This strategic shift enhances learning through flexibility and engagement, aiming to improve the BBA program's appeal and effectiveness.

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13. Evaluation:

Assignment/Task	*Quantity*	*% Weight*	*Format*
Participation – class lectures		*15%*	*Individual*
Cengage Chapter Quiz Assignments		*10%*	*Individual: online homework*
Lab Work		*20%*	*Individual: In-Tutorial Live*
Midterm Exam	*1*	*25%*	*Individual: In-Tutorial Live*
Final Exam	*1*	*30%*	*Individual - Scheduled by York University*
		100%	

14. Integrated Courses:

N/A

15. Cross-listed Courses:

N/A

16. Enrolment Notes:

N/A

17. Faculty Resources:

Faculty members: Perry Sadorsky, Alexander Coutts, Theodore Tolias
Expected frequency: Course is a first year BBA core course to be offered annually.
Faculty resource impact: This course is not expected to impact faculty resources.

18. Physical Resources:

The course requires standard classroom infrastructure, and standard virtual class tools (if remote). As such it does not require any additional resources.

19. Bibliography and Library Statement:

A statement from the University librarian responsible for Economics certifying that adequate library resources are available for the new course is attached.

1. Mankiw, N. G., Kneebone, R. D., and McKenzie, K. J. (2023). *Principles of Macroeconomics*, Cengage Canada. + Cengage online learning platform that complements the textbook and will be integrated with the course Canvas site.
2. Access to business news sources such as Globe and Mail, the Economist, the Wall Street Journal, the Financial Times of London and VOX EU most of which can be freely accessed online or via York Libraries.

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

20. Instructors and Faculty Coordinator

Initial instructor:
Perry Sadorsky

Alternative instructors:
Theodore Tolias

Course coordinator:
Perry Sadorsky

21. Specializations

Primary area or specialization:
ECON

Secondary areas or specializations:
N/A

22. Student Contact and Enrolment

Contact hours:
36

Maximum enrolment:
565 (two sections)

Expected enrolment:
565 (two sections)

Evidence for enrolment expectations:
This is a BBA core course.

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

a. Economic inclusion and societal wellbeing are important macroeconomic topics.

b. This course highlights how government actions can contribute to equity and inclusion.

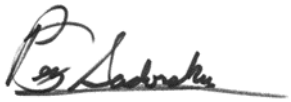
24. Human Participants Research

N/A

25. Conditions for Approval

N/A

Originator:



Signature	March 15, 2024 Date
Perry Sadorsky Name	Economics Area or Specialization

Supporting Faculty Members

The Economics Area Coordinator, Irene Henriques, has consulted with faculty in Strategic Management, Finance, Accounting, and Economics to obtain their support. A letter listing faculty support is attached.

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.

Willow Sheremata	*Strategic Management*
Linda Thorne	*Accounting*
Pauline Shum-Nolan	*Finance*

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York University

Alexander Coutts	*Economics*
Atipol Bhanich Supapol	*Economics*
Ming Dong	*Finance*

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	March 15, 2024 Date
Irene Henriques Name of Coordinator or Director	Area Coordinator Economics Area or Specialization

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

Burkard Eberlein Signature	March 22, 2024 Date
Burkard Eberlein Name of Program Director	BBA Program Program

Program Committee:

Schulich
School of Business
York University

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.

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

ECON 1010 – Macroeconomics for Managers

Course Outline

Winter 2025

Class: TBA (2 large classes each 1 ½ hours)
Labs: TBA (4 - 1.5 hour labs for each large class)

Instructor: Perry Sadorsky Office: Email: XXX Office hours: XXX	Faculty Secretary Jennifer Fernandes N 205 SSB 416 736 5068 jfernandes@schulich.yorku.ca

This course is delivered in a *blended* format, which at York University is defined as meaning at least a third of the lectures and seminars will be delivered online and a third face-to-face, with the remaining third being any combination of online or face-to-face. The class-by-class schedule included below lists which weeks will be delivered in person, and which will be delivered remotely.

Brief Course 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, exchange rates and international trade, and the effect of governments' monetary and fiscal policies.

Pre-requisites: SB/ECON 1000 3.00 or equivalent. Course Credit Exclusions: AP/ECON 1010 3.00, GL/ECON 2510 3.00 [prior to Fall 2014]and SB/INTL 1210 3.00

Course Exclusions

N/A

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Course Description and Learning Outcomes

The key objective of this course is to introduce and familiarize students with the main ideas, concepts, tools and techniques of macroeconomics so that they can identify, understand and evaluate the dynamics of domestic and global market forces which, in interaction with government policy, affect business operations and consumer welfare.

Emphasis is given to the role of international trade, monetary and fiscal policy, and the determinants of long run growth. The course will highlight the trade-offs involved in policymaking – e.g. inflation vs. unemployment, efficiency vs. equity, and government debt. Topics relevant to real-world issues and problems provide the focus for in-class discussion. Upon completion, students are expected to be familiar with the fundamental concepts, tools and techniques of macroeconomics and to be able to apply them in analyzing real-world business problems.

Upon successful completion of this course, students will be able to understand, explain, and analyze:

1. the various measures of macroeconomic activity.
2. the economic models that determine equilibrium in an economy.
3. how market participants interact with each other and the impact of these interactions on a national and global level.
4. how economies move through business cycles.
5. how the government uses fiscal and monetary policy to influence economic outcomes.

Deliverables at a Glance

Assignment/Task	Quantity	% Weight	Format
Participation – class lectures		15%	Individual
Cengage Chapter Quiz Assignments		10%	Individual: online homework
Lab Work		20%	Individual: In-Tutorial Live
Midterm Exam	1	25%	Individual: In-Tutorial Live
Final Exam	1	30%	Individual - Scheduled by York University
		100%	

Course Material

Required reading for this course includes the following book.

Mankiw, N. G., Kneebone, R. D., and McKenzie, K. J. (2023). *Principles of Macroeconomics*, Cengage Canada.

For information and guidance as to how you can get online access to the e-book and the publisher's entire digital package of materials that accompanies the textbook see the PowerPoint presentation

"How to get access to the e-book & digital package (publisher's instructions)" at the bottom of the "Modules" page.

Cengage is an online learning platform that complements your textbook and is integrated with the course Canvas site. Among other things, Cengage will be used for Chapter Quiz assignments and provides students a variety of learning resources, including optional practice questions.

Lecture Slides will be posted on the "Modules" page of Canvas as the course progresses.

Unless you purchase access to the above materials, you will not be able to complete the course deliverables.

To effectively relate course materials with real-world economic issues, students are strongly encouraged to read the business section of the Globe and Mail. Publications such as the Economist, the Wall Street Journal and the Financial Times of London are also recommended, as is VOX EU which can be freely accessed online or online via York University Library.

Support material for this course, including announcements, assignment details and other course documents will be available in Canvas. Canvas is a cloud-hosted Learning Management System, accessible from any browser at schulich.instructure.com. Students are responsible for reviewing, in a timely manner, all communications from instructors. Please check your Canvas course page regularly.

Student Preparation for Class: Expectations

The following represent the **minimum** standards that are expected of you in this course:

1. The student is responsible for reading the textbook and for preparing in advance the topics noted on the Schedule of Topics and Readings. Advanced preparation is necessary in order to maximize the usefulness of classroom time.

2. A key pedagogical assumption of this course is that students are co-creators of the learning experience. Students help create learning for themselves and others through active participation. This means both listening to others carefully and contributing respectfully. Class discussions are an important opportunity to practice communicating about economic concepts and information.

3. Tutorial lab sessions provide students with the opportunity to learn the more technical aspects of the course material in a structured setting. Lab instructors will lead students through and answer questions on specific material. They will also address more general questions on the subject matter of the course. Tutorial lab assignments are not necessarily covered in detail in class; however, this material is part of the course, and you are responsible for it for examination purposes. It is recommended you **not** skip the lab sessions your participation grade is tied to attendance in both lectures and labs. **Students are strongly encouraged to participate in class and lab activities.** You will be given opportunities to think your way through questions posed to you – take this opportunity to practice your analytical skills.

Etiquette & Courtesy

a) Please be punctual to avoid disturbing the instructor and the rest of the class. It is understandable that extenuating circumstances may arise. If you are unavoidably late, please be considerate and enter the class discretely from the rear.

b) Lectures run for an hour-and-a-half and labs for an hour-and-a-half. Please remain seated and attentive until class is dismissed.

c) During class and labs, please focus on the lesson at hand. Please refrain from discussions with your friends / peers as this may be distracting to those around you. You are encouraged to share any insights / thoughts you may have with the class as a whole.

d) Overall – please conduct yourselves with the professionalism, respectfulness and courtesy that would be expected of you as students at the Schulich School of Business.

Participation, Chapter Quizzes and Exams: Descriptions

Participation (15%)
Class participation is a key part of the learning experience. Preparation for the class and involvement in class discussion are essential to learning. Class contribution will be evaluated in terms of attendance in lectures, and the evidence of sound reasoning and positive contribution to class discussion polls.

Cengage chapter quizzes (10%)
Ten chapter-quizzes are to be completed in Cengage. The Cengage chapter quizzes provide the opportunity for assessment of your knowledge gained from lectures and the text. Two attempts are allowed for each quiz. Only the "best mark" of each assignment will be recorded between the start date and the due date. The best 8 of 10 quizzes will be equally weighted in the 10%. There are no "make-up" chapter quizzes or extensions.

Lab Work (20%)
Tutorial lab sessions provide students with the opportunity to learn the more technical aspects of the course material in a structured setting. Lab instructors will lead students through and answer questions on specific material. In every lab, you will be asked to apply your knowledge via an exercise using MindTap.

Mid-Term Exam (25%) and Final Exam (30%)
The midterm will be held in-class using the Canvas platform. The exam will consist of multiple-choice questions. Further details will be provided by instructor.

The exams are closed book. A calculator with only mathematical functions is allowed.

The final exam will cover all material after the mid-term.

Calculation of Course Grade

In this class, final course grades will be determined as follows: Numerical grades for each evaluation component will be converted to an overall percentage grade for the course using a weighted average calculation. The resulting percentage grade will be converted to a letter grade.

Schulich's 9-value index system for undergraduate students is as follows.

GRADING SCHEME

A+	100% to 89.5%
A	< 89.5% to 79.5%

B+	< 79.5% to 74.5%
B	< 74.5% to 69.5%
C+	< 69.5% to 64.5%
C	< 64.5% to 59.5%
D+	< 59.5% to 54.5%
D	< 54.5% to 49.5%
F	< 49.5% to 0%

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

Undergraduate 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 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/
Be advised that the unauthorized use of AI tools (such as image-generating AI, like DALL-E) could be considered to be plagiarism.

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/

Exams (Absence from)
Mid-term: 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. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file. If a midterm is missed based on an acceptable (refer to Student Services guidelines) documented reason your midterm mark will be allocated to the final examination i.e. you will write the final exam for the combined midterm and final exam marks.

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 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 a copy of this document, visit http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf.

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

Quick Reference: Summary of Classes, Activities and Deliverables

The following list of lecture topics and readings indicate the material to be read, reviewed and/or prepared for the various class sessions. If any changes in this schedule become necessary, notifications will be posted on the course CANVAS.

Class Session Date	Topic	Assigned Readings	Deliverables
Class 1	Measuring a nation's income	Textbook: Chapter 5	Chapter quiz assessment
Lab 1	Measuring a nation's income	MindTap exercises	participation
Class 2	Measuring the cost of living	Textbook: Chapter 6	Chapter quiz assessment
Lab 2	Measuring the cost of living	MindTap exercises	participation
Class 3	Production and growth	Textbook: Chapter 7	Chapter quiz assessment
Lab 3	Production and growth	MindTap exercises	participation
Class 4	Savings, investment and the financial system	Textbook: Chapter 8	Chapter quiz assessment
Lab 4	Savings, investment and the financial system	MindTap exercises	participation
Class 5	Unemployment and its natural rate	Textbook: Chapter 9	Chapter quiz assessment
Lab 5	Unemployment and its natural rate	MindTap exercises	participation
Class 6	The monetary system	Textbook: Chapter 10	Chapter quiz assessment
Lab 6	The monetary system	MindTap exercises	participation

Class Session Date	Topic	Assigned Readings	Deliverables
Class 7	No class		
Lab 7		Midterm exam	Midterm exam
Class 8	Money growth and inflation	Textbook: Chapter 11	Chapter quiz assessment
Lab 8	Money growth and inflation	MindTap exercises	participation
Class 9	Open economy macroeconomics - basic concepts	Textbook: Chapter 12	Chapter quiz assessment
Lab 9	Open economy macroeconomics - basic concepts	MindTap exercises	participation
Class 10	A macroeconomic theory of the small open economy	Textbook: Chapter 13	Chapter quiz assessment
Lab 10	A macroeconomic theory of the small open economy	MindTap exercises	participation
Class 11	Aggregate demand and aggregate supply. The influence of monetary policy on aggregate demand.	Textbook: Chapters 14, 15	Chapter quiz assessment
Lab 11	Aggregate demand and aggregate supply. The influence of monetary policy on aggregate demand.	MindTap exercises	participation
Class 12	The influence of monetary and fiscal policies on aggregate demand.	Textbook: Chapters 15, 16	Chapter quiz assessment
Lab 12		Final exam review	No lab deliverables
FINAL EXAMINATION DATE TBA (April ? – ?)			

MEMORANDUM

York University Libraries

To: Irene Henriques

From: Aaron Lupton, Content and Licensing Librarian, Content Development and Analysis

Date: March 13, 2024

Subject: Library Statement of Support – ECON 1010

Summary

York University Libraries (YUL) are well positioned to support the proposed course. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings related to the major themes of the course. It also brings attention to collections of interest from connected fields such as economics and business.

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.

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 register of electronic offerings.

eBook Platforms:

- De Gruyter eBooks
- Oxford Scholarship Online

- Cambridge Core
- Taylor & Francis eBooks
- ProQuest eBook Central
- Scholars Portal Books

Subject Databases:

- ECONLit
- CIAO – Columbia International Affairs Online
- JSTOR
- ProQuest
- Scholars Portal Journals
- Web of Science

Reference Resources:

- Britannica Online
- InvestorWords
- Concise Dictionary of Economics
- Oxford Reference Online
- Very Short Introductions (Oxford University Press)

Newspaper/ Magazine Collections:

- The Economist Historical Archive
- Press Reader
- Factiva
- CBCA Complete
- Nexis Uni

Streaming Media:

- Kanopy
- Sage Research Methods

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:

- Economics Guide
- Business 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.

To: Faculty Council, Schulich School of Business
From: Willow Sheremata, Strategic Management
Date: March 11, 2024
Re: Changes to the Strategic Management Specialization

MOTION:
That the BBA/iBBA Program Committee approve the proposed changes to the Strategic Management specialization.

RATIONALE:

The proposed change is to increase the number of SGMT courses a student must take from the Required Courses list from one to two. This is consistent with most other BBA and MBA specializations. It makes no sense for a student to receive a Strategic Management specialization with only one SGMT course, because they will have learned very little strategic management.

We also propose adding SGMT 4350 – International Business Simulation – to the Required Courses list. A motion to approve this new course is proposed concurrent with the change in the number of required SGMT courses. SGMT 4350 provides much needed international business content to our undergraduate curriculum while also offering experiential learning. Adding this course will also give students choice among strategic management electives in their fulfillment of this specialization.

Finally, the rubric for the MGMT 4300 elective was previously changed to SUST 4300, so that reference has been updated in the specialization as well.

Schulich School of Business
York University

Specialization/Stream Change Proposal Form
Schulich School of Business

The following information is required for all specialization/stream 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:

BBA

2. Responsible Unit:

Strategic Management

3. Type of Specialization/Stream Change(s) (indicate all that apply):

	changes to specialization/stream name
X	changes to list of required credits
X	changes to list of required courses
X	changes to list of elective courses
	retire specialization/stream
	other **(please specify)**

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

Fall 2024

5. **Rationale for Change:**

The proposed change is to increase the number of SGMT courses a student must take from the Required Courses list from one to two. This is consistent with most other BBA and MBA specializations. It makes no sense for a student to receive a Strategic Management specialization with only one SGMT course, because they will have learned very little strategic management.

We also propose adding SGMT 4350 – International Business Simulation – to the Required Courses list. A motion to approve this new course is proposed concurrent with the change in the number of required SGMT courses. SGMT 4350 provides much needed international business content to our undergraduate curriculum while also offering

experiential learning. Adding this course will also give students choice among strategic management electives in their fulfillment of this specialization.

Finally, the rubric for the MGMT 4300 elective was previously changed to SUST 4300, so that reference has been updated in the specialization as well.

6. Proposed Specialization/Stream Information:

Existing Specialization/Stream Information (Change From):	Proposed Specialization/Stream Information (Change To):
How to Specialize To specialize in Strategic Management, enrol in at least one course from the Required Courses list, and up to three courses from the Elective Courses list, for a total of 12.00 credits. These credits include a minimum of 3.00 credits from the Required list, and a maximum of 9.00 credits from the Elective list. **Required Courses** SB/SGMT 4150 3.00* Integrative Business Simulation SB/SGMT 4200 3.00 Mergers and Acquisitions SB/SGMT 4300 3.00 Strategic Thinking Skills SB/SGMT 4750 3.00 Strategy Execution ***SB/SGMT 4150 will not be offered until the Winter 2026 term.** **Elective Courses** SB/ECON 3200 3.00 Economics of Business Management SB/ECON 4210 3.00 Economic Forecasting & Analysis SB/ENTR 4600 3.00 Entrepreneurship and New Venture Creation SB/ENTR 4700 3.00 Financing Growing Ventures SB/IBUS 3100 3.00 Global Business Environment	To specialize in Strategic Management, enrol in at least two courses from the Required Courses list, and up to two courses from the Elective Courses list, for a total of 12.00 credits. These credits include a minimum of 6.00 credits from the Required list, and a maximum of 6.00 credits from the Elective list. **Required Courses** SB/SGMT 4150 3.00* Integrative Business Simulation SB/SGMT 4200 3.00 Mergers and Acquisitions SB/SGMT 4300 3.00 Strategic Thinking Skills SB/SGMT 4350 3.00 International Business Simulation SB/SGMT 4750 3.00 Strategy Execution ***SB/SGMT 4150 will not be offered until the Winter 2026 term.** **Elective Courses** SB/ECON 3200 3.00 Economics of Business Management SB/ECON 4210 3.00 Economic Forecasting & Analysis SB/ENTR 4600 3.00 Entrepreneurship and New Venture Creation SB/ENTR 4700 3.00 Financing Growing Ventures

SB/MGMT 3030 3.00 Creating Global Capitalism SB/MGMT 4800 3.00 Management Consulting SB/MGMT 4700 3.00 Project Management SB/OMIS 4560 3.00 Supply Chain Management SB/SUST 4000 3.00 Government and Business SB/MGMT 4300 3.00 Corporate Social Responsibility in a Global Context	SB/IBUS 3100 3.00 Global Business Environment SB/MGMT 3030 3.00 Creating Global Capitalism SB/MGMT 4800 3.00 Management Consulting SB/MGMT 4700 3.00 Project Management SB/OMIS 4560 3.00 Supply Chain Management SB/SUST 4000 3.00 Government and Business SB/SUST 4300 3.00 Corporate Social Responsibility in a Global Context

7. Consultation:

N/A because no deletions or additions of courses across areas.

Originator:

Willow Sheremata	March 11, 2024
Signature	Date
Willow Sheremata	Strategic Management
Name	Area or Specialization

Approvals:

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

Willow Sheremata	March 11, 2024
Signature	Date
Willow Sheremata	Strategic Management
Name	Area or Specialization

Schulich
School of Business
York University

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Programs
Name of Program Director	Program

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

Burkard Eberlein	March 22, 2024
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business

From: Anoop Madhok, Professor, Strategic Management Area Rep for PhD in Administration

Date: March 4, 2024

Re: Updates on the FGS website regarding the graduate field in Strategic Management within the PhD program in Administration

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Motion: Be it moved that the information on the Faculty of Graduate Studies website regarding the graduate field in Strategic Management within the PhD program in Administration be updated to align with the program in its current form

Rationale: The information on the Faculty of Graduate Studies website regarding the graduate field in Strategic Management within the PhD program in Administration was last updated over a decade ago. Since then, there have been several changes. For instance, the area name has changed from Policy and Strategic Management to Strategic Management, SGMT 7050 is now SUST 7050, the ORGS elective 7020 is now SUST 7020, and Accounting 6600 is no longer on the list of electives. The purpose of the motion is to align the FGS information with the Area program in its current form. All the other areas have updated the information on the FGS website except for Strategic Management.

Schulich School of Business
York University

Specialization/Stream Change Proposal Form

Schulich School of Business

The following information is required for all specialization/stream 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:**
   PhD Program

2. **Name of Specialization/Stream**
   Strategic Management

3. **Responsible Unit:**
   SGMT

4. **Type of Specialization/Stream Change(s) (indicate all that apply):**

	changes to specialization/stream name
	changes to list of required credits
	changes to list of required courses
	changes to list of elective courses
	retire specialization/stream
X	other **(please specify)** Updating information on the FGS website regarding the PhD program in Strategic Management

5. **Effective Term/Calendar Year of Proposed Change(s):**
   Fall 2024

Rationale for Change:

The information on the Faculty of Graduate Studies website regarding the PhD program in Strategic Management was last updated over a decade ago. Since then, there have been several changes. For instance, the area name has changed from Policy and Strategic Management to Strategic Management, SGMT 7050 is now SUST 7050, the ORGS elective 7020 is now SUST 7020, and Accounting 6600 is no longer on the list of electives. The purpose for the change is to align the FGS information with the Area program in its current form. All the other areas have updated the information on the FGS website except for Strategic Management.

Existing Specialization/Stream Information (Change From):	Proposed Specialization/Stream Information (Change To):
Candidates for the ~~Policy and~~ Strategic Management field PhD degree must fulfil the following minimum requirements: 1. Courses Students must successfully complete the following course requirements: Required Courses Doctoral Course in Administrative Studies 7100 3.00 Logics of Social Research Doctoral Course in Administrative Studies 7250 3.00 Research Design Doctoral Course in Administrative Studies 7400 3.00 Qualitative Research Methods ~~A 3.00 credit graduate level methodological course chosen in consultation with the field's PhD Program Coordinator~~ ~~Another 3.00 credit graduate level methodological course chosen in consultation with the field's PhD Program Coordinator~~ Doctoral Course in Administrative Studies 7610 1.50 Graduate Colloquium in Management Doctoral Course in Administrative Studies 7600 1.50 Graduate Colloquium in Management Strategic Management 7010 3.0 Strategic Management Seminar I Strategic Management 7020 3.0 Strategic Management Seminar II ~~Organization Studies 7020 3.00 Advanced Topics in Organization Theory OR Organization Studies 7010 3.00 Individual Behavior in Organizations~~	Candidates for the Strategic Management field PhD degree must fulfil the following minimum requirements: 1. Courses Students must successfully complete the following course requirements: Required Courses Doctoral Course in Administrative Studies 7100 3.00 Logics of Social Research Doctoral Course in Administrative Studies 7250 3.00 Research Design Doctoral Course in Administrative Studies 7400 3.00 Qualitative Research Methods Doctoral Course in Administrative Studies 7610 1.50 Graduate Colloquium in Management Doctoral Course in Administrative Studies 7600 1.50 Graduate Colloquium in Management **Two 3.00 credit graduate level methodological courses chosen in consultation with the field's PhD Program Coordinator** Strategic Management 7010 3.0 Strategic Management Seminar I Strategic Management 7020 3.0 Strategic Management Seminar II **Sustainability 7010 3.00: Advanced Topics in Responsible Business OR Sustainability 7020 3.00: Advanced Topics in Organization Theory** **Organization Studies 7010 3.00: Individual Behavior in Organizations OR Organization Studies 7050 3.0: Meso Organizational Behaviour**

~~Two~~ Elective Courses Students will take ~~at least two of the following four electives:~~ ~~Accounting 6600 3.0: Auditing Standards & Applications~~ Strategic Management 7030 3.0: International Business Strategic Management 7040 3.0: Corporate Strategy ~~Strategic Management 7050 3.0: Business, Society and Global Governance~~ Strategic Management ~~7090~~ 3.0: Special Topics in Strategic Management Research Paper Students must submit one research paper that synthesizes a particular body of literature and furthers our understanding on a specific topic in strategy. The research paper is a prerequisite to the comprehensive exams ~~and should comprise both a theoretical and an empirical component. Students work closely with a faculty advisor on this paper.~~ ~~The initial submission of the research paper is due before the end of December of the second year. Students are required to present this paper in the research seminar series, normally during the spring. Students are expected to submit the final version of the paper by May 15 of the second year.~~ The paper ~~is evaluated and~~ must be approved by the research paper's faculty advisor, the area PhD Coordinator ~~and an additional faculty member.~~ 2. Comprehensive Examinations The comprehensive field examination takes place after the summer of the second year. The comprehensive exams are designed to test a student's breadth of knowledge in the field of strategic management as well as	Elective Courses Students will take **three electives from the list below:** • Strategic Management 7030 3.0: International Business • Strategic Management 7040 3.0: Corporate Strategy • Strategic Management **7900** 3.0: Special Topics in Strategic Management • **One course that is chosen, in consultation with the Strategy Area PhD Program Representative, from among doctoral level courses offered at Schulich, York or elsewhere** 2. Research Paper Students must submit one research paper that synthesizes a particular body of literature and furthers our understanding on a specific topic in strategy. The research paper is a prerequisite to the comprehensive exams. **Students work closely with a faculty advisor on this paper. Students are required to submit and present the initial version of the paper during the Fall term of the second year and the final version before the end of the Winter term.** The paper must be approved by the research paper's faculty advisor and the area PhD Coordinator. 3. Comprehensive Examinations The comprehensive field examination normally takes place after the summer of the second year. The comprehensive exams are designed to test a student's breadth of knowledge in the field of strategic management as well as depth of knowledge in select areas. **It is a written exam consisting of two parts. Part I tests students' knowledge of theory, ability to conceptualize and ability to extend or offer novel insights into current theory.**

depth of knowledge in select areas. ~~In preparation for their exams, students are given a list of classic readings at the beginning of their program; the list consists of books and journal articles that have defined the field. Students are expected to have a thorough comprehension and understanding of the historical development and the fundamental questions that have guided the discourse in the field. Students are also expected to be thoroughly versed in the current literature and research questions that occupy select areas of the field of strategy. It is assumed that these areas will subsequently define the scope of a student's dissertation.~~ Those who fail have the opportunity to retake the exams once, within six months of the date of the first comprehensive exam. Those who fail to pass a second time are not allowed to continue in the PhD program. The program regards the comprehensive examination as a pivotal point for deciding whether students should be allowed to proceed with their studies or be encouraged to withdraw from the program. 3. Dissertation Proposal and Oral Defence Candidates must prepare a written proposal to conduct original dissertation research carried out under the supervision of a supervisory committee, and must defend this to the satisfaction of the thesis supervisor and members of the supervisory committee. 4. Dissertation and Oral Examination Candidates must prepare a dissertation based on original research carried out under the supervision of a supervisory committee and submit the results in	**Part II tests students' knowledge of research methods.** Those who fail have the opportunity to retake the exams once, within six months of the date of the first comprehensive exam. Those who fail to pass a second time are not allowed to continue in the PhD program. The program regards the comprehensive examination as a pivotal point for deciding whether students should be allowed to proceed with their studies or be encouraged to withdraw from the program. 4. Dissertation Proposal and Oral Defence Candidates must prepare a written proposal to conduct original dissertation research carried out under the supervision of a supervisory committee, and must defend this to the satisfaction of the thesis supervisor and members of the supervisory committee. 5. Dissertation and Oral Examination Candidates must prepare a dissertation based on original research carried out under the supervision of a supervisory committee and submit the results in appropriate dissertation form. **When the committee is satisfied that the student has achieved the standards of original contribution and scholarship, the student is called to orally defend the dissertation to a panel, comprising of the supervisory committee and external examiners. Upon successful approval by the thesis examining committee, the student is considered to have successfully completed the requirements for the PhD.**

appropriate dissertation form. ~~After the formal submission of the dissertation, an oral examination is held. It is expected that all or part of the dissertation will be published following professional or scientific review.~~	

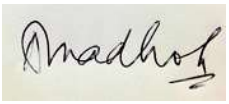
6. Proposed Specialization/Stream Information:

Please insert the current, approved specialization/stream information as it appears in the handbook on the left, and proposed specialization/stream information on the right. Please clearly and visibly indicate the changes using strikethrough (left column), bold, underlining, colours, etc. (right column).

7. Consultation:

For changes that include deletions or additions of courses across areas please provide evidence that appropriate consultation has taken place.

Originator:



Signature	March 4, 2024 Date
Anoop Madhok Name	SGMT Area or Specialization

Approvals:

Schulich
School of Business
York University

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

Willow Sheremata	March 22, 2024
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.

	March 25, 2024
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.

	March 25, 2024
Signature	Date
Peter Darke	PhD Program Committee
Name of Committee Chair	Committee

FACULTY COUNCIL
SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Schulich Faculty Council for the 2023-24 academic year was held via Zoom on **Friday, March 8, 2024** from **11:30am - 1:00pm**.

Minutes

In Attendance:

Chair: C. Graham

Vice-Chair: W. Shen

Secretary: K. Doyle

Assistant: L. Da Silva

Voting Members of Faculty Council Present:

Senior Admin	D. Zwick, K. Tasa, E. Fischer, A. Joshi, K. Kanagaretnam		
ACTG	S. Hsu, A. Mawani, A. Rahaman, G. Saxton, X. Su, L. Thorne, V. Trivedi		
ARTM	K. Rogers		
ECON	A. Coutts, I. Henriques, B. Wolf (ret.)		
ENTR			
FINE	K.-H. Bae, P. Foroughi, Y. Larkin, A. Rzeznik, P. Shum Nolan, Y. Tian		
MKTG	C. Bell, P. Darke, G. Packard, D. Rice, E. Veresiu		
MREI	L. Rolheiser		
ORGS	B. Lyons, R. Shao		
OMIS	M. Biehl, A. Diamant, D. Johnston, H. Kim, D. Oppong-Tawiah		
PLCY	A. Madhok, M. Majzoubi, C. McMillan, W. Sheremata, O. Weber		
PROP			
SUST	C. Cho, B. Eberlein, G. Kistruck, D. Matten, M. Valente	OTHER:	A. Liann (Lib)
Voting CPM's & Director of 601	L. Hillcoat, I. Holzinger, H. Sinker		
Student Reps	N. Choudhary (GBC), C. Huang (PhD), T. Porbanderwala (GBC)		

Voting Members of Faculty Council Absent:

M. Annisette	A. DeCarufel (ret.)	R. Karambayya (ret.)	M. Milevsky	M. Voronov
P. Aulakh	Y. Deutsch	A. Kecskes	G. Morgan (ret.)	S. Weiss
E. Auster	A. Devine	M. Kipping	L. Ng	T. Wesson (Ret.)
M. Bamber	V. Dhingra	M. Kristal	T. Noseworthy	E. Westney (ret.)
T. Beechy (ret.)	D. Dimick (ret.)	P. Laycock (Alum)	C. Oliver (ret.)	L. Wright (ret.)
R. Belk	M. Dong	F. Lazar	Y. Pan	S. Yeomans

A. Bhanich-Supapol	J. Everett	M. Levesque	T. Peridis	J. Yeung Do
I. Bicer	B. Gainer (ret.)	G. Li	H. Rosin (Ret.)	J. Zemans (ret.)
A. Campbell	M. Giesler	Z. Li	P. Sadorsky	L. Zhu
M. Cao	I. Hideg	I. Macdonald (ret.)	M. Samardzija (UBS)	
J. Clayton	D. Horváth (ret.)	R. McClean (ret.)	D. Sikri (UBS)	
W. Cook (ret.)	R. Imanirad	J. McKellar (ret.)	A. Sirsi	
J. Darroch	R. Irving (ret.)	N. Mead	J. Tan	

Leaves and Sabbaticals:

M. Farjoun	M. Kamstra	D. Neu	E. Prisman	J. Rungtusanatham

Non-Voting Members of Faculty Council Present

L. Atwood (guest)	N. Machado	L. Pan	T. Tolias
S. Babra	T. McQueen	C. Niederwanger	F. Zandi
A. Ferreira	G. Milavsky	A. Sriharan	
N. Jagdeosingh (guest)	V. Nallathamby (guest)	N. Sutherland	

Non-Voting Members of Faculty Council Absent:

B. Abtan	K. Elliot	V. Ivankine	C. Mueller	C. Sullivan
N. Alexandrian	D. Elsner	S.M. Kerr	K.R. Na	S. Thomas
W. Al-Hussaini	J. Fayt	B. Kha	Z. Necas	A. Thomson
D. Barret	A. Fisher	K. Kim	C. Partland	H. Turesson
M. Bhutani	S. Friedman	A. Konson	B. Pasquali	P. Walker
S. Browne	B. Gallagher	H. Koren-Cohen	G. Pau	M. Waxman
K. Butzek-Morris	A. Garber	L. Lakats	S. Penwarden	A. Welsh
E. Caprioni	S. Gargaro	S. Lee	J. Pinto	D. Woticky
C. Carder	T. Gosse	D. Lennox	P. Pivato	K. Vandezande
M. Cernea	C. Gray	R. Lynn	J. Pokrajac	A. Visram
J-M. Clark	J. Guo	P. Macdonald	S. Pulver	A. Voladina
M. Collyer	C. Hardman	D. Mak	R. Ross	R. Young
G. Deans	A. Harris	K. Mapa	C. Sachs	M. Zelver
M. De Luca	M. Hastings	Y. Massop	G. Sanchez Cuevas	W. Zhang

L. De Wilde	B. Hrehoruk	R. Mayer	V. Shanmuganathan	C. Zhuang
P. Dillon	C. Hui	T. Medcof	C. Sicoli	
K. Ellis	S. Hussain	M. Morriello	T. Stubbs	

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

Chair calls meeting to order at 11:31 am and reads the Land Acknowledgement.

2. **Dean's Remarks** (5 minutes)

International Women's Day.

Good news about summer programs' intake: significant headwinds around universities in general, but we are seeing strong interest in our professional master programs in terms of number of applications. Want to credit our recruitment team which has been working around the clock to make that happen. Too early to talk about fall numbers yet, but will come back with an update on those numbers in April.

New developments at Schulich: issuing a media release on Monday introducing a new graduate diploma in accounting analytics. Advanced Management Diploma proposal is on today's agenda as well—we do see that this is where management education is going.

Schulich Start-ups is now working with Vector Institute on the new Fast Lane program to support AI-based start-up companies in the Schulich community. Recent alums will benefit from this.

Case competitions- lots of recent successes. 3 recent first places. Kudos to Joe Fayt in his leadership of the graduate case competitions program.

Questions?

C. Graham: How are we being affected by the strike?

D. Zwick: We only have a few CUPE instructors, so for us it's mostly an operational matter in terms of Schulich students enrolled in courses outside of Schulich. I will hand it over to K. Tasa.

K. Tasa: There is more communication coming from Senate Executive later today. Keep in mind that some of the directives have dates attached to them this time. We do have some students in courses and programs that are active and continuing who are not participating during the disruption—Senate protects these students to be able to complete the courses in during the remediation of the strike.

Received a few requests from instructors to take their courses online. I've only turned down one request because the instructor didn't understand well the context we are in. For the most part, I have been approving these requests. One thing you will see in the memo today is that we need information—please inform the ADA's office and area staff if you are changing your course to online delivery. Happy to talk offline if anyone has questions or concerns.

W. Sheremata: I know the guidelines about what we should do. IN the past strikes, the guidance and the practice that I remember is that if a student doesn't want to cross a picket line, there is no penalty. My interpretation of that was to grade them based on what they had done up until the strike. Is that correct?

K.Tasa: that's incorrect. The memo will spell out the guidelines for remediation. Take a look at the memo when it comes out, if you have questions then, we can deal with them. The 2018 strike started on Week 9 of the term, so students had more of the term completed by then than the start of this strike.

G. Kanagaretnam: SSIR is dealing with a lot of inquiries and concerns. Luba or Lindsay could speak to that. Our own students coming to graduate programs like MAcc starting in May. So there's a lot of uncertainty, but the team is handling it.

L. Hillcoat: The concern escalates as time goes on. Especially from 4th years who are concerned about graduating on time. Exchange students are also at risk because they may not be able to graduate from their home programs on time.

L. Pan: As the Senate Executive releases details about academic relief for students, we need to look strategically about the implications for our students. We need to cross-reference against our internal policies and progress requirements, etc. Thank you everyone for supporting the students.

Chair: on to the student representatives for their updates.

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

C. Huang: Haven't heard any communications from PhD students to express concerns about the strike. Most of the PhD cohort is not teaching this term, so there is less impact. We are working on improving the mental health of PhD students by organizing events where people can connect. Planning a brunch, a guided tour of the ROM, and other initiatives, as well.

N. Choudhary: on the topic of the strike, students were scared in week 1. Most classes were moved online. Some students want courses to be held in person still. Especially weekend courses when there are no barriers to getting to campus in terms of pickets. Dean's Cup is this weekend. Prepping for the formal gala—hoping to see faculty members there. It's supposed to be held on April 19, should be seeing invites soon. Students have asked us to convey this: the internships and job hunt have been scary. The percentage of people with internships is lower than last year. Engagement for the other events are low.

4. **Motion:** Approval of the Advanced Management Diploma (AMD) (Type 2 Graduate Diploma)

Chair turns the meeting to the Vice-Chair. W. Shen asks for motion on the AMD proposal. Moved by A. Joshi and seconded by G. Kanagaretnam. A. Joshi presents an introduction and rationale for the proposed program.

P. Shum-Nolan: Congratulations to everyone who contributed to the development of the program. The internship issue always comes up. We normally think of a concurrent diploma as new courses. I'm looking at the proposal and the majority of the courses proposed for the program are not new. Isn't this double counting:

A.Joshi: No. The diploma legislation is clear that there can be overlap of requirements between diploma and associated degree programs. There needs to be some unique requirements, but not all need to be unique.

A.Diamant: Is the idea with the internships to place students where they are likely to get jobs?

A.Joshi: yes, as much as possible.

G. Kanagaretnam: The recruitment team has also identified that when recruiting overseas, internships opportunities becomes a key factor for prospective students' decision-making.

A.Diamant: Is enrolment potential based on the capacity to get internship spots?

A.Joshi: to some degree, yes. But we do anticipate the need to support students in finding internships initially until the revenue from the diploma can start to provide resources to expand the EE and PD office which has a mandate of helping to find more internship opportunities for our students.

A.Mawani: Are we trying to maximize or minimize enrolment in this program? Is it a warranty or a profit centre?

G. Kanagaretnam: we want to maximize helping the students.

L. Hillcoat: The reason doesn't matter. If students decide not to use it, it usually means it's because they've already found a job or work opportunity. If they opt in, great. Either way, it facilitates the end goal.

N. Choudhary: Just adding on, I wanted to bring a student perspective. Second years graduating, there's a sense of fear. Schulich and students can have much more conversation about the preparedness part. CCD can only do so much. Students are not always following the process in terms of getting resume and cover letter checked in advance. This diploma might help reinforce that process, as well.

Vice-Chair: Thank you for sharing your perspective, Niyati.

L. Hillcoat: the diploma also facilitates more flexibility for international students in terms of work hours and studying that is otherwise not available to them now. It helps to create equity between domestic and international students.

Chair calls the question. Motion carries.

5. **Motion**: Master of Business Administration Minor Program Change & Associated Course Changes

Moved by M. Valente seconded by A.Joshi

M. Valente provides context and rationale for the series of proposals. Rationales are laid out on p.120 and 121 of the agenda package.

Second motion moved by M. Valente seconded by K. Tasa.

C.Graham: raising this on behalf of a faculty member who had to send regrets for the meeting. What is the implication for the regular MBA students to take a 6000-level course in the first term?

M. Valente: usually 6000-level courses are taken in second year. We looked at the disruption to that structure. Keeping it as 5150 created even more obstacles and confusion. Medium to longer-term trajectory, the 5000 vs 6000 distinction is going to become decreasingly necessary to structure the program.

M. Biehl: M. Valente, I just wanted to tell you that you have my full support in bringing this course into the requirements for accelerated students. A number of accrediting bodies have asked us in the past why this hasn't been consistent between accelerated and regular, so this is helpful.

W. Sheremata: Wanted to echo concerns in the email and the comments I made in MPC. I think it's a good thing that accelerated students will take this course. My concern is about the current 5150 being renumbered to 6150. My preference would be to find a way to keep the current course as a course for regular students and create a separate requirement for the course for accelerated students because I'm concerned about the pre-requisites being followed in this new numbering system.

L. Hillcoat: I agree with you that it could be perceived as confusing, but students do also take an upper-year elective in the first year. Just wanted to point that out. SSIR helps students to enrol when they enter, so they will have support in understanding the requirements and program structure.

Chair calls the question. Motion carries.

6. **Other Business**

Vice-Chair turns the meeting back to the Chair.

Chair: we will update the attendance information in the minutes. Will turn it over to M. Biehl for an announcement about rankings requirements.

M. Biehl: FT has announced they want to make changes to the research requirement and how it is measured. They want to measure at a school-wide level and use that score in the program rankings, as well. For the EMBA, they would mix the results of Schulich and Kellogg in ranking the program.

For Schulich, that means we need to ask faculty update their Orchid or Web of Science accounts with publications. If you don't have one of those accounts, you should consider setting up one. Eileen, Farhana, or Simon will be in touch with you to support this process. The deadline is late April, so there is some time sensitivity. Thank you for your cooperation on this. I'm happy to answer any questions now.

7. **Adjournment**

Meeting adjourned at 12:50 pm.